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What is New Zealand's red meat marketing strategy in China and how do we capture the premium end of the market?

Kellogg Rural Leadership Programme

Course 45 2021

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I wish to thank the Kellogg Programme Investing Partners  
for their continued support.

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## Acknowledgements

I would like to acknowledge the Rural Leadership Trust Team for putting on a fantastic programme for us. Phase one exceeded my expectations and has genuinely helped me to review and achieve my career and life goals over the past several months.

To Lisa, Desley and Annie Thank you for ensuring an amazing Kellogg experience and for organizing us all multiple times with changes in dates, deadlines, accommodation and course structures due to covid restrictions.

Thank you to Dr Scott Champion for your excellent facilitation and the steady stream of interesting content provided to the group via Slack. Dr Patrick Aldwell, thank you for your project guidance and inspiration to read more. I have certainly implemented your advice and have enjoyed returning to reading several books and allowing myself to prioritize this time. Chris Parsons, thank you for your great work at Rural Leaders and your contribution to our course content, I really enjoyed hearing some of your war stories and gaining an insight into leadership through that lens.

I'd like to thank the rest of Kellogg cohort 45 for being a great bunch of humans. I'm sure I have learnt something from every one of you. I look forward to continuing to get to know each other during the upcoming events, thanks to our covid adjusted programme.

To my husband, Mark, thank you for your support and understanding throughout my Kellogg journey, during what has been a very busy time for us. I wouldn't recommend planning a wedding and undertaking a Kellogg course over the same timeframe, but we got there.

Lastly, Thank you to the strategic partners of the Kellogg Rural Leadership Programme: DairyNZ, AGMARDT, Beef + Lamb New Zealand, Mackenzie Charitable Foundation and FMG.

## Executive Summary

China has traditionally been perceived by the New Zealand red meat industry as a destination for large volumes of secondary cuts. However, after four visits to China over the period 2012-2019, I felt that New Zealand still didn't fully recognise the extent of change and opportunity for our red meat represented by steady economic growth in China. This project set out to investigate the research questions of "What is our strategy in China?" and "How do we target the premium end of the market?".

China is New Zealand's largest export market for red meat by both volume and value. It is important that we demonstrate our commitment to the market by exploring and investing in our opportunities there. There is some rhetoric about putting "all our eggs in one basket" in China. So that we less exposed to reliance on shifting high volumes into this market, is important to maximise the value we get from our product in China.

This project consisted of a literature review of current New Zealand market activity in China and interviews with a number of industry stakeholders. A thematic analysis methodology was used to distill key themes from the interviews.

Currently, there is an overwhelmingly positive disposition among New Zealand's red meat exporters due to exceptional growth in both demand and pricing from China. However, this mustn't be confused with New Zealand success in the premium space. Lamb can be found on the menu at some high-end and Michelin star restaurants and the most recognized brands include Coastal Spring lamb and Lumina lamb. New Zealand Beef is not a premium product in China. If it is to be, there is plenty more work to be done.

One of the key challenges in marketing our meat in China is the fact that almost all meat is sold at the border, and we largely lose control of it there. This makes it difficult to ensure consistency of product and consistency of supply.

Consumer understanding of grass-fed meat is a challenge and New Zealand has invested in market education around health and environmental benefits. However, it is not clear whether this opportunity is ripe yet, or if this is the best focus for New Zealand investment.

In 2019 there was a notable lack of connection with consumers through social media marketing in China and low New Zealand presence on eCommerce channels. This has since improved markedly and demonstrates that our attitude towards China as a destination for premium products is changing. The market opportunity is now recognized and being invested in. However, we are only in our infancy of exploring the premium end of the red meat market in China.

Strategy for premium red meat in China needs to start with the product. Recognizable "premium" brands must have a story, not just a label. This must be backed by consistent product quality and consistent supply.

There is a real opportunity for meat companies to find and scale their niches. This requires a stripped-back approach focused on consistency of product and supply first. Smaller producers such as Coastal Spring Lamb have proven that "starting and scaling" can reap great rewards and larger meat companies are identifying similar opportunities. However, the scale of most New Zealand meat companies doesn't lend itself to this approach.

Identifying markets that can be supplied directly (not selling to distributors) is a potential opportunity. Currently, this is not a suitable strategy for most New Zealand meat companies. However, this blue-sky

approach with “premium brands” would enable price discovery, increased market insight, increased margins. While complex, boutique meat-producing operations gaining a premium from a great story and traceability information is something we might see in future.

## Introduction

China is New Zealand's main export destination for beef and sheepmeat, accounting for 36% of exports across the sector at a total value of \$3.4 billion in the year ending 31 December 2020. (Beef + Lamb New Zealand and New Zealand Meat Industry Association, 2021)

New Zealand was the first country to sign a free trade agreement with China in 2008 (New Zealand Ministry of Foreign Affairs and Trade, n.d.) which was a catalyst for export success, reducing tariffs for many of our primary sector goods including sheepmeat and beef which have benefited from 0% tariffs since 2017. (Beef + Lamb New Zealand and New Zealand Meat Industry Association, 2021)

Since 2008 New Zealand has had many notable successes in China, especially in the dairy sector. Now over 50% of all pizzas sold in China could be topped with NZ mozzarella cheese (Gerard Hutching, Stuff, 2017) and walking the streets in Shanghai it isn't hard to find a bubble tea stand enthusiastically pouring Anchor milk into exciting looking drinks for a long queue of customers. (He Wei, China Daily, 2020) (Tristram Clayton, NZ Herald, 2017).

