

Destination: Innovation South Asia

Presented by: Julia Luscher



November 2024

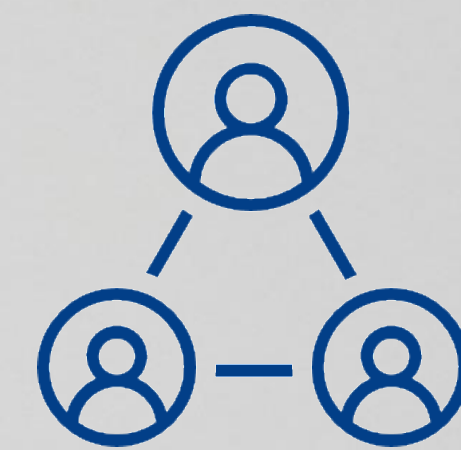
 **Tetra Pak**[®]
PROTECTS WHAT'S GOOD



Harvard Business School
defines innovation as
product, service, business
model, or strategy that's
both novel and useful



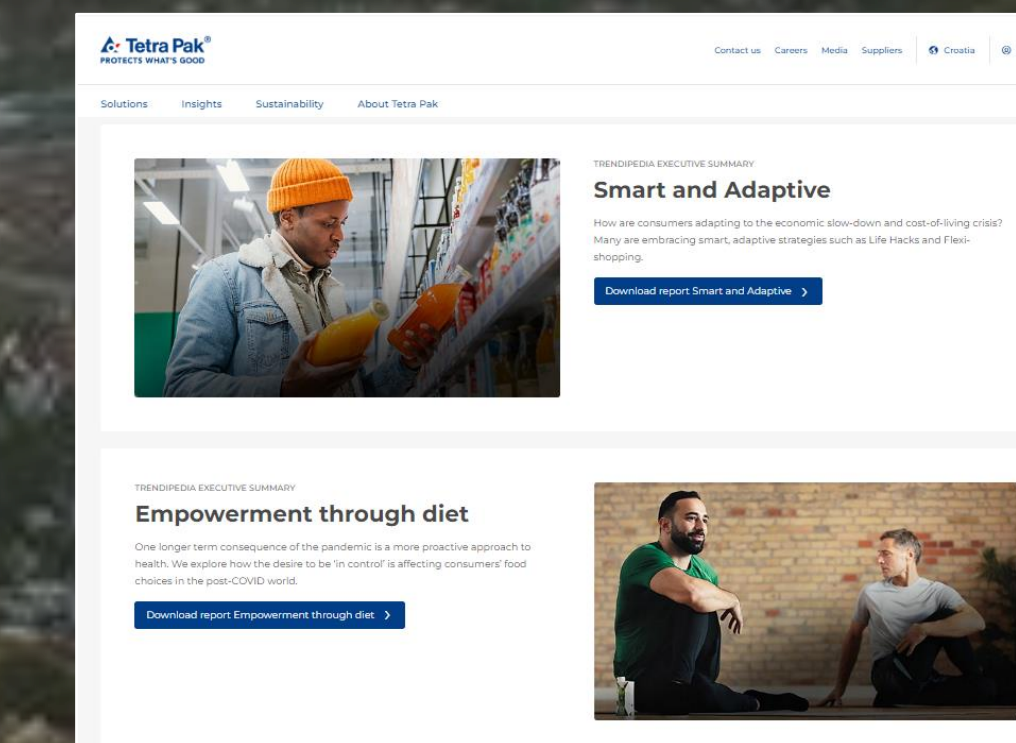
INNOVATION!
How to know
what is truly
useful?



