



“Let Food (Potatoes) be your Dutch Medicine”  
马铃薯食品，您的荷兰良药



WHAT WE WANT  
我们需要什么



Potato Trade Mission P.R. China, April 2010  
荷兰马铃薯访华代表团 2010年4月



What We Want 我们需要什么



**(What)** Part 1 - Key drivers challenging the food industry  
(什么) 第一部分—食品工业主要驱动力

**(We)** Part 2 - Key needs food companies  
(我们) 第二部分—是食品公司的关键需求

**(Want)** Part 3 - Strategies for innovation  
(需求) 第三部分—创新策略





1 - Key drivers "WHAT"  
"什么" 是主要驱动力

I - Consumers 消费者

II - Society 社会

III - Distributors 分销商

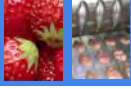


I - consumers  
消费者

Changing  
consumer  
consumption  
patterns  
ICT tools

改变消费者消费方式  
信息通讯技术工具





WHAT WE WANT

Changing attitude of the consumer, drives the global food industry!  
改变消费者态度，推动全球食品工业



Potato Trade Mission, P.R. China, April 2010

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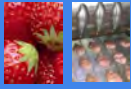
WHAT WE WANT

Food and food consumption patterns 食品及食品消费方式

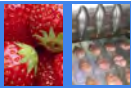


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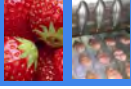
Food consumption patterns 食品消费方式



ICT-tools and e-commerce changing the marketplace as we know it today

信息通讯技术工具和电子商务正改变已知的市场地位

Economic descriptor	Industrial economy	e - Economy
Socio-political paradigm	Paternalistic/hierarchical	Democratic/self-organizing
Regulatory environment	Interventionist/protective	Laissez faire
Geographical scope	Domestic/regional	Global
Transportation	Auto/plane	Virtual
Technology enabler	Combustion engine	Intelligent network
Underlying value driver	Labor/capital	Knowledge
Market structure	One to many	Many to many
Relationships	Few/long term	Many, changing, ad hoc
Optimal business model	Vertical giant	Value network dominator
Value chain structure	Parallel full service generalists	Networked specialist
Economic focus	Single company/ single industry	Multiple companies/ X-industry company
Relevant life cycle	Product	
Competitive advantage	Automation	Networking, knowledge sharing



### New rules – new tools 新的规则 – 新的工具

- ❖ No one gets paid until the customer pays
- ❖ 只有顾客付费后，有关各方才能拿到钱
- ❖ Transparency
- ❖ 透明化
- ❖ Availability at point of “desire” - defines value
- ❖ 只要是顾客“想要的”，就有货 – 已成为价值的定义
- ❖ Duplicates no existing infrastructure
- ❖ 不重复现有的基础设施



### II – Society 社会

- ❖ Trends in society 社会发展趋势
- ❖ Trends in society re food 社会对食品方面需求的趋势
- ❖ Trends in food industry 食品工业发展趋势
- ❖ Government impacts 政府的影响
- ❖ Improving population health 改善人民健康



### Trends in society 社会发展趋势

- ❖ Ageing population 人口老龄化
- ❖ Growing high(er) income population 人们收入增长
- ❖ A wealth of choice 人们有了众多的选择

Changes in lifestyle and dietary patterns have increased the incidence of chronic non-communicable diseases including:

生活方式和饮食方式的改变，增加了包括慢性病和非传染性疾病的发病率：

**Obesity 肥胖**

- Cardiovascular diseases 心血管疾病
- Hypertension 高血压
- Diabetes mellitus 糖尿病
- Certain cancers 癌症