The red meat sector's journey in China hasn't been quite so glamorous until more recently. A large proportion of sheep meat entering the China market is still secondary cuts which China pay higher prices for compared to New Zealand's number two sheepmeat market, the European Union which takes more primary cuts such as loins, racks and legs. (Beef + Lamb New Zealand and New Zealand Meat Industry Association, 2021). Despite this, there are some New Zealand lamb brands playing in the premium foodservice space in China. In 2019 China briefly overtook the USA as New Zealand's number 1 beef market by volume due to increased demand in China. (New Zealand Meat Industry Association, 2021) (Statistics New Zealand, 2020). However, New Zealand beef largely struggles to appear in premium retail and foodservice segments in China, where the dominant competitors are grain-fed beef products from USA and Argentina.

Rapid growth in New Zealand's meat exports has also brought about the challenge of managing our dependency on China as an export destination. This is especially true in the red meat sector where China seems to have demand for as much volume as New Zealand can supply and has historically offered the highest prices for many secondary cuts. With other destinations carrying higher tariffs for many of our agricultural exports, it has been very difficult for exporting companies to allocate a large portion of their volume elsewhere. (Beef + Lamb New Zealand and New Zealand Meat Industry Association, 2021) Recent effects of the covid 19 pandemic and updates to trade agreements have improved this dilemma, with the UK and USA markets now offering prices that compete with China.

If we want to reduce our dependency on China and allocate more volume elsewhere, we must improve the efficiency of our exports to China. Less volume, extracting the same or more value will allow us to achieve this. With significant reductions to trade barriers in other markets, it is also important that we demonstrate our commitment to China. This means an increased focus on targeting high-end retail and foodservice segments in China is needed.

The following research investigates New Zealand's red meat strategy in China, how New Zealand companies are successfully targeting the premium end of the China market and what further efforts are required to grow in this space.



## Aims and Objectives

This project sets out to understand the positioning of New Zealand beef and lamb products in China, gain an up-to-date insight into the successes achieved and challenges faced in the market today and understand the red meat marketing activities being carried out by both individual and collective New Zealand efforts in China.

This research aims to understand whether New Zealand is maximizing our opportunities regarding capturing the premium end of the market. The analysis will aim to take into account a range of perspectives on how we market, sell and distribute red meat products, how we connect with Chinese consumers and what the major challenges faced by exporters are. The purpose of the project is to use these findings to make recommendations on activities that will help to sell more red meat products as “premium” in the China market.

## Methodology

The methodology for this research included a literature review and thematic analysis from semi-structured interviews. The thematic analysis method (Clark & Braun, 2017) was chosen due to the large topic question and wide range of interviewees. The method aims to draw key themes from a range of different perspectives.

The literature review was key to refining the topic which began very broadly with “What is New Zealand’s marketing strategy in China?” This was further refined to focus on the red meat sector and then to focus on the challenge of positioning New Zealand meat products/brands in the premium end of the market (either in retail or food service). Resources used in the literature review included international and domestic news articles, industry updates and market insight reports. Metrics from Chinese social media marketing accounts were also compared. Some personal experience and personal communication from before this research (outside of the interviews) have also been drawn upon in this report.

While the literature review sets the scene for meat industry activity in China, the interview component of the project was necessary to answer the second part of the topic question “how do we capture the premium end of the market?”

A set of potential interview questions was formed at the beginning of the research. This was a helpful exercise for defining the research topic. As the literature review component progressed questions were able to be condensed and adapted as more understanding of the context was gained. This was a difficult part of the research as further information acquired led to many changes in the interview questions. A semi-structured interview method was decided upon, which allowed the interview discussions to move in a natural direction. This suited interviewing a wide range of professionals both directly and indirectly associated with the red meat industry. The guiding questions were sent to interviewees in advance.

The interviews conducted were from a broad range of perspectives. The nine people interviewed included meat processors, meat exporters, red meat marketing professionals both in New Zealand and

in China, Digital marketing professionals in China, industry good bodies, New Zealand expats living in China and other New Zealand food and beverage professionals in China (outside of red meat).

## Literature Review

The current state of trade with China

The covid-19 pandemic affected some of New Zealand's trade with China with overall exports to China dropping 2.8% in the 12 months to November 2020 compared to pre covid levels. (New Zealand Embassy in Beijing, 2020). However, the red meat sector has benefited greatly during the pandemic, lifting in both volume and value since 2019.

China was one of the few economies to grow in 2020 and set a target to grow GDP by 'at least 6%' in 2021. Major international analysts predicted that this would be exceeded, forecasting around 8% growth. (Foreign Affairs and Trade, Ministry, 2021)

### Growth trends

While there was much fanfare in the New Zealand agricultural sector around the 2008 free trade agreement signing with China, the sheer rate of growth in this market was still somewhat unprecedented. The below table extracted from (Daniel Conforte, 2013) shows that the rate of growth in New Zealand's sheepmeat exports to China was unprecedented, with the ministry of agriculture predicting that New Zealand would grow from sending 3% of sheep meat volume to China in 2009 to 7.3% by 2019-2024. A forecast well below today's reality with 50% of New Zealand's sheepmeat production landing in China.

*Table 1: Expected Proportion of New Zealand Sheep Meat Exports to China from 2013 to 2023-25*

**Table 2. Expected Proportion of Sheep Meat Exports by Value in 10 to 15 Years**

<b>Proportion of Total Sheep Sales</b>	<b>Current (%)</b>	<b>10-15 Years (Average %)</b>	<b>Standard Deviation*</b>
European Union	64	55.1	8.6
Middle East and North Africa	6	15.8	3.6
China	3	7.3	2.9
North America and Mexico	14	9	3.1
Japan	2	2.6	1.2
Other (including Russia and India)	12	10.2	5.0

*\*Note.* Standard deviation is a measure of the dispersion of individual answers from the mean. Generally speaking, the higher the standard deviation, the lower the degree of certainty.