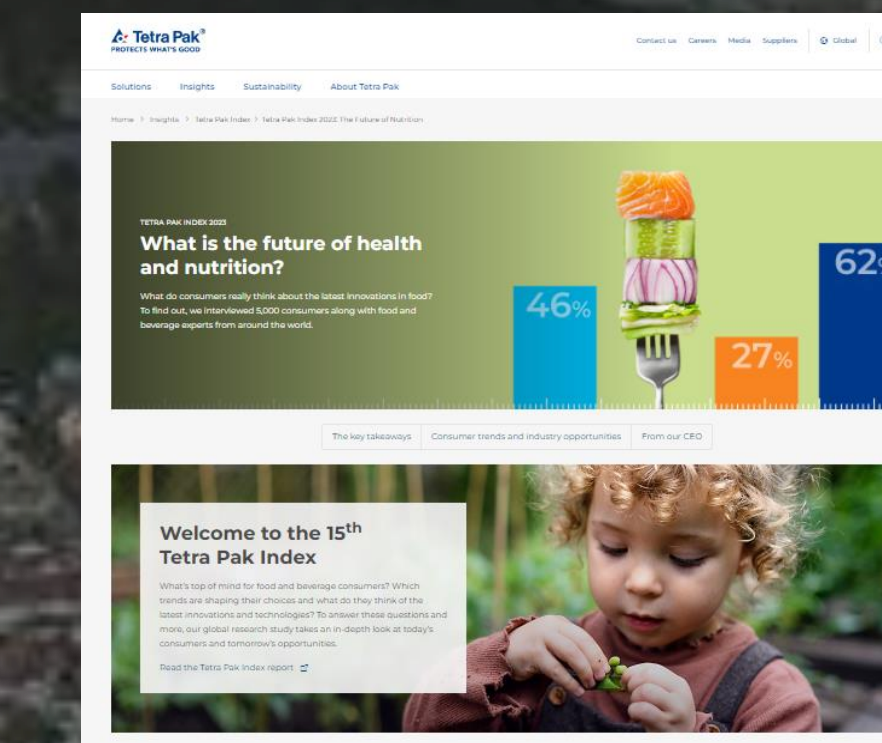


Identifying trends driving new growth opportunities

Working with over 40 trusted partners, we continuously research and analyse market and consumer trends



[Trendipedia](#)



[Tetra Pak Index](#)

HEALTH AND SUSTAINABILITY	A Better Me
CONTROL	Responsible Consumption
COMFORT	Functional Care
SHARING	Morning Routine
ENJOYMENT	Hydration and Refreshment
ENERGY	Snacking Time
	Evening Relaxation
	Together Out of Home
	Self-rewarding Indulgence
	Energy Balance
	Getting Ready for the Day
	Energy Boost

Consumer Demand Spaces



Challenges

I need to grow faster.
What can I do?

My products are not standing out from the shelf.

IDEAS? No, I have a plenty of good ideas, but I need to bring them to reality.

I want people to LOVE MY BRAND.

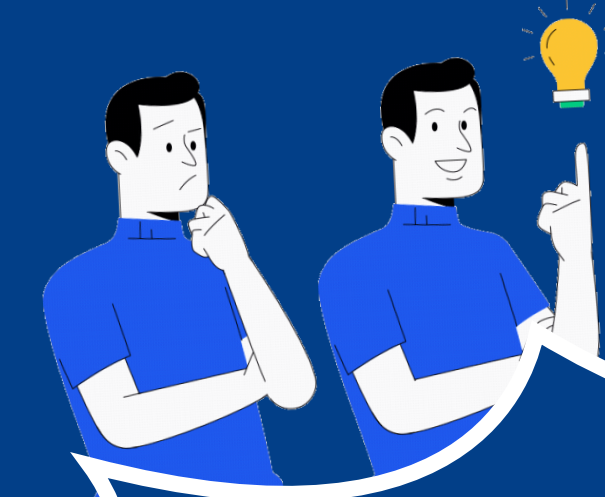


Innovation starts here.



from CHALLENGES to OPPORTUNITIES

Co-creation



Ideation of the concept



I need to grow faster. What can I do?

Visual prototyping



New artwork – new look

My products are not standing out from the shelf.