### Trends in society with respect to food 社会对食品方面需求的趋势

- ❖ The function of food is changing 食品的功能正发生变化

**WHAT** we eat: calories → "experience" → nutrition & health, variety

**WHEN** we eat: regular meals → grazing and snacking

**WHERE** we eat: in-home → out-of-home

**WITH WHOM** we eat: social → individual

**HOW WE PREPARE** our food: from scratch → ready-to-eat, heat and eat

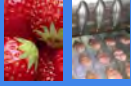
- ❖ A wealth of choice 人们有更多的选择

Primary production: year round, global supply

Food industry: preserved, frozen, chilled, freshly prepared

Role of retail

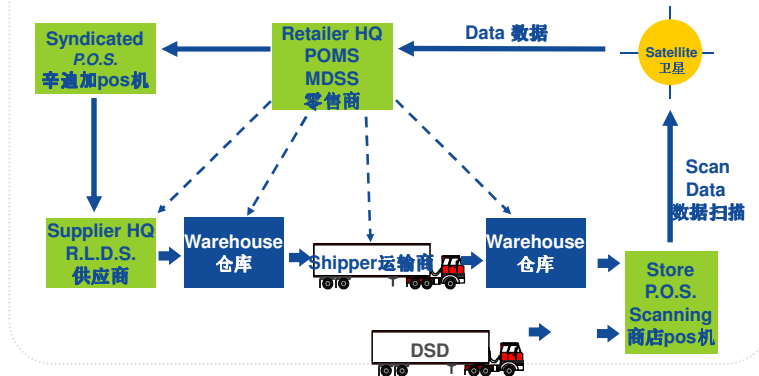
Out-of-home

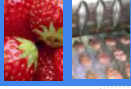


### Mass Merchandisers 大卖场



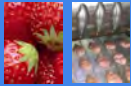
### ICT technology provides real time feedback and item level control 信息通讯技术工具提供实时反馈和项目水准的控制



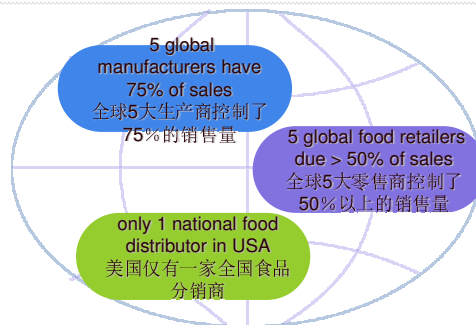


### Retail link – new and improved 零售链 – 又新又好

- ❖ Internet access allows greater flexibility  
互联网接入有了更大灵活性
- ❖ Ability to write hard P.O.S. 可用POS机结帐
- ❖ Follows through on many consumer focused initiatives  
出台许多顾客至上的新措施
- ❖ Vendor is now the link between merchandising and replenishment  
卖主成了供应商与后勤补货之间的纽带
- ❖ Vendor can make more accurately support geographically, specific promotions and micro-marketing 卖主可在地理位置上提供更准确的支持，进行具体的促销活动和微观市场营销

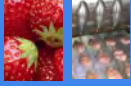


### Consolidation continues 市场在继续整合



### Manufacturers, retailers and distributors - year 2008 制造商、零售商和分销商- 2008年





### Wheel of retailing 零售之轮

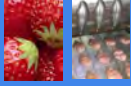
Store formats are evolving 商店的格式正发生演变

- ❖ Fresh fields / whole foods 鲜货区/全食品
- ❖ Club concept will change 会员制概念将改变
- ❖ Superstores / super warehouse stores 超市/超级仓式商店
- ❖ Culture oriented stores 文化特色商店
- ❖ Virtual reality retailers 虚拟现实零售商



### Shift of power to the retailers 权力转移到零售商

- ❖ Requires multi-channel strategy
- ❖ 需要多渠道战略
- ❖ Owns vital marketing information
- ❖ 拥有重要的营销信息
- ❖ 70 - 80% Buying decisions: P.O.P.
- ❖ 70 - 80 %的购买决定：通过购物点广告做出的
- ❖ Closest to the consumer 与消费者最接近
- ❖ Co-marketing 联合市场营销



### Supply management 供应链管理

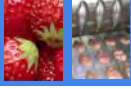
- ❖ Continuous replenishment / flow through
- ❖ **连续的补货/流通**
- ❖ Changing logistics systems
- ❖ **不断改变物流体系**
- ❖ Cross docking, bar coding, DSD – consolidation points, consumer focused P.R.
- ❖ **交叉装卸, 条形码, DSD – 整合点, 重点对消费者公关**
- ❖ Business to Business, biggest opportunity
- ❖ **企业对企业, 最大的机会**
- and
- ❖ **ECR = Effective Consultant Rip off**



### 2 - Key needs of food companies “WE”

“我们”是食品公司关键的需求

- ❖ Market led approaches
- ❖ 以市场为导向
- ❖ Food supply chain
- ❖ **食品供应链**
- ❖ ICT society
- ❖ **信息和通信技术的社会**
- ❖ Intelligent automation
- ❖ **智能自动化**



### New marketing approaches. Transitions in marketing philosophy over the next 10 years. 新的市场营销方式。今后10年营销理念将会发生转变。

#### From 从旧的理念

- Store and locations as greatest assets
- "One to Many" mass marketing
- Transactions and traffic flows
- SKU's and product profitability
- Offering a product range
- Single channel access
- Right product, place and time
- A monolithic customer offer
- Data on what is bought
- Marketing as an "add-on" department
- No one in the organization (except CEO)
- Benchmarking
- Customer loyalty schemes