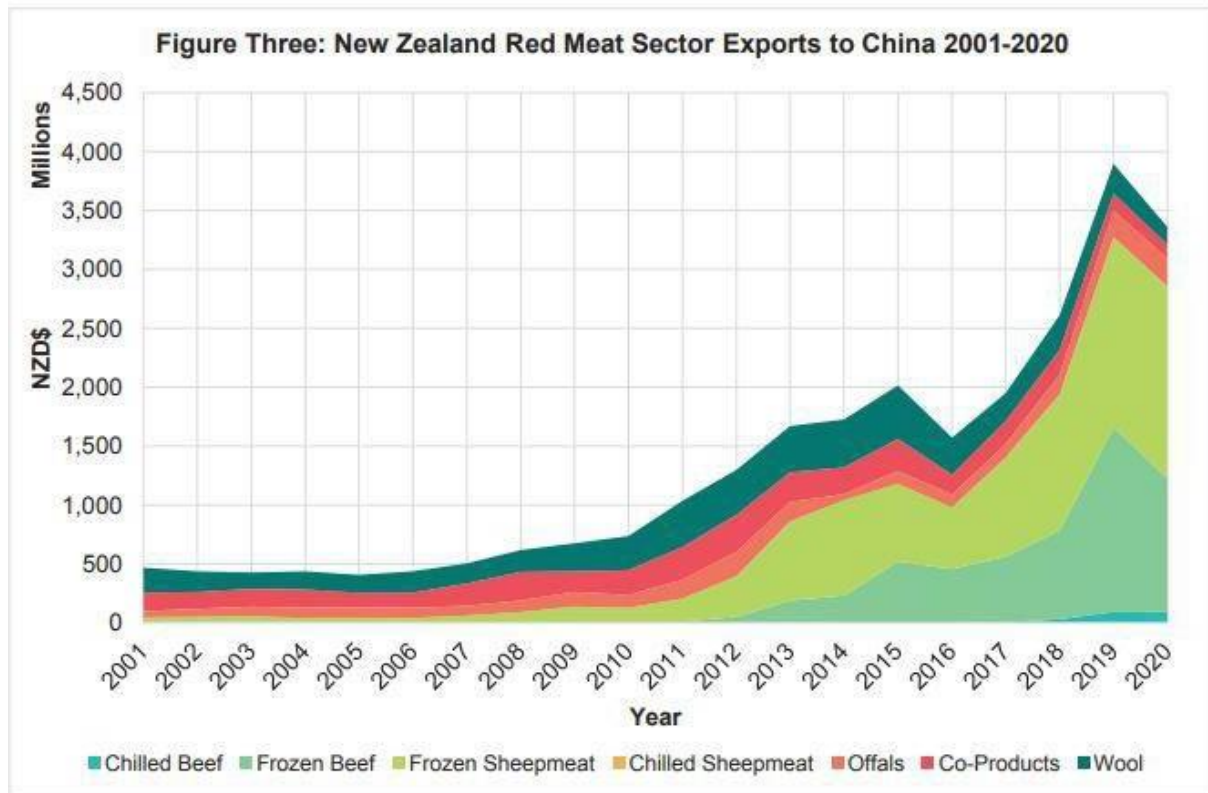
*Source.* Meat: The Future," Ministry Of Agriculture And Forestry, Wellington, New Zealand, 2009, [www.maf.govt.nz](http://www.maf.govt.nz)

(Daniel Conforte, 2013)

With such a dramatic change in our key sheep meat markets, how could New Zealand companies prepare and begin to execute effective marketing strategies? It is not surprising that one of the big questions around the ANZCO board table in 2013 was still "what should our (China) marketing strategy be?" (Daniel Conforte, 2013)

Growth in exports to China since 2008 has been significant across all red meat segments (figure 1), with China racing to become New Zealand's largest sheepmeat destination market. Exports to China dipped in early 2020 due to China's covid-19 virus peak (Silver Fern Farms, 2021) and the complete halt in foodservice activity due to lockdowns. However, rapid recovery in late 2020 saw monthly sales ahead of 2019 reflecting an increase in demand from China (Silver Fern Farms, 2021) which continued into 2021

Figure 1: New Zealand Red Meat Sector Exports to China 2001-2020



(Beef + Lamb New Zealand and New Zealand Meat Industry Association, 2021)

### Factors driving increasing beef exports to China

New Zealand's beef exports to China tripled in the three years to 2021 (Beef + Lamb New Zealand, 2020) with China briefly overtaking the USA as New Zealand's number one beef destination in 2019. This occurred due to the following influences:

- African Swine Fever impacting local pork production in China
- Australia is in a process of herd rebuilding and facing trade barriers to China
- Argentina's government introducing export restrictions to slow inflation
- Brazil dealing with a BSE (Mad Cow Disease) outbreak.

(New Zealand Meat Industry Association, 2021)

## The Landscape

### The modern Chinese consumer

McKinsey and company's 2016 modern consumer report found that Chinese consumers were increasingly valuing happiness, healthy living and family time. (McKinsey and Company, 2016) Brand loyalty was also increasing with many consumers willing to trade up to higher quality "premium" products as opposed to value brands, and fewer (10% less than in 2012) consumers were willing to venture outside of their trusted selection of brands. Based on the trends of the emerging values in the McKinsey report it makes sense that to become one of these trusted brands, New Zealand meat companies and industry need to focus on conveying the concepts of health, happiness and family time in their China marketing campaigns.

50% of consumers in McKinsey's 2015 survey seek the best and most expensive offering as a general rule when choosing brands. (McKinsey and Company, 2016) The report also found that foreign brands hold the dominant position in the perceived "premium" segment. This bodes well for New Zealand meat companies to offer more high-value products in China, such as premium restaurant cuts or niche home preparation products such as Silver Fern Farm's conveniently packaged "Honest Beef and Lamb Burgers" that we see in New Zealand.

