

PREDICTIVE PRODUCT DEVELOPMENT THROUGH PROCESS DESIGN



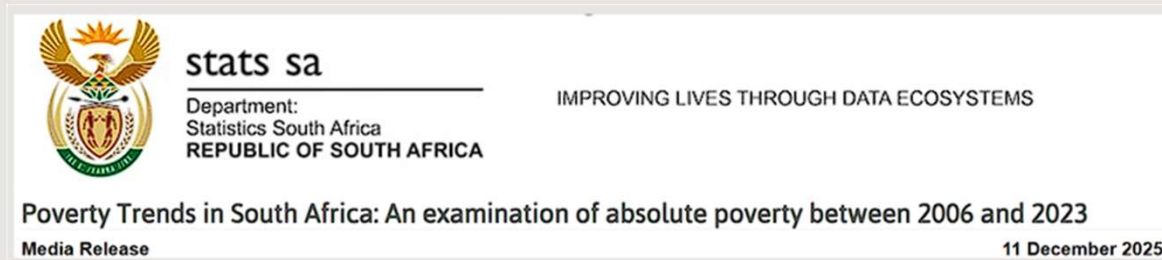


S.A. MANUFACTURED DAIRY PRODUCTS:



SA Manufactured Dairy Products	Estimated sales in SA BMI ('000 tons)	Sales To BeLN ('000 tons)	Exports to Countries Outside SACU ('000 tons)	Total ('000 tons)	Increase vs previous year ('000) ton
2022	2,101	131	52	4,306	~
2023	2,112	134	56	4,325	19
2024	2,178	135	53	4,390	65
2025	2,236	138	69	4,468	78
'25 vs '23	5.9%	3.0%	23.2%	3.3%	310.5%

SOUTH AFRICAN POPULATION



In 2023

2/3 of population lives below the upper poverty line

Approximately 40 mil of 60 mil people

Of our current population

± 1/3 can afford dairy on a daily basis

± 1/3 can afford occasional dairy consumption

± 1/3 can afford very limited dairy consumption



LEAD THE CURVE

Anticipate. Adapt. **Achieve!**

 synercore



GET CRUSHED BY IT

Passive. **Pay the price.**

LEADERS IN FOOD INNOVATION

INNOVATION SUCCESS RATES (FMCG)



FOCUS AREAS TO IMPROVE INNOVATION SUCCESS RATE

Carbs



Lactose

Fat



Butter

Protein



SMP
(Skim Milk Powder)

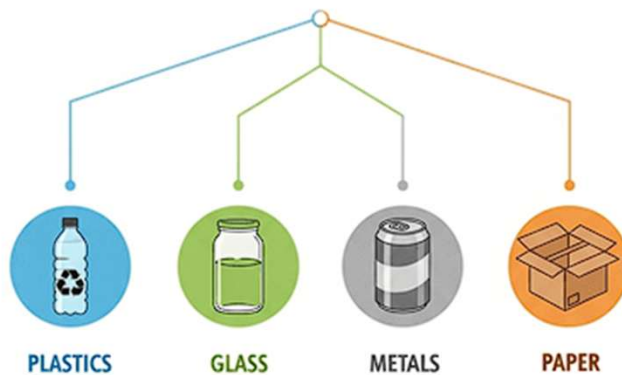
Fiber



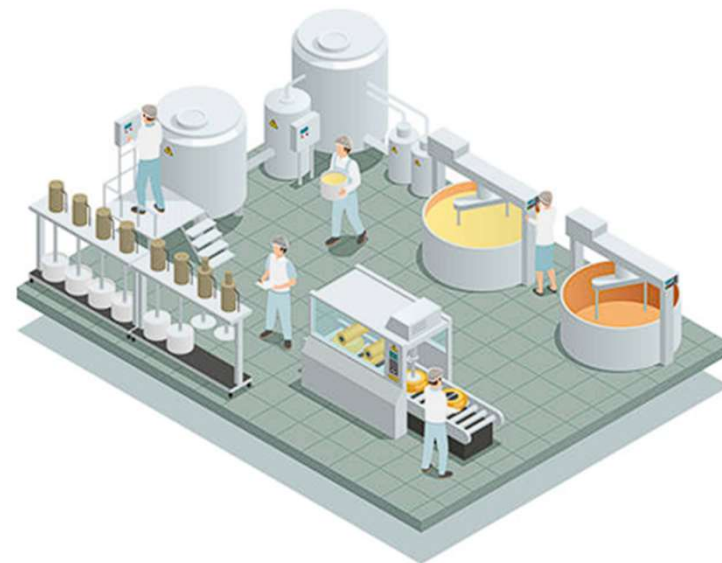
Soy
(Soy Fiber Powder)