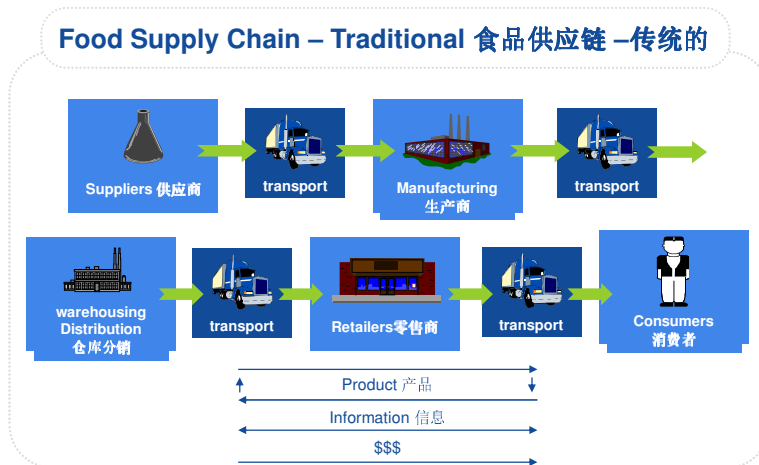


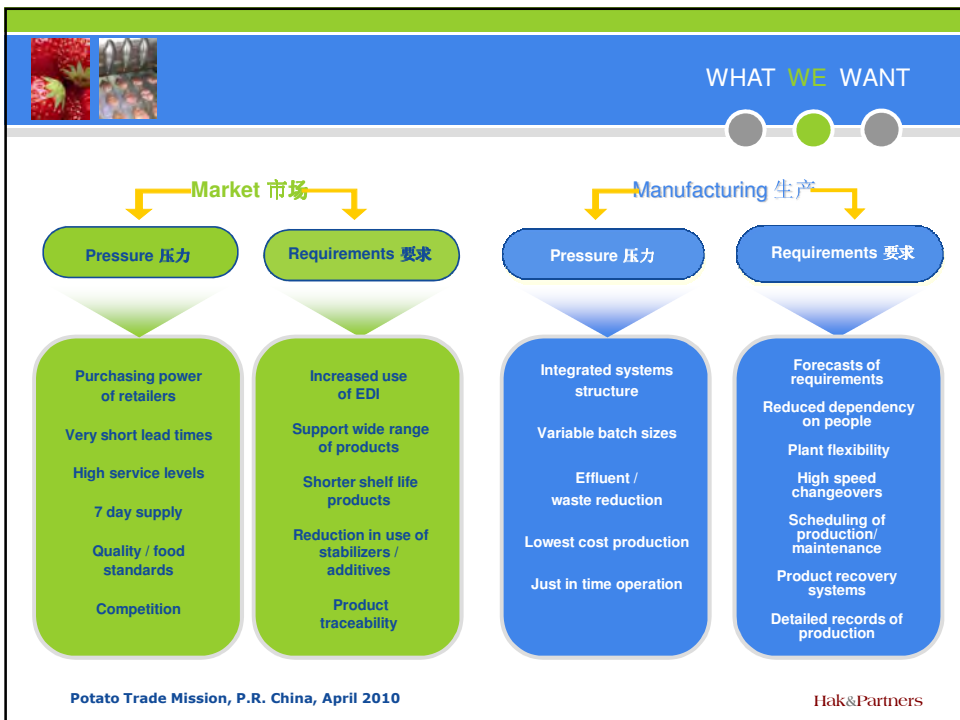
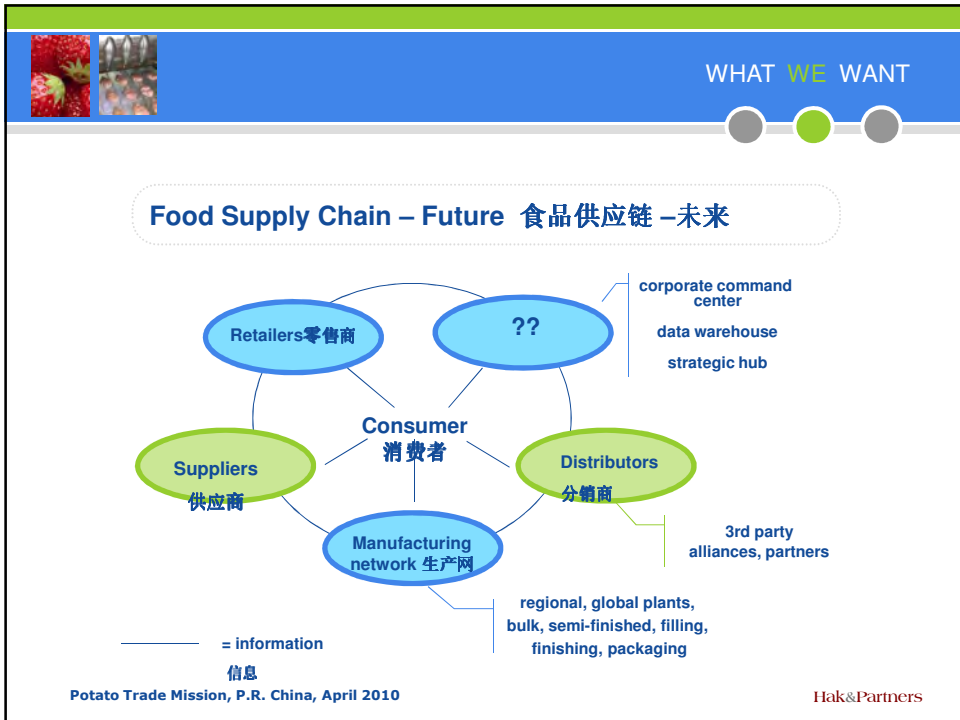
#### To / As well 到新的理念