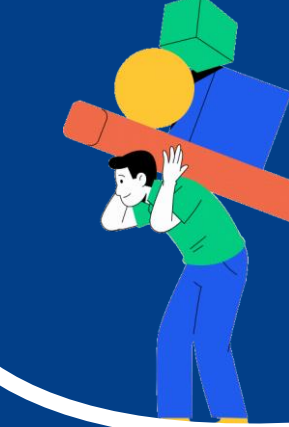


Prototyping

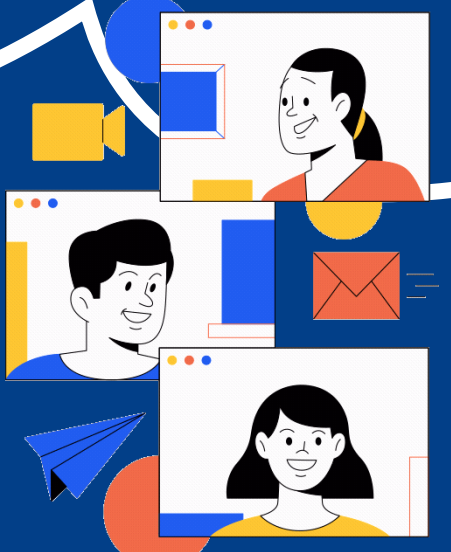


Formulation & recipe

IDEAS? No, I have a plenty of good ideas, but I need to bring them to reality.



Branding



Differentiation & consumer loyalty



Driving growth with demand spaces





Let me tell you a situation from our office



Innovation starts here.



What led to the difference in choice?



VS



Innovation starts here.



What led to the difference in choice?



CONTEXT

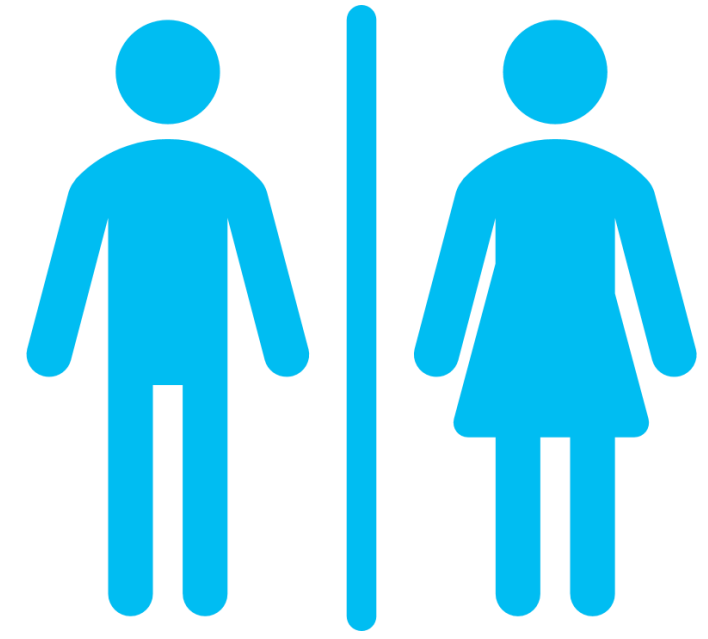
MATTERS



Innovation starts here.



Beyond the demographic factors... “moment” matters



While 25%

of our everyday choices is determined by demographic factors and aspirations...



75%

is driven by our immediate emotions and context.





Demand Spaces – what it is

A segmentation in multiple dimensions

- ▶ Anchored in the belief that consumer needs and choices vary based on the moment.
- ▶ Consumers have different needs at different times; therefore, the same consumer will exist in different Demand Spaces.
- ▶ Highly effective marketing tool that brings multiple elements of the consumer decision-making process into one single framework:
 - Functional and emotional needs
 - Situational context
 - Characteristics of the person