Ingredients & Process

FOOD PACKAGING MATERIALS



Packaging & Process



Equipment & Process

EQUIPMENT SUPPLIERS: DEMOCRATIZING ACCESS

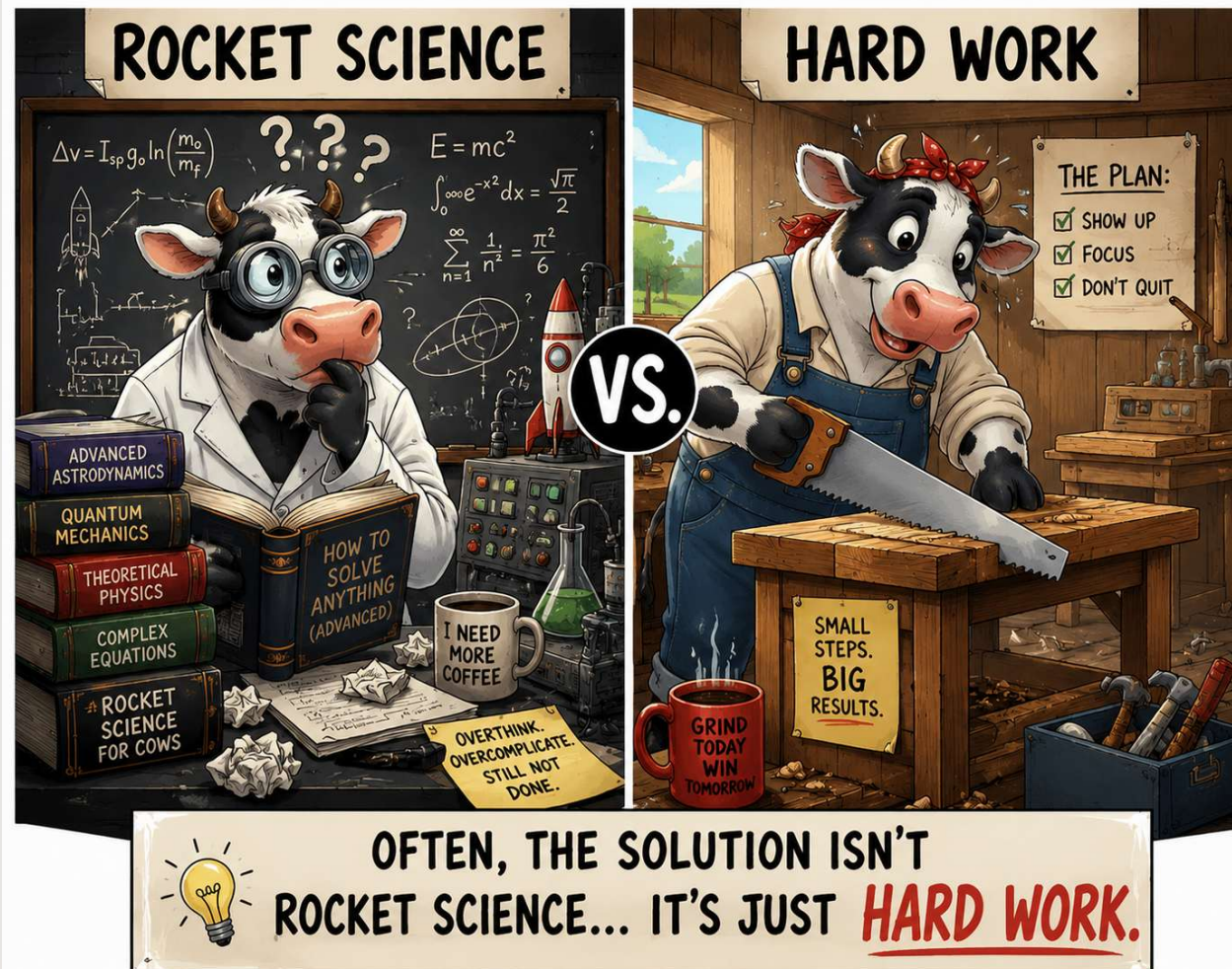
Equipment suppliers:
Find ways to **democratize**
barriers to entrance.