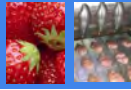
- Customers as greatest assets
- "One to One" mass customization
- Customer lifetime value
- Customer and market basket profitability
- Offering solutions and an experience
- Multi-channel access
- Anything, Anytime, Anywhere (Multiple relationship options)
- Knowledge on what is bought by whom and why
- Marketing as a core competence
- Customer-centric forms of organization
- Path breaking
- Customer loyalty as the creed of business



### Food Supply Chain – Traditional 食品供应链 – 传统的







### Trends and needs 趋势和需求

Market 市场	Organization 组织	Product 产品	Information 信息
Decisive 决定	Flexible 灵活	added value 增值	Fast 迅速
cost reduction time to market product flexibility	head-tail co-development self regulating	product support maintenance control	design tools 3d models configuration management
↑ trends 趋势 ↓ ↑ needs 需求 ↓			
enterprising market-oriented methodic communicative	project engineering marketing / innovation cost engineering it knowledge	life cycle analysis and design design optimization	
problem solving 解决问题	multi-disciplinary 多学科	Integralist	
Attitude 态度	Knowledge 知识	Profile 简介	



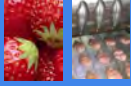
### ICT society 信息和通信技术的社会

- ❖ From destiny to uncertainty 从认命到不确定性

*power of flows  
takes precedence of the flow of power  
流动的权力能优先使权力流动*

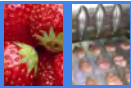
- ❖ Increasing 提高

*productivity through innovation  
通过创新提高生产力  
competiveness through flexibility  
通过灵活机动的方法提高竞争力*



### ICT and intelligent automation 信息和通信技术和智能自动化

- ❖ Reducing costs 降低成本
- ❖ Improving quality 提高质量
- ❖ Increasing flexibility 增加灵活性
- ❖ Integrating manufacturing operations with business systems  
生产制造业务与商业系统相结合



### 3. Strategies for innovation “Want”

“需要” 是创新策略的出发点

- A Dutch (EU) Vision 荷兰（欧盟）的展望
- B. Food Quality & Manufacturing 食品质量和制造
- C. Methodic Innovation 有步骤的创新

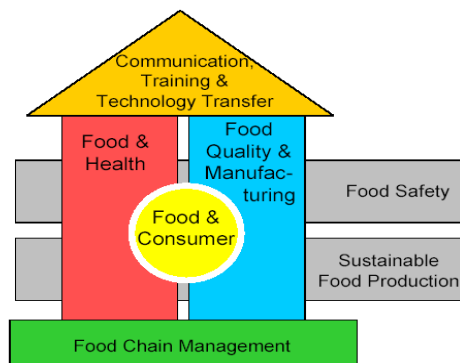


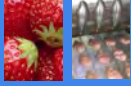
### A. Dutch (EU) Vision 荷兰（欧盟）的展望

- ❖ Innovative, novel and improved food products for, and to, national, regional and global markets in line with consumer needs and expectations. 根据合消费者需求和期望，为本国，区域和全球市场生产并提供创新的、新颖的、优质的食品
- ❖ Positive impact on public health and overall quality of life (“adding life to years”). 积极影响公众健康和总体生活质量（“使人延年益寿”）
- ❖ Global business leadership securely based on economic growth, technology transfer, sustainable food production and consumer confidence. 公司在全球领先的地位是牢固建立在经济增长，技术转让，可持续食品生产和消费者信心的基础上的