McKinsey and company's report also stated that "spending on food and beverages for home consumption is stagnating or even declining." (McKinsey and Company, 2016) However, it is interesting that this trend has been the opposite since covid-19 lockdowns forced people to cook more meals at home and some of these habits have stuck. Owing to change in consumer behaviour with Covid-19, SFF's (Silver Fern Farms') ability to supply meat to the doors of consumers via online platforms has helped capture consumers' rising demand to cook at home. (Ouyang Shijia, China Daily, 2021).

### *The concept of family time in retail shopping.*

While E-commerce is king in China, that doesn't make brick and mortar stores redundant by any stretch. Physical stores offer "retailtainment." (McKinsey and Company, 2016).

In 2015 two-thirds of Chinese consumers cited shopping as a means to spending time with family, this statement was up 21% compared with three years earlier. (McKinsey and Company, 2016)

These trends lend themselves to in-store experience type marketing campaigns for New Zealand meat products. Perhaps involving the whole family in a fun typically kiwi activity would be an opportunity to grab attention.

### China's interest in synthetic meats

There is growing interest in synthetic meats in China. Alternative meat sales in China have grown 33.5% since 2014 (Nelson Low, CME Group, 2020). China has recently released its 5-year agricultural plan which, for the first time, mentions "cultivated meats and other "future foods" like plant-based eggs" in its plan for food security in future (Aryan Baker, 2022).

Big names in the synthetic meat sector such as Impossible Foods, Beyond Meats and Nestle are all preparing to enter China and/or begin manufacturing operations for their synthetic meats there (Nelson Low, CME Group, 2020). China is also home to two meat substitute companies, Zhenmeat and Starfield (Nelson Low, CME Group, 2020) (Nelson Low, CME Group, 2020).

Alternative meat interest is not only grounded in beef but also being explored in pork. Right Treat, a Hong Kong company was the first to produce a pork substitute with its OmniPork and OmniMince, containing a blend of pea, soy, shiitake mushroom and rice protein. (Nelson Low, CME Group, 2020) Omnipork was developed with Asian chefs to ensure suitability for traditional Asian dishes.

China's increased interest in synthetic animal proteins is a very strong indicator that the New Zealand industry needs to become more focused on value rather than volume in China. Not only will this help us out of having "all our eggs in one basket" in a market share sense, but it will also allow us to cement a spot for New Zealand red meat in China in a very different looking future.

It is important to be aware that once Beijing says it has a plan to achieve targets, China's progress is not to be underestimated. This can be seen in the rise of winter sports in China over the past several years leading into the 2022 winter Olympics. The government target was set in 2015 at 300 million people participating in winter sports by 2022, and this was exceeded with a recorded 346 million people giving winter sports a try (Ap, 2022).

Introduction of synthetic animal protein to China's plan should not be seen as a threat to New Zealand's meat export future but as an opportunity to narrow our focus in China to marketing premium, consumer-facing meat brands and products which will remain as the origin of lower value meats changes. This trend also may help increase the value of our meat exports in China by default.

Imagine a future where real animal meat is the premium and pricier option for Chinese dining out, as opposed to eating potentially cheaper and more readily accessible alternative protein meats. If this is the future, perhaps New Zealand's export volume can be spread more broadly across markets, with high-value products targeted to a smaller population of target consumers.

It is important to note that Climate Change and emissions reductions pressure, along with Healthy China 2030 are key drivers to interest in synthetic meats, both for China broadly and for individual consumers. New Zealand grass-fed beef and lamb fits this narrative perfectly. This further reinforces the need for New Zealand's meat marketing strategy to focus on the aspects of good health and superior environmental stewardship.

### Importance of Ecommerce

China is the world's powerhouse for online shopping, with over 50% of online sales worldwide taking place in China. (Ninia, 2020) Despite the large footprint of eCommerce in China relative to the rest of the world, there was still rapid to be had with pandemic related changes in consumer behaviour. In 2020 online retail sales amounted to NZ\$2.47 trillion, a 30% share of total retail sales. (New Zealand Trade and Enterprise, 2021), and this has grown even further with online now accounting for 50% of China's total retail sales (Emarketer.com, 2021). The importance of digital and social media marketing goes hand in hand with this.

Growth in E-commerce means potential growth in sales for New Zealand red meat brands, so long as they are present among the popular eCommerce stores. Zespri is forecasting online sales growth to 35% of its China sales, up from 10% before Covid-19. (New Zealand Trade and Enterprise, 2021)

Ecommerce and online transactions in China are a much larger part of everyday life than in the US or any other country, and this has only been accelerated by the covid-19 pandemic. For example, pre-pandemic Amazon's largest sales revenue day, Amazon Prime Day earned over USD 5.8 billion in 2019, while Alibaba's Singles Day on 11<sup>th</sup> November 2019 earned over six times more at USD 38 billion. (Ninia, 2020).

One of China's busiest e-commerce platforms, Alibaba grew revenue by over 50% in 2019 (Larry Dignan, 2021), for contrast Amazon achieved 20% revenue growth (Davis, 2022). In 2020 Amazon grew revenue by 35% (Davis, 2022), while Alibaba grew 36% (Larry Dignan, 2021)

## Marketing

### Social media and digital marketing

China's online landscape is vastly different from the west. Never mind Facebook, Instagram or Amazon, China has its own set of social media apps and eCommerce platforms with membership levels rivaling the likes of Facebook messenger and Twitter. Just like in the west, consumers want to be entertained and educated online and are looking to form deeper connections with the brands they support. Therefore, if we want New Zealand products to be the first choice for modern-day Chinese, we must have a strong presence in these domains.