“...best technology...”
disrupted by
“...appropriate technology...”



FIRST 4 of 7 STAGES OF THE INNOVATION PROGRAM

1. Brief
2. Market mapping
3. Feasibility study
4. Design of trials



BRIEF: Renovation / Innovation Program

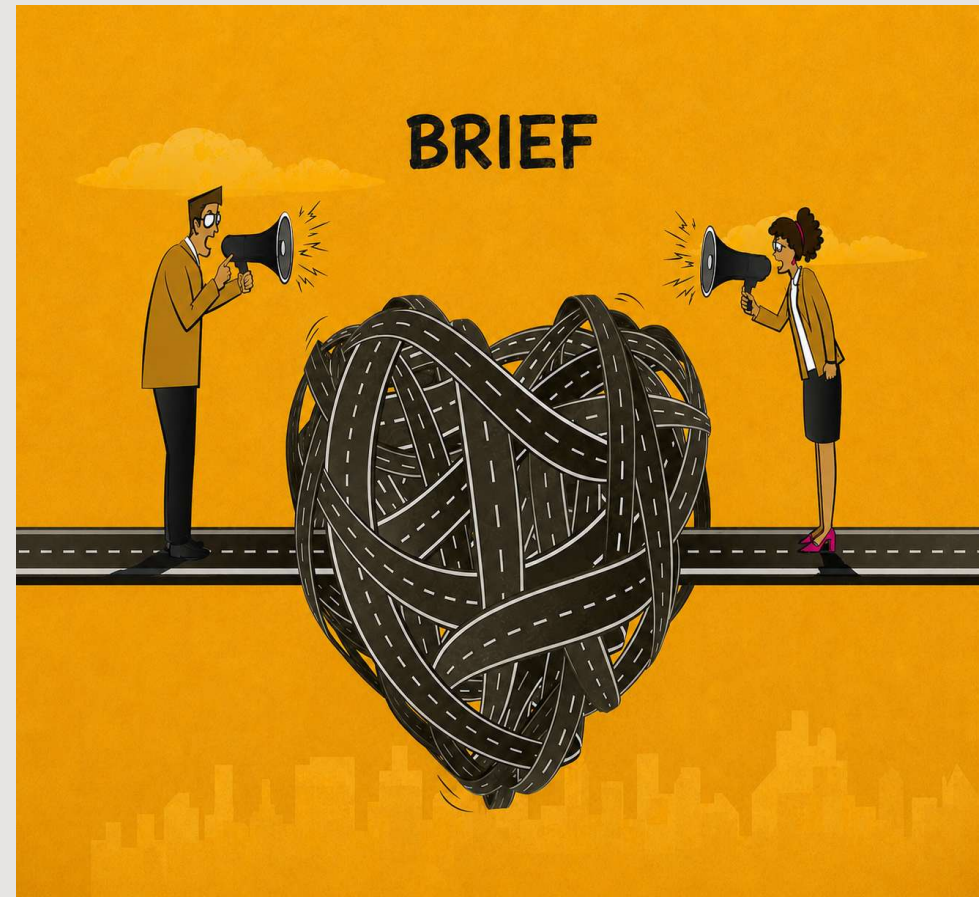
Most important concepts for the brief are

In depth understanding of

- Customer, end-user and consumer need
- Chemistry, sensory, shelf life
- Capabilities (Equipment & people)
- Cost expectations
- Clarifying a brief often is like a very tough negotiation!

Key concept:

...interrogation...