### Technology Platform “Food for Life” “粮食拯救生命” 技术平台





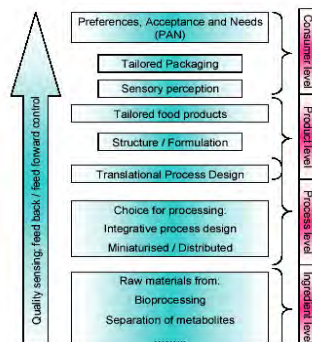
## B. Food Quality & Manufacturing 食品质量与制造

### Key success factors 成功的关键因素

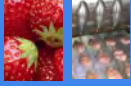
- ❖ **Improved Innovation System:** deliver real products faster  
**良好的创新体系：更快提供实际产品**  
 - Impact on lifestyle changes - **对生活方式改变的影响**  
 - From products to diet - **从产品到饮食疗养**
- ❖ **Preference, Acceptance and Needs** of the consumer (pleasure, health, performance) at the heart of the developments: Directs all steps in the food production process. Reverse engineering.  
**消费者的偏好、接受和需要（快乐、健康、性能）发展的核心：指导食品生产过程的所有环节。逆向工程技术。**
- ❖ **Robustness of New Technologies:** applicable to various commodities. SMEs can use local biodiversity to produce and possible export a diversity of niche products.  
**新的技术鲁棒性（健壮性）：适用于各种商品。中小型企业可以利用当地的生物多样性产生和出口的多样具有独特优势的产品。**