New Zealand companies need to have a solid understanding of China's digital landscape. We cannot educate and connect with our consumers if we don't keep up with the places their attention is going. But how well are we currently doing this? Are we keeping up with the pace of change?

For food and beverage brands in China, social media is an important tool for building brand recognition and reputation and for directing consumers to eCommerce sales channels. Successful NZ brands are building beyond the country-of-origin story and developing direct consumer relationships through the use of social media (New Zealand Trade and Enterprise, 2021).

Omnipresence across social media platforms in China is as important, if not more than in New Zealand, especially due to the ability to link consumers directly to eCommerce stores. It is encouraging to see Beef + Lamb New Zealand launch their Taste Pure Nature campaign across the Douyin (Chinese app that led to TikTok) and Little Red Book platforms, in addition to its existing WeChat brand account. (Beef + Lamb New Zealand, n.d.). Below is a snapshot of New Zealand's red meat marketing activity on WeChat (see table 2).

Table 2: A brief summary of social media activity in China by New Zealand's red meat sector.

Account/Company	Platform	Number of reads	Frequency of posts	Links to sales platforms
Silver Fern Farms	WeChat	400-800	4/month	JD.com Flagship Store
Taste Pure Nature (B+LNZ)	WeChat	100-500	4/month	No
ANZCO Foods	WeChat	200-700	4/month	No
Pure South (Alliance Group)	WeChat	20-50	Infrequent	No
Coastal Spring Lamb	Not on WeChat but highly discussed by foodie circles on other WeChat and Douyin accounts	Mentioned in articles with 1-2k reads		The Deli Market JD.com
Lumina Lamb	"Te Mana" Lumina's previous name is highly discussed on WeChat.	Mentioned in articles with 48k reads		

Both Coastal Spring Lamb and Lumina do not have their own actively managed WeChat accounts (Table 2). For Lumina at least, this is a very deliberate strategy. Both of these brands target the foodservice sector as opposed to retail. To preserve the high-end positioning of these brands, they have kept away from the retail space and are only made available to the likes of fine dining or Michelin star restaurants.

Despite this, a quick search of WeChat reveals that both Coastal Spring Lamb and Lumina lamb (under its previous alias Te Mana Lamb) are highly discussed in articles by chefs, fine dining and foodie accounts. despite not having their own actively managed social media accounts. The level of organic promotion they each receive on social media demonstrates that these are both recognizable "premium" New Zealand lamb brands in the fine dining arena.

While it is a commendable and logical strategy not to have dedicated social media accounts, one of the big differences between China and New Zealand's social media landscapes is that Chinese WeChat is a "lifestyle app" rather than a social media platform. It almost serves as the entire internet in China. In New Zealand, if a brand wasn't on social media, you would still be likely to Google it and find out more about it, even if it was only available in restaurants. However, in China, there is no Google, and the China equivalent, Baidu is not widely used in the same way Google is and is not likely to yield the desired results. It will be difficult for Chinese consumers to find a ".com" website. For that reason, brands may

like to consider having a WeChat account, not for social promotion and driving eCommerce sales, but even if only to link through to their website.

Silver Fern Farms WeChat posts contain click-through links to their JD.com flagship store. Connecting marketing efforts to purchasing points has been a challenge for the red meat sector's China strategy in the past. It is difficult to coordinate supply with marketing efforts, especially due to the fact the product is usually sold to an importer at the border. Strong in-market relationships with importers and distributors are essential for New Zealand's larger meat companies, to ensure they have some influence over where a product is sold (or not sold) and can request a commitment to certain end-users. Silver Fern Farms has only been able to host its flagship store on platforms like JD.com since moving its headquarters to Shanghai in 2020 (Primary Collaboration New Zealand (Shanghai).co, Ltd., n.d.). This is a significant step towards streamlining customer experience with customers able to purchase the product for home delivery within a few clicks. In the six months to June 2021, Silver Fern Farms doubled its online sales in China, and this growth trend has continued. "New channels such as e-commerce, community group buying and live streaming e-commerce will not only help us sell more products, but also bring Silver Fern Farms closer to customers in China." (Ouyang Shijia, China Daily, 2021)

## New Zealand collaborative Initiatives and joint marketing efforts

### *Primary Collaboration New Zealand*

It's no secret that doing business in China is not for the faint-hearted. Not only are there cultural differences and language barriers for New Zealanders to come to grips with, but the legalities of operating a foreign company in China are also complex and the role of the political system in business is wildly different from what businesses experience in New Zealand. Many foreign companies in China have a Wholly Foreign-Owned Entity (WFOE) structure. Essentially this is an investment vehicle for foreign companies to enter China without the requirement to have a mainland Chinese investor.

Primary Collaboration New Zealand is an example of a food and beverage industry collaboration. It is a WFOE founded by multiple New Zealand primary industry shareholders, formed to help New Zealand food and beverage brands establish relationships on the ground in China. Picture a 23<sup>rd</sup>-floor shanghai office where 1-2 employees each from Synlait, Sealord, Villa Maria Wines, Mr Apple, Bostock, Freshmax and Silver Fern Farms all sit next to each other. A CEO oversees the group's operations, and the office employs local admin and support staff. The overall atmosphere is reminiscent of a little New Zealand focused family. This has been the pathway into China for Synlait, Silver Fern Farms and Kono who are the first three graduate companies of PCNZ. (Primary Collaboration New Zealand (Shanghai).co, Ltd., n.d.) The PCNZ pathway allows brands to get started and grow in China until they have the necessary commitment and resources to set up their own headquarters in the market. Synlait set up its China headquarters in 2019 and Silver Fern Farms moved its sales office to Shanghai in 2020. Graduating from PCNZ allows SFF to sell products in China domestically as opposed to via cross-border channels, opening the door for direct access to more eCommerce platforms via flagship stores on the popular Tmall and JD platforms.