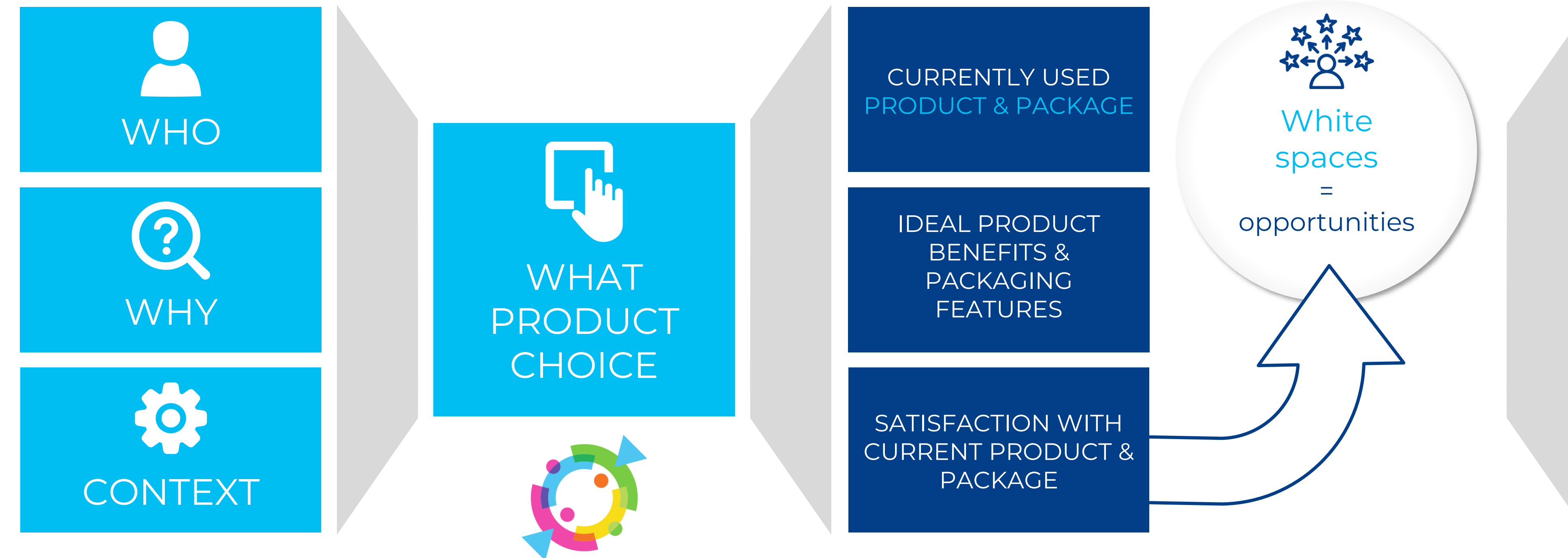
Innovation starts here.



Demand Spaces: a segmentation to drive growth

What is driving consumers' choices?

Understanding demand – *what consumers choose to consume and why* – is the foundation for any marketing strategy



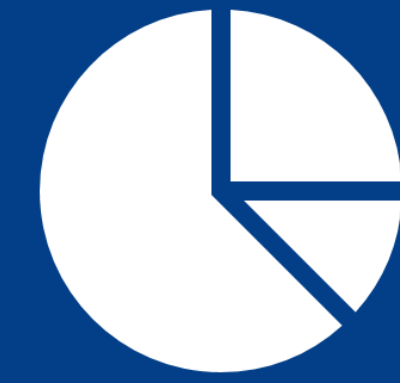
		% Occasions
HEALTH AND SUSTAINABILITY	A Better Me	6%
	Responsible Consumption	7%
	Functional Care	9%
CONTROL	Morning Routine	13%
	Hydration and Refreshment	14%
COMFORT	Snacking Time	7%
	Evening Relaxation	5%
SHARING	Together Out of Home	5%
ENJOYMENT	Self-rewarding Indulgence	8%
	Energy Balance	7%
	Getting Ready for the Day	9%
ENERGY	Energy Boost	8%

Size of Demand Space = the % of beverage consumption occasions (out of total occasions analysed) associated with this Demand Space.





Demand Spaces have a broad strategic remit within identifying business growth opportunities