## Development Levels 发展水平





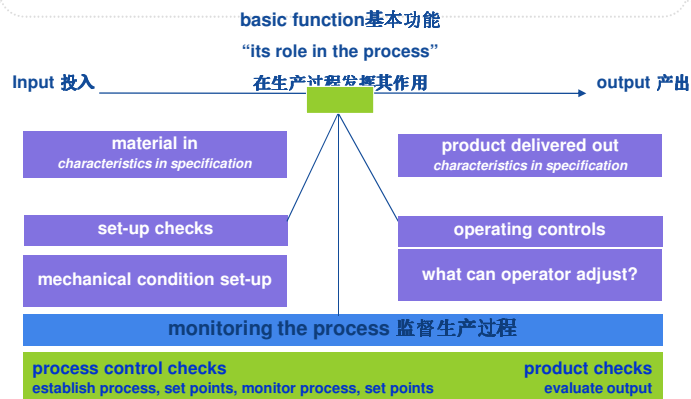


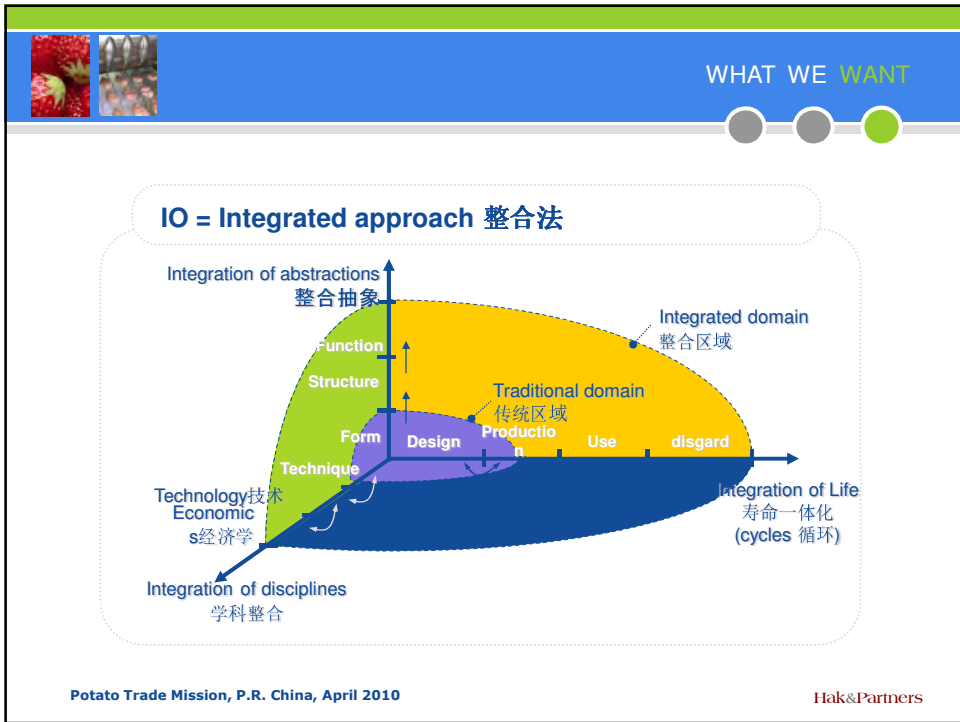
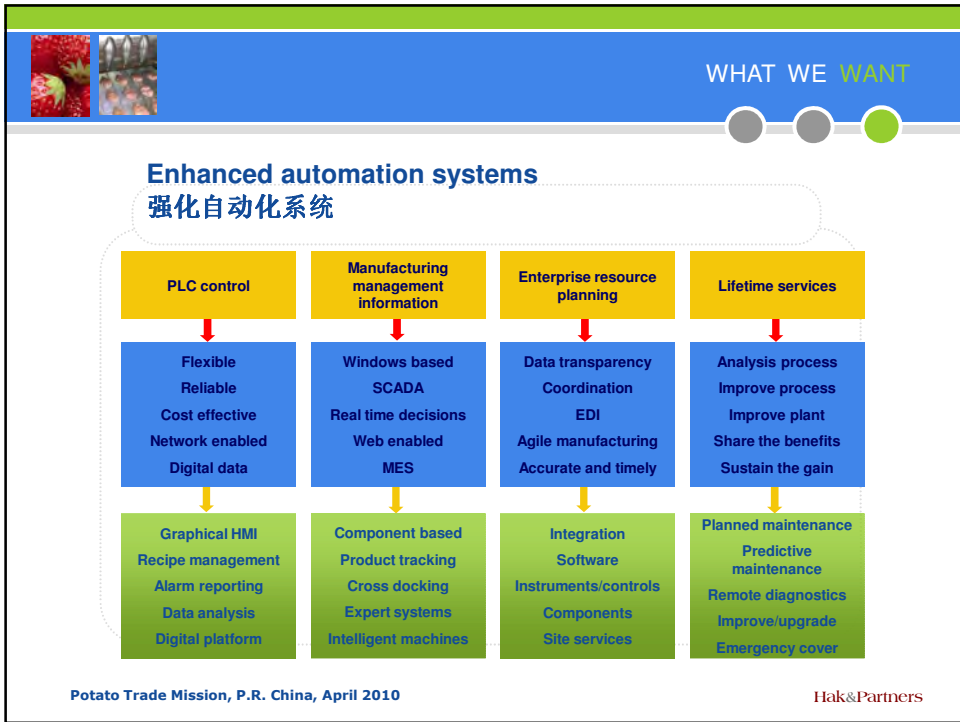
**C. Methodic Innovation = M.I.**  
**有步骤的创新 = M.I.**

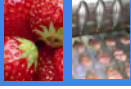
- ❖ Control point management system 控制点管理系统
- ❖ IO Approach and Compass 整合法和罗盘
- ❖ MI Approach 有步骤的创新法
- ❖ Semantic wave 语义波