### *NZ Food Basket*

This initiative began in 2019 with eighteen New Zealand food and beverage brands banding together to sell their products on Alibaba's Tmall platform under a single storefront called New Zealand Food Basket. The first nine brands to start selling via the new storefront were Pic's, Babich Wines, Vogel's, Rockit apple, Future Cuisine, Pamu, Zealong Tea Estate, Fiordland Lobster and Oha Honey.

The concept of collaboration was great, as was the strategy “to be direct to consumer, both from a sales perspective and trying to earn more margin than what you would normally get through other channels.” (Te Hono, n.d.) However, this venture has been plagued with challenges. One of these challenges is the fact that Chinese consumers are very driven by and accustomed to discounting on such platforms (Te Hono, n.d.). Perhaps this model does not suit New Zealand food and beverage products targeting high-end consumers.

### *Taste Pure Nature*

Taste Pure nature (TPN) is a campaign implemented by Beef + Lamb New Zealand to promote all New Zealand meat brands and products under one “New Zealand” umbrella. The campaign was established in China in 2020 following a 2019 launch in the USA. Taste pure nature collaborates with New Zealand meat companies, providing resources to assist with marketing efforts. The Taste Pure Nature logos are used in marketing by New Zealand meat companies at events. Co-branding on New Zealand meat packaging aims to form a consumer connection with New Zealand’s country of origin story.

The strategy for releasing Taste Pure nature was to pilot it in a smaller city first (during an in-store customer experience). Marketing spends now go towards social media marketing and assisting meat companies with their events. Key opinion leaders (KOLS) who are the China equivalent of social media influencers are contracted for promotion on social media (Beef + Lamb New Zealand, 2020). One of the key objectives for TPN is to improve education around the benefits of grass-fed meat. (Beef + Lamb New Zealand, 2020) Chinese preference for grain-fed taste and lack of understanding of the environmental benefits of grass-fed is a challenge for our beef exports. This is one of the reasons that we don't see New Zealand beef ranking in the premium space in China as we do with lamb.

### *People on the ground*

The below table gives an insight into sales and marketing staff on the ground in China (Table 3). Staff levels are very lean in the red meat sector compared to New Zealand dairy. This is likely due to the nature of the supply chain where most of the logistics within China are handled by in-market partners.

*Table 3: People on the ground in China in the New Zealand food and beverage sector*

<b>Company</b>	<b>Number of staff</b>	<b>Notes</b>
Fonterra	1,774	In the Greater China region
Synlait Business Consulting (Shanghai) Limited	?	WOFE Structure created in 2019 After graduating from PCNZ
Silver Fern Farms	2	Belonged to PCNZ until 2020

		Now it's own WOFE
ANZCO Foods		
Alliance Group	0	China market managed from Singapore office
Beef + Lamb New Zealand	0	Had one contracted staff member on the ground until 2021.
Meat and Livestock Australia	6	Based in Beijing

In some situations, in-market partners will do all of the social media promotion on behalf of the New Zealand company, this is true of Grand Farm which handles the majority of Alliance Group's retail product in China. In 2015 Alliance Group signed a deal with Grand Farm (Gray, 2015) where it now sends whole carcasses to be further processed at Grand Farm facilities leading the meat to be "co-branded" as Pure South-Grand Farm products. Grand Farm is China's largest importer of sheep meat (Gray, 2015). Grand Farm Alliance Group targets the consumer-facing retail market with its Pure South lamb products. These can be found in Chinese supermarkets and online platforms such as TMall as part of the NZ Food Basket store.

Another reason for low staffing levels in the market for red meat could be that there is less need for meat companies to prospect for new customers and shop around for the best pricing. This is due to longstanding and favourable relationships with in-market partners.

Meat and Livestock Australia have in the past had some real influence in the China beef market. However, their structure and available marketing budget are vastly different from our equivalent, Beef + Lamb New Zealand.

## Findings and discussion

### Themes emerging from industry interviews

The process for analysing interviews and arriving at themes follows the suggested steps from (McGuire & Delahunt, 2017) on how to approach the (Clark & Braun, 2017) thematic analysis method. Due to the small number of interviews conducted some of the themes of the conversations were immediately obvious. To confirm these, notes from interviews were reread and the number of times these themes appeared was noted.

Did this methodology work for my research question? While it was an effective method for drawing out themes, there is a key message that the themes do not take into account. While “positive outlook” is one of the emerging themes, this relates more specifically to recent high demand and high prices paid by China for New Zealand beef and sheepmeat. This means New Zealand is doing really well from a volume and revenue perspective, but what about our premium brands? In contrast to this, some of the interviewees offered a more critical analysis of our market activities in China. Despite high demand and pricing there are opportunities we haven’t yet explored, and we are only just dipping our toes in the water in the premium brand space. Some perceived a lack of investment and commitment from New Zealand companies in premium brands.

*Figure 2: Emerging Themes from industry Interviews*

## EMERGING THEMES

### What makes a “premium” brand?

- The Story
- Consistent product
- Exceptional taste
- Customers meet the farmers
- Consumer recognition
- Michelin Star

### Positive Outlook

- Increased demand
- Higher prices
- New consumer trends
- Better access to eCommerce channels
- Fantastic growth
- Great in-market relationships
- Efficiencies created
- Demand for premium brands

### The need for in-market partners

Necessary

Excellent business model

**vs**

Top brands should sell direct

Real opportunity (to go direct)

Sleeves rolled-up attitude

## Thematic Analysis

Three key themes emerged from the research interview phase.