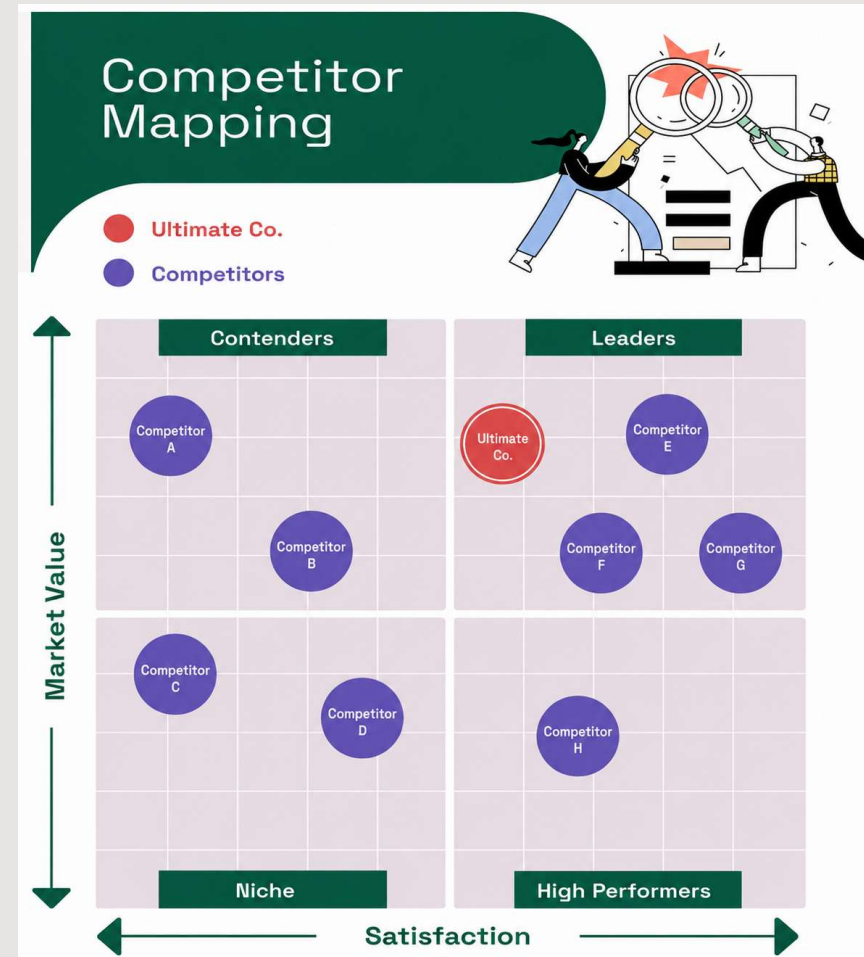


MARKET MAPPING: Renovation / Innovation Program

- Avoid imitation
- Scrutinize the market
- Identify the claims & and perceived strengths of competitors and that what they keep silent
- Identify the potential gaps where you can develop your cutting edge advantage

Key concept:

...find the gap...