Category
strategy



Brand
strategy



Innovation



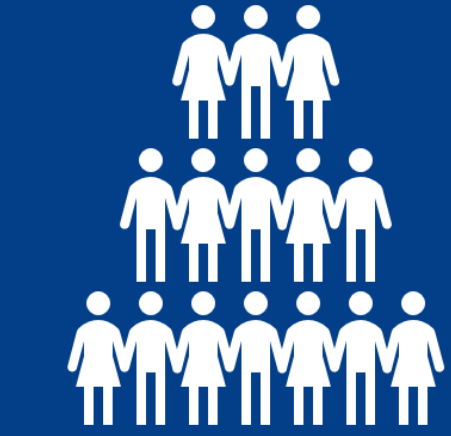
Communications



Positioning /
Jobs to be done / CEPs



Portfolio strategy /
White Space Analysis

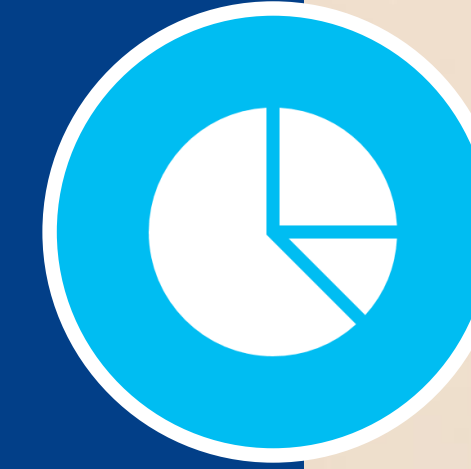


Channel / Customer
strategy





Category
strategy



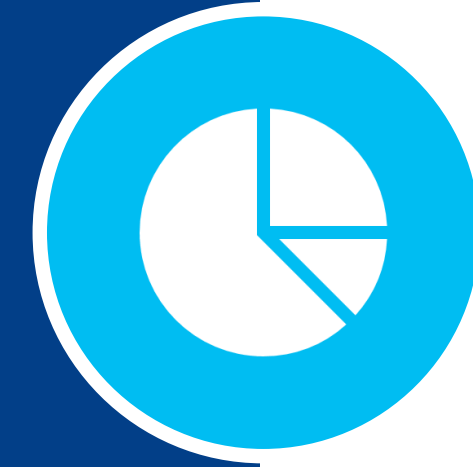
Reversing juices and nectars decline in Spain





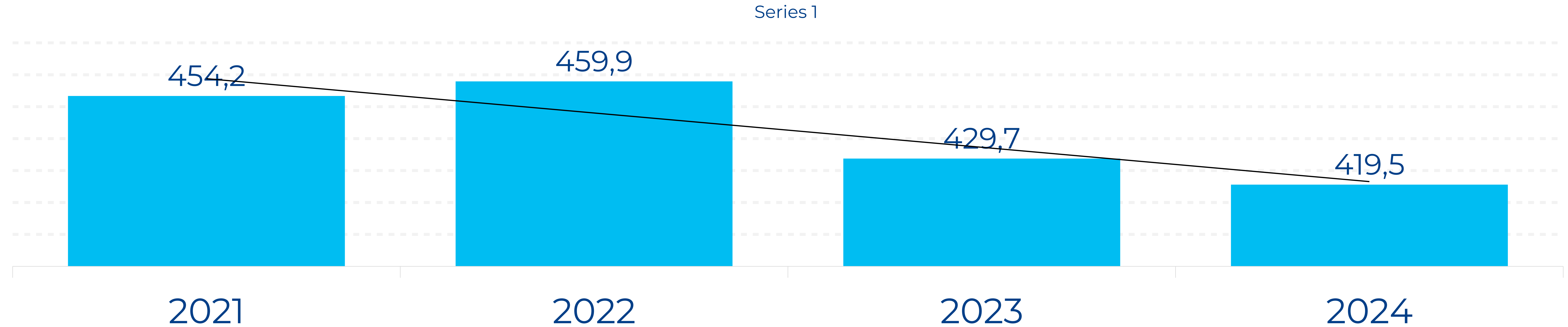
Category strategy

Reversing juices and nectars decline in Spain



Current situation

Year on Year decline of Juice and Nectar (JN) category in Spain



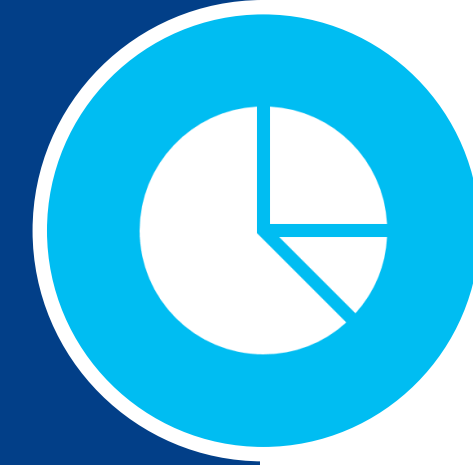
Source: Compass 2023. Spain Juices and Nectars