### What makes a “premium” brand?

Most of the interviewees mentioned a similar set of characteristics that determine what makes a brand “premium’. The key findings are, customers have to be able to access the product, there must be a story with a human connection that customers and consumers can buy into, and the product must taste the same every single time. A tough standard, but a necessary one to qualify New Zealand meat for Michelin Star dining tables.

### Positive Outlook

An overwhelmingly positive outlook on the future for red meat demand in China came through strongly in all interviews. With consumer behaviour changing rapidly and new trends such as dry aging of meat growing considerably, there are many opportunities to capture consumer attention with niche meat products. There is resounding positivity among exporters due to both a rise in prices and demand from China for meat products. Although the benefits of this will be seen without increasing our footprint in the premium space, we must focus on our premium brands and create a foothold. This shows our commitment to the China market and will have downstream effects on the price for all New Zealand red meat products. The true strength of our premium brands will only be tested in a down market; however, we must take the opportunity to focus on creating premium brands during favourable market conditions

### The need for in-market partners

The third common theme from discussions was the need for in-market partners. Although all had a clearly articulated and logical standpoint on this, interviewees both agreed and disagreed on whether in-market distributors were necessary. This is interesting since the relative loss of control of products entering China is a factor influencing many key challenges for marketing and building recognizable brands. Positivity towards in-market buyers and distributors is understandable from the viewpoint of trying to maximize carcass efficiency through selling secondary and low-grade cuts. Local distributors are likely to have the necessary processing knowledge and market insight to allow them to move cuts of meat that New Zealanders are not familiar with. On the contrary, the negativity towards selling to in-market partners indicates that there is some opportunity to sell directly and earn higher margins. Perhaps this is only an option when working with a very defined range of products and selling into a niche area.

How are New Zealand meat companies successfully targeting the premium end of the market?

“The Chinese consumer is evolving. Gone are the days of indiscriminate spending on products. The focus is shifting to prioritizing premium products and living a more balanced, healthy, and family-centric life.” (McKinsey and Company, 2016)

### Case Study: Lumina Lamb

Lumina lamb is a joint venture between headwaters (genetics innovation company) and Alliance Group (meat processors). Over 10 years of research and development by Headwaters has gone into genetic selection for the increased intramuscular fat in lambs. The genetic traits of Lumina lamb along with a strict requirement for 35-day chicory finishing and 21 days aging before snap freezing leads to a milder taste and ensures consistent taste in the Lumia product every time. Lumina (previously known as Te

Mana lamb) targets the high-end foodservice market in China. It has built its brand using a stepping-stone strategy starting in Shanghai and establishing in one tier 1 Chinese city at a time. It can now be found in fine dining restaurants in Shanghai, Beijing, Guangzhou and Shenzhen.

### Case Study: Coastal Spring Lamb

Coastal Spring Lamb is an incredible story. Started by Richard Redmayne, a farmer in Turakina, the brand encompasses lamb from 18 different New Zealand supply farms, all situated on the New Zealand coastline and "naturally seasoned by the sea". Coastal Lamb, the export brand, debuted in Vietnam before entering China. The strategy for export is a very "sleeves rolled up" approach. In the beginning, once the first container had been sent Richard would fly up to the destination market and meet directly with restaurants and chefs to form relationships and have them try the product. Coastal spring lamb works with Ovation as their meat processor partner in New Zealand, however, the meat is sold directly to restaurants in China, a key difference to the traditional New Zealand strategy that sells via importers and distributors. Strong relationships are key to this kind of strategy and being able to provide a consistent product and year-round supply helps to ensure a supply arrangement that works for both parties. Coastal Lamb solely targets the foodservice market and can be found in several high-end and Michelin star restaurants.

Both Lumina and Coastal Lamb are brands targeted at high-end food service only. They are not available for retail sale in China, however, the success of these brands in the fine dining arena has potential for positive downstream effects on New Zealand retail brands such as Alliance Group's Pure South branded products.

### The Challenges

#### How do New Zealand meat products reach consumers in China?

One of the foremost challenges with New Zealand meat entering China is the fact that almost all meat products are sold to an importer at the border. China would be a complicated landscape for New Zealand meat companies to navigate with the large volumes of meat and array of products exporters, which is why local distributors are used. While logistics become easier this way there are also some obvious negatives to this strategy. The most obvious downside to this is having one or more middlemen in the supply chain meaning some of the potential margin is lost. Further to this New Zealand companies have little control over what happens to some of the meat sold. Sometimes the meat will be packaged or repackaged in the market which can lead to low-value cuts being marketed as "New Zealand beef" and looking like a primary cut on the shelf. It is estimated that only 10% of New Zealand's meat products exported to China make it into a supermarket or similar retail space with a New Zealand company's branding on it. The majority is packaged locally and sold under Chinese brand names, with or without reference to New Zealand.

#### Lack of control and/or insights

In the past having a lack of control over where the meat goes and where and when it will become available to the end consumer has been a difficult challenge for marketing in China. After a glamorous New Zealand brand launch or consumer experience, there was often no guarantee that consumers would be able to find the same meat at the same location the next week because the supply was controlled by distributors. In recent years most New Zealand companies have improved their control in

this area as relationships with their distributors have become more well established, or at least that is the case for the product that they are targeting towards "premium" retail and foodservice brands.

Another challenge of relying on importers includes a lack of insight into pricing, how do we know what we can charge and what price our competitors are selling at? How do we know we are getting a premium price? If we lose the sale, how do we discover why?

Losing control of our product at the border makes it more difficult to establish recognized New Zealand brands and ensure a consistent supply of these products to the right place. One thought provoked by this research is whether there is scope for large meat companies to take a more start-up-like approach with their high-end products. This would mean selling these products or brand(s) directly to the point of sale, leading to closer relationships, the ability to ensure consistent supply and to get closer to the consumer.