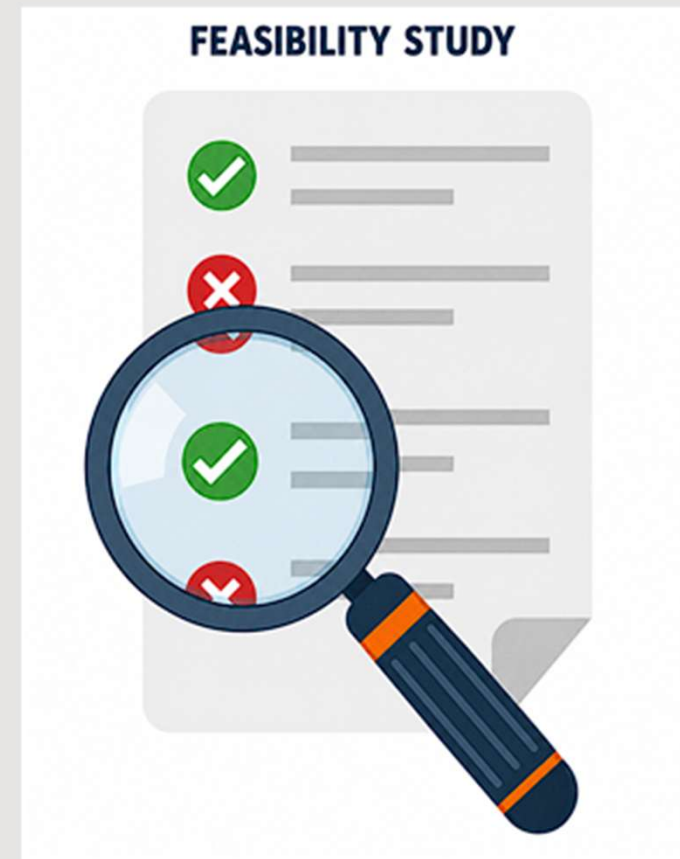


FEASIBILITY STUDY: Renovation / Innovation Program

- Scrutinize regulatory limitations and find the opportunities there
- Imagine yourself in the shoes of the customer, end user and consumer
- Investigate several options to present to your main differentiating gap
- Identify trial requirements i.e. ingredients, packing materials, equipment
- Identify generic features and cutting edge advantage

Key concept:

...the art of the possible...

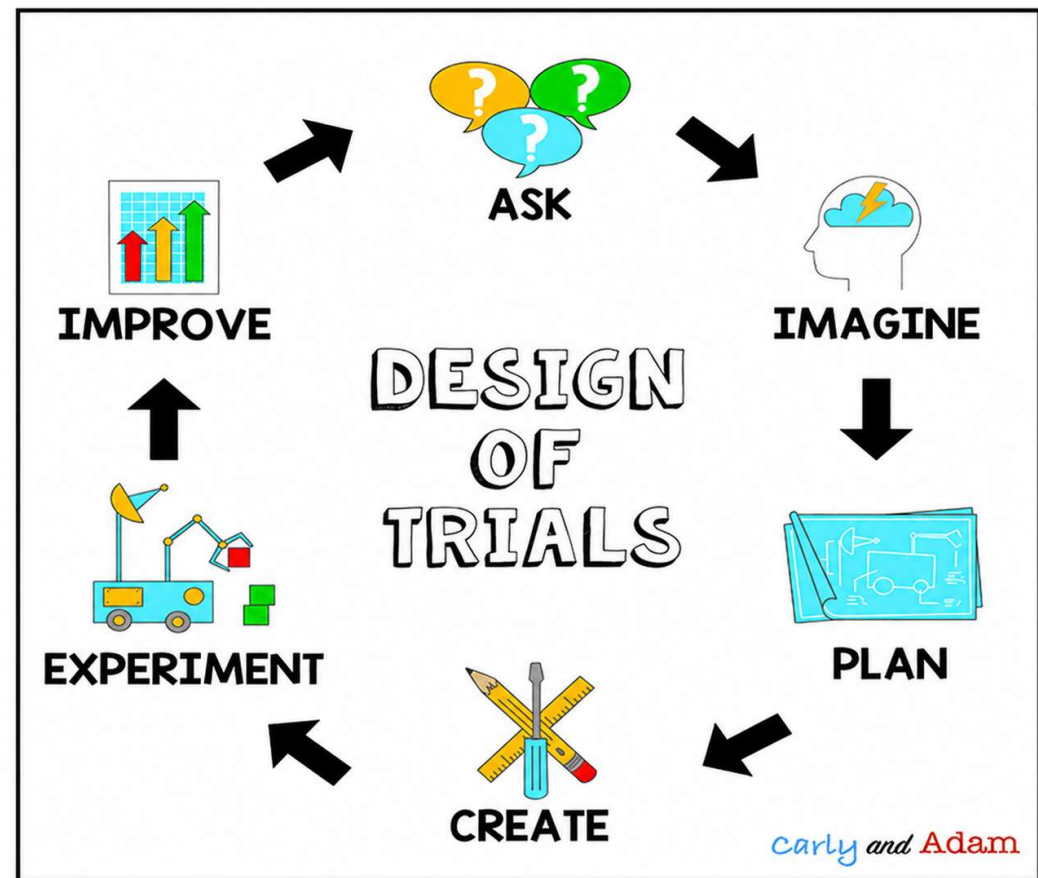


DESIGN OF TRIALS: Renovation / Innovation Program

- Plan trials and keep detailed record of each
- Test one feature at a time
- Don't be afraid to conduct many kitchen trials
- Test outstanding outcomes for repeatability
- Fine tune the best ones

Key concept:

...architect of the design...



