



# 2013 Annual General Meeting

Alastair Hulbert  
Chief Executive



# Brief Background



Over 20 years Industry Experience

All sectors of Industry, Growing, Operations, Retail, Export

International experience in USA

Founding shareholder of, and lead global expansion in  
T&G export arm Delica

T&G Senior Management since 2007



# Looking Forward



Expand Global Operations.

Fast Growing Asian Markets

PVR Fruit Varieties

The Customer and Grower is central to all decision making.



# Highlights YTD



May 2013 Year to Date Profit before Tax is substantially better than last year's

The main reasons are:

- Favourable apple season with higher volumes and higher in-market prices
- Strong performance from Australian companies Delica Australia and Delica Domestic
- Reduced cost, mainly restructuring, consultancy and depreciation
- One-off gains from the sale of two assets
- Lower interest cost



# Colin Lyford

## General Manager - Domestic Markets

### June – Quick Facts