### In-market and consumer facing presence

In the past two years, there have been marked improvements in the presence of New Zealand meat on China's eCommerce platforms such as Tmall and JD.com. Having branded products consistently available online is key to achieving brand recognition and customer connection. Previously, where to buy New Zealand meat was a challenge for consumers to navigate due to lack of supply consistency. When a New Zealand brand ran a chef's demonstration or a restaurant VIP evening to promote beef or lamb, the product sometimes needed to be ordered in especially. The restaurant or supermarket involved may not usually have a supply of these products, but even if they do New Zealand companies may not be able to guarantee that their in-market partners would ensure continuous supply after our marketing event. In the past this has left chefs and consumers confused, even if they like the product and have a great time attending the marketing event, they were not sure how they could buy the product afterwards. Now with New Zealand meat highly available in eCommerce stores, finding a way to buy it is not so difficult. One of the catalysts to improving our eCommerce visibility was Silver Fern Farms establishing its own headquarters in China and gaining improved access to the larger eCommerce platforms. It is clear that steady improvements have been made in this area since 2019. New Zealand's red meat industry has essentially evolved from not recognising China as a destination top tier product, to understanding the scope of the opportunity for premium brands. While a lot has happened recently we are still in our infancy of exploring the premium end of the China market.

### Grass-fed Education

New Zealand industry has had a relatively large focus on educating the China market on the health and environmental benefits of grass-fed red meat. This is mostly centered around beef as both country of origin and grain-fed/grass-fed labeling is common. It is New Zealand's clear unique selling point for beef; however, we still don't measure up to our grain-fed competitors. Beef + Lamb New Zealand's Taste Pure Nature campaign is one example of the high level of investment in grass-fed education. Market research has been carried out to identify emerging trends in the China market, with some positive results suggesting the emergence of health and environmentally conscious consumers who may prefer grass-fed red meat. But can we rely on this consumer trend to evolve into a niche for New Zealand beef? Or should we invest in promoting other elements of our products by creating brands with stories or investing in lamb which already has some footing in the premium end of the market. Interestingly, of all the interviews conducted, no one talked about an example of premium New Zealand beef. Once the conversation switched to "the premium-end of the market" the focus was solely on lamb. This begs the

question of whether our main investment in marketing should attempt to educate on grass-fed in China. It makes sense that Chinese consumers will become more health and environmentally conscious, as things change very quickly there and New Zealand is well poised to supply this category of consumers. However, there are many other challenges for New Zealand companies to overcome that are unique to China, such as the eCommerce landscape and our ability to ensure the consistency of product and supply that allows us to play in the premium arena.

### The future

The complexity and lack of understanding of the China market, as well as the scale of New Zealand's meat companies have led New Zealand meat processors towards using in-market partners with a focus on selling large volumes of secondary cuts. While this is somewhat necessary, companies are becoming increasingly focused on their "premium" food service and retail brands in China. These are usually also sold via importers, however, do strong existing partnerships rule out selling a portion of product directly to customers in a different niche? Most interviewees believed there were opportunities for shorter supply chains.

With demand for red meat in China increasing and prices paid by importers rising, especially since there have been sanctions on meat trade with Australia, New Zealand is in a good position for meat processors and farmers alike. However, growth in the premium end of the market still presents many challenges and unexplored opportunities.

## Conclusions

### **What is New Zealand's red meat marketing strategy in China?**

Still largely volume based

Curiosity for establishing premium brands

There is a focus on educating the market on the benefits of grass-fed

Market research into emerging consumer trends

### **How do we target the premium end of the market?**

Our ability to capture the premium end of the market depends on our ability to produce niche and innovative products that have consistent taste and supply. eCommerce presence is important in China and New Zealand needs to be omnipresent across these platforms. We must market our products in ways that form a deep connection with consumers. Brands have stories.

## Recommendations

Based on the findings of this research project the following recommendations can be made for companies trying to capture the premium end of the red meat market in China:

- Develop niche brands with a real and unique story behind them. The story must have a human connection and connection to product taste and consistency.
- A small-scale approach to marketing "premium" brands. Starting with face-to-face relationships and scaling, with no guarantee of volume.
- Exploring avenues to sell lower volume "premium" brands directly to the end-user in China.
- Explore opportunities to sell directly to customers but contract local logistics companies to help get a product from port to market.
- Understand and use Chinese social media and eCommerce platforms to connect consumers with brand stories and link them directly to purchasing options.
- Have more New Zealand people on the ground in China building relationships and gathering market research data, rather than contracting agencies.
- While complex, there is a likely opportunity for "boutique" meat processing where products processed on a smaller scale could gain a premium for superior traceability information.



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# Appendices

## Appendix 1: Interview Questions

### Strategy

1. Can you articulate your organization's red meat strategy in the China market?
2. What brands/labels do you have that are targeting the premium end of the China market?
3. What are the key challenges to a premium positioning for NZ meat products in China? (either in retail or food service)
4. How is your organisation tipping the balance to focus on value added products vs. commodity?

### Marketing efforts

1. How do you do market research to inform campaigns?
2. What platforms / methods / agencies are used to tell your red meat story in China?
3. How are you measuring ROI of activities in market?
4. Where can Chinese consumers find your products to purchase?
5. Do your campaigns and marketing spend link to places where consumers can consistently find your products? What are the challenges in doing so?

### NZ Industry

1. How do we know that consumers recognize and understand NZ meat brands?
2. What do we (NZ companies) need to be doing now and in future to improve our success in the market?
3. Are there things that our competitor countries are doing successfully in the premium beef space that we are not? What could we do better?
4. NZ does play in the premium space with lamb, what are the challenges faced by meat companies in establishing premium lamb brands?