Last 3 of 7 STAGES OF THE INNOVATION PROGRAM

5. Consumer evaluation

- Several methodologies, critical important to get regular customer, end-user, consumer feedback

6. Shelf-life evaluation and determination & travel test

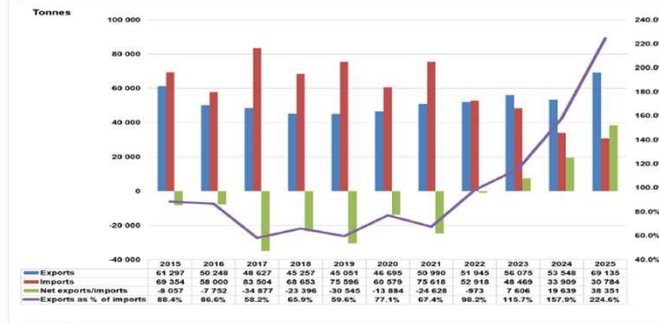
- Conduct real life cold chain fluctuations and travel tests to the furthers point

7. Post launch review

- Study both good and bad of each project to improve your NPD capability

CONCLUSION

FIGURE 5: TOTAL SOUTH AFRICAN IMPORTS AND EXPORTS OF DAIRY PRODUCTS, 2015 – 2025



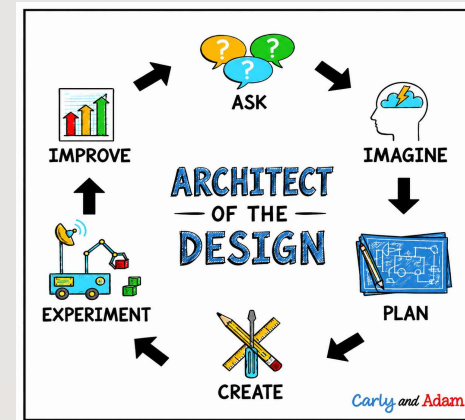
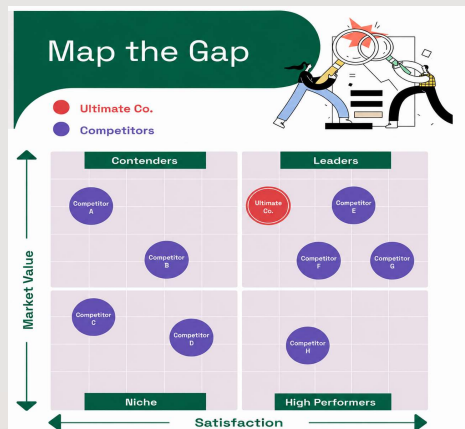
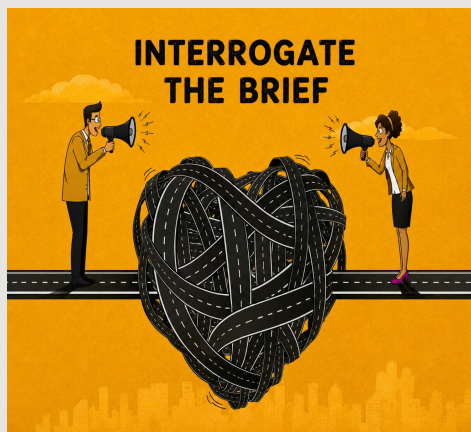
Source: SARS as supplied by SAMPRO

Of our current population

- ± 1/3 can afford dairy on a daily basis
- ± 1/3 can afford occasional dairy consumption
- ± 1/3 can afford very limited dairy consumption

Disruptive growth will come when we INNOVATE and DEMOCRATIZE

“...best practise of the developed world...” to “...appropriate practises for our developing country...”





THANK YOU

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