**Control point management system incl. HACCP**  
**控制点管理系统, 包括 HACCP认证**





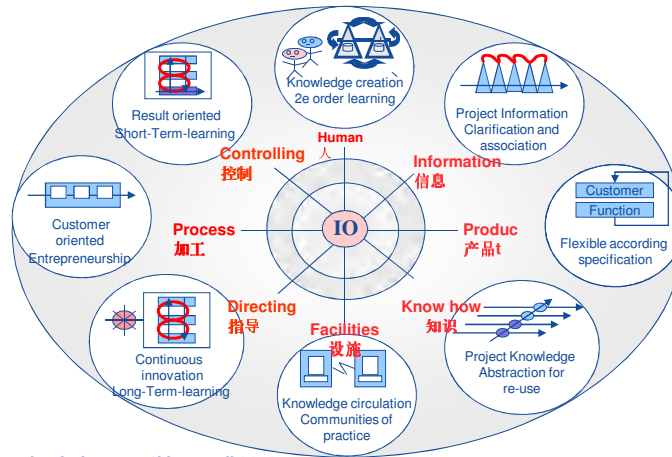


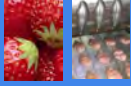
IO Compass 整合法罗盘



IO Translation (What) Breakdown of complexities

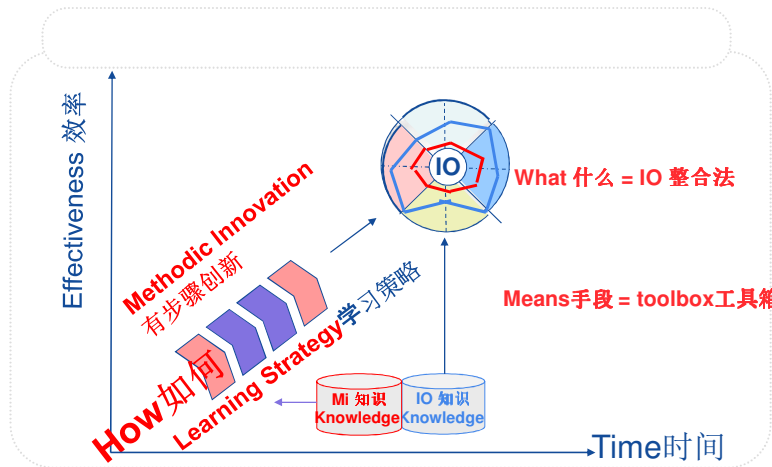
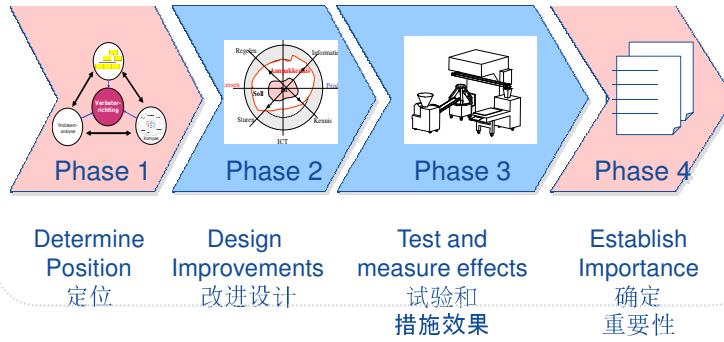
整合法解释了“需求什么”，将复杂的问题进行分解





ICT and Intelligent automation 信息和通信技术和智能自动化


Coaching innovation 培育创新




WHAT WE WANT

### Generic Innovation Toolbox 通用创新工具箱

**Development 发展**



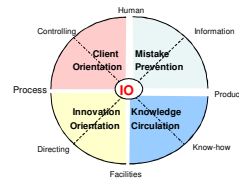
**IO-implementation 执行**



**Master 主持**

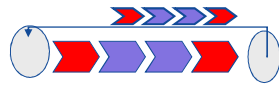
Education 教育

**Implementation 执行**




**Direction 方向**

Dialogue 对话



Methodic Innovation 有步骤创新

**Securing 确保**



Regional 地域性

Learn innovating together 共同学习创新

International 国际

平台 Platform - IO  
学术 AcadeMi - IO

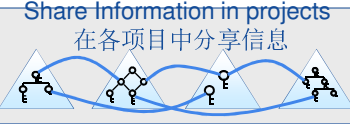
Certification 认证

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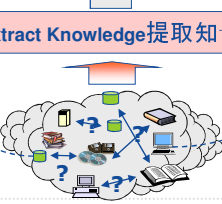
WHAT WE WANT