Category strategy

Reversing juices and nectars decline in Spain

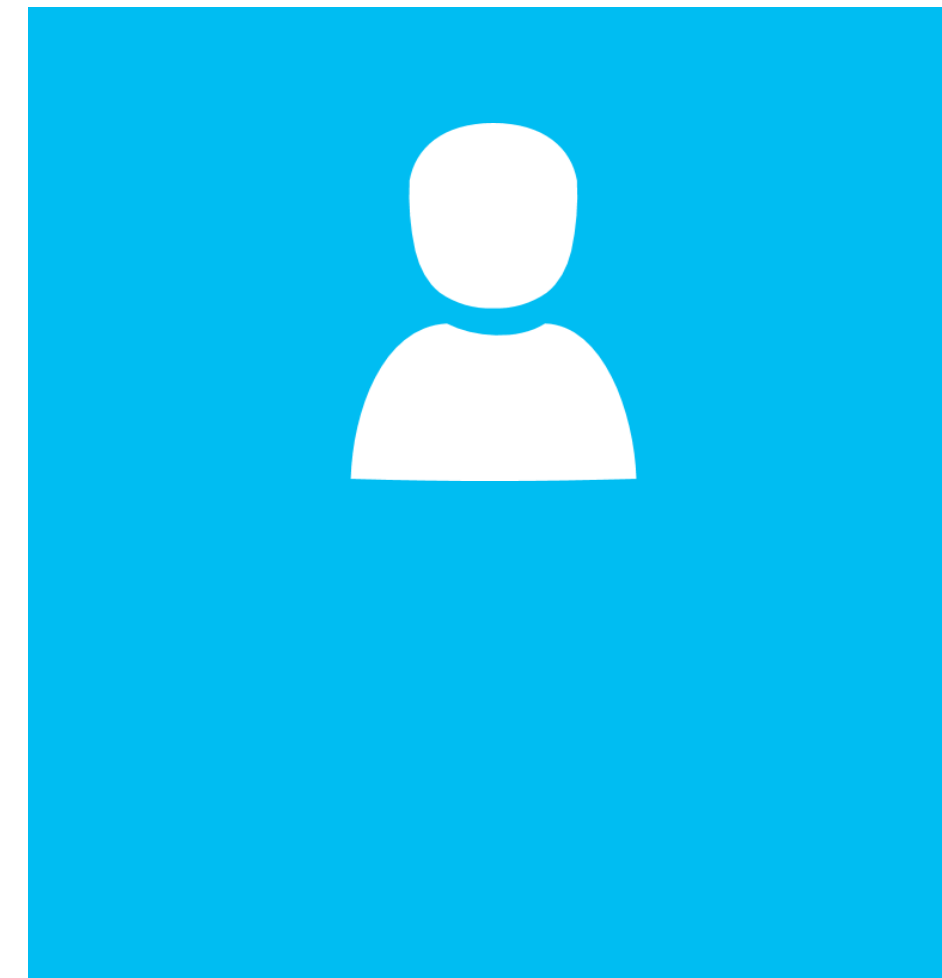


How we uncovered the opportunity through Demand Spaces Analysis?



Identifying key space for JN

- Morning routine is the #1 space where JN are consumed
- 22% of all JN occasions happen in morning routine



Identifying Key audience to unlock

Whilst morning routine is driven by JN for adults and Teens, Kids are lagging behind

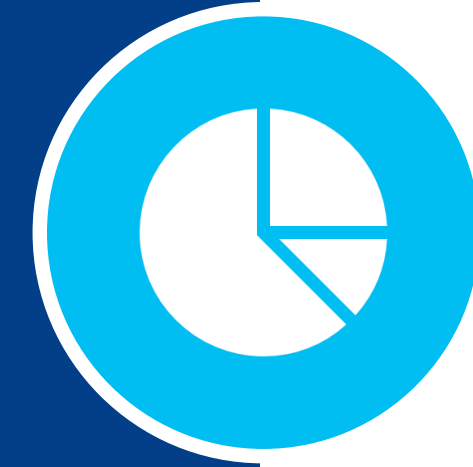


Innovation starts here.