**Information- scores high 信息- 得高分** Semantic wave 2006 Mill Davis

**Share Information in projects 在各项目中分享信息**




**Extract Knowledge 提取知识**



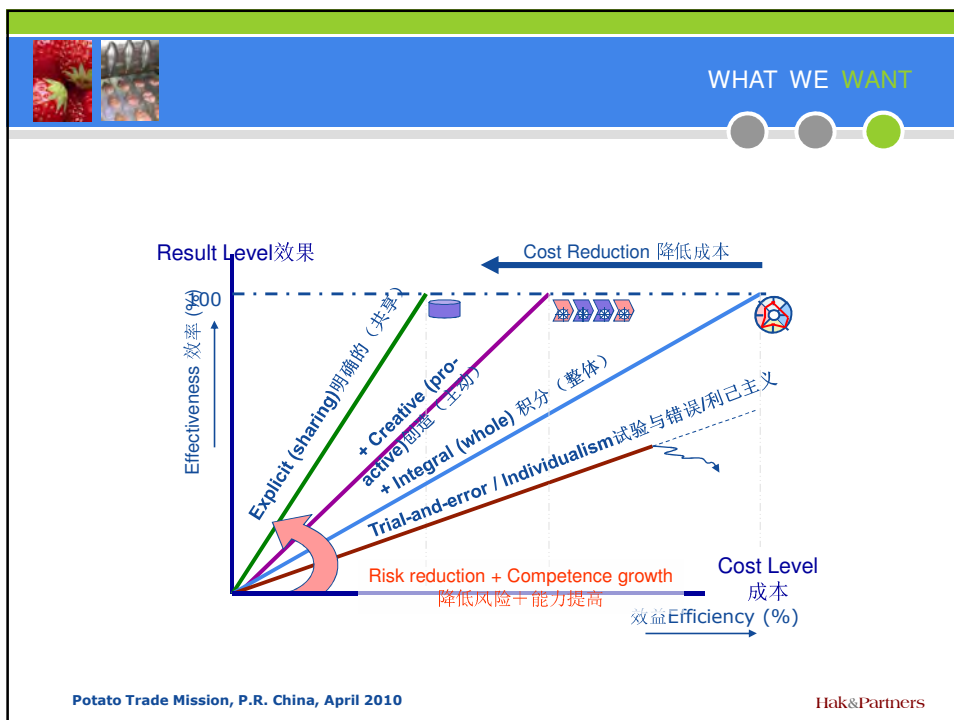
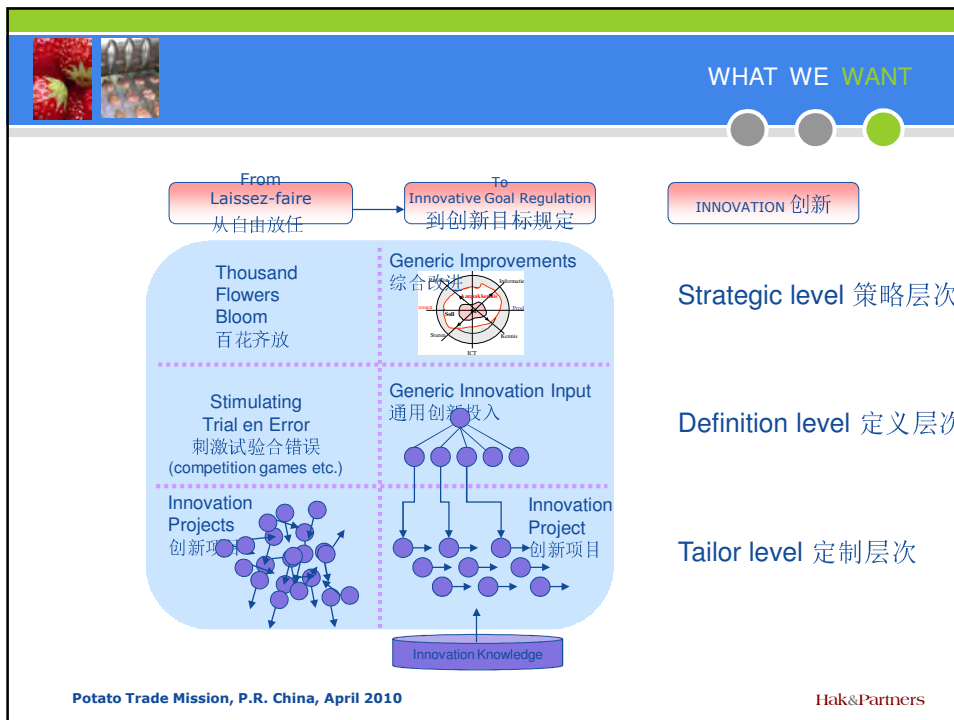
**Knowledge Awareness Implicit 固有的知识意识**


**Semantic Modules 语义模块**



**Documents 文件**

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WHAT WE WANT

### Example: Fruit and Vegetables chain 实例: 果蔬产业链

	Quality and yield	Supply planning	Supply chain management	Image of brand
<b>CRM</b> (customer relationship management) Grower database Segmentation Location	<b>Yield / Quality</b> Crop program Monitoring Diseases prediction Processing effects	<b>Harvest</b> Harvest timing Logistic systems	<b>Traceability</b> QMS = Quality Management System	<b>Sustainable AG</b> Product benefits ICM
<b>Grower support</b> Eurep Gap training Stewardship Field force presence Global reach	<b>Residues</b> MRL database Degradation curves Qualimetre Weather	<b>Volumes</b> Satellite images Weather forecast	<b>Farm recording</b> FMS = Farm management supply	<b>Stewardship</b> Field support
<b>Processor support</b> GMP training Field force assistance	<b>Planning</b> ICT-data Marketing feed back	<b>Quantity and quality</b> ICT-data	<b>Post Harvest recording</b> Overall planning data	<b>All round service</b> Market orientation
<b>Technical support</b> Crop programs + protocols Monitoring Spray windows Post harvest	<b>Application</b> Nozzles Advice Seed treatment	<b>Tools</b> Produce tracker		<b>Global brand / variety</b> Transparency Certification
<b>Economics</b> Risk management Balance supply + demand	<b>Genetics</b> Varieties	<b>Quality Management</b> Data hub		<b>New attributes</b>

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# Thank You for your patience!

Ir. Jan Hak  
杨哈克

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