Category strategy

Reversing juices and nectars decline in Spain

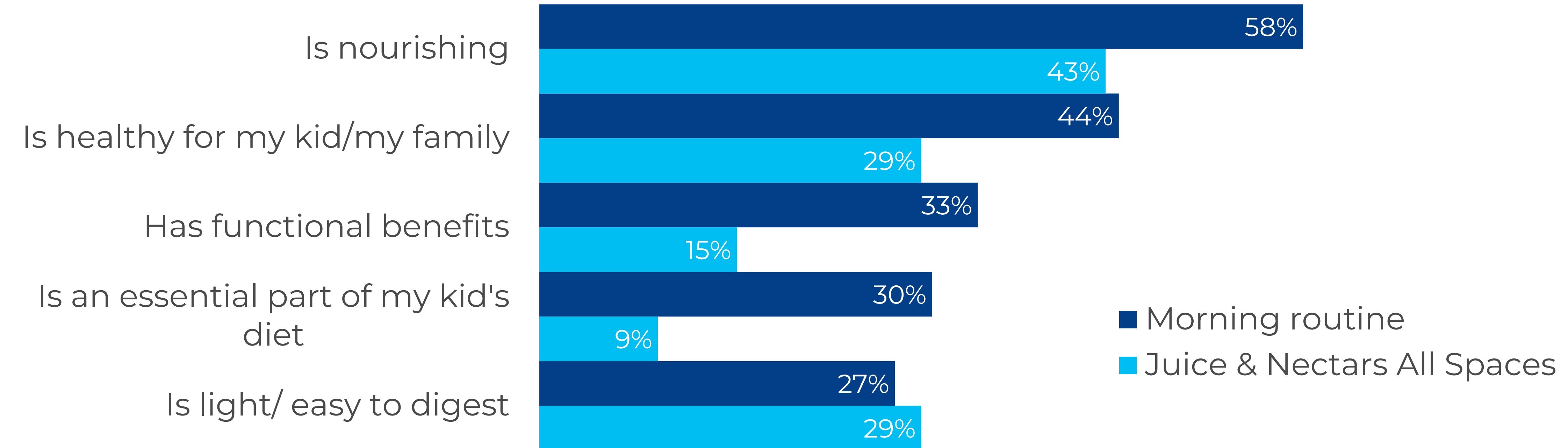


How we uncovered the opportunity through Demand Spaces Analysis?



Understanding gaps between what the category was delivering on vs Demand Space needs
Functional benefits in morning routine, ranked by %

Kids





Category
strategy

**Reversing
juices and
nectars
decline in
Spain**



Key insights to sum up unmet needs across JN in morning routine



Where can we establish JN in morning routine to cater to unmet needs for specific age groups?



Many functional benefits remain unmet.

Key needs around functional health and being part of the kids' diet.

Fresh ingredients & appropriateness for kids - key differentiating product attributes in morning routine.





AI Design driven insights



Innovation
starts here.



AI Design Services

What we can do



Evaluate assets
Measure and understand



Test & learn
Optimise and capture positive associations



Improve performance
Identify successful elements and maximise image potential



Simulate audiences
Learn from online interactions and simulate audience behaviour





How can we leverage AI to create powerful insights?

Regional differences

Contrasts

Raw Textures

Glasses

Repetition

Graphic Statements

Food

Greenery

Dairy alternatives category elements analysis



Repetition



Sharing textures



Diverse contexts





How can we leverage AI to create powerful insights?

Category engaging / opportunity elements identification

Packaging driven engaging / opportunity element mapping for the dairy alternatives category.



- Too small fonts
- Creases
- Squared/contained color
- Cap
- Package shape
- Busy design**





Are you ready?



Innovation
starts here.



“The faster we make our ideas tangible, the sooner we will be able to evaluate them, refine them, and zero in on the best solution.”

-Tim Brown, Chair of IDEO





We're
ready
whenever
you are



Thank you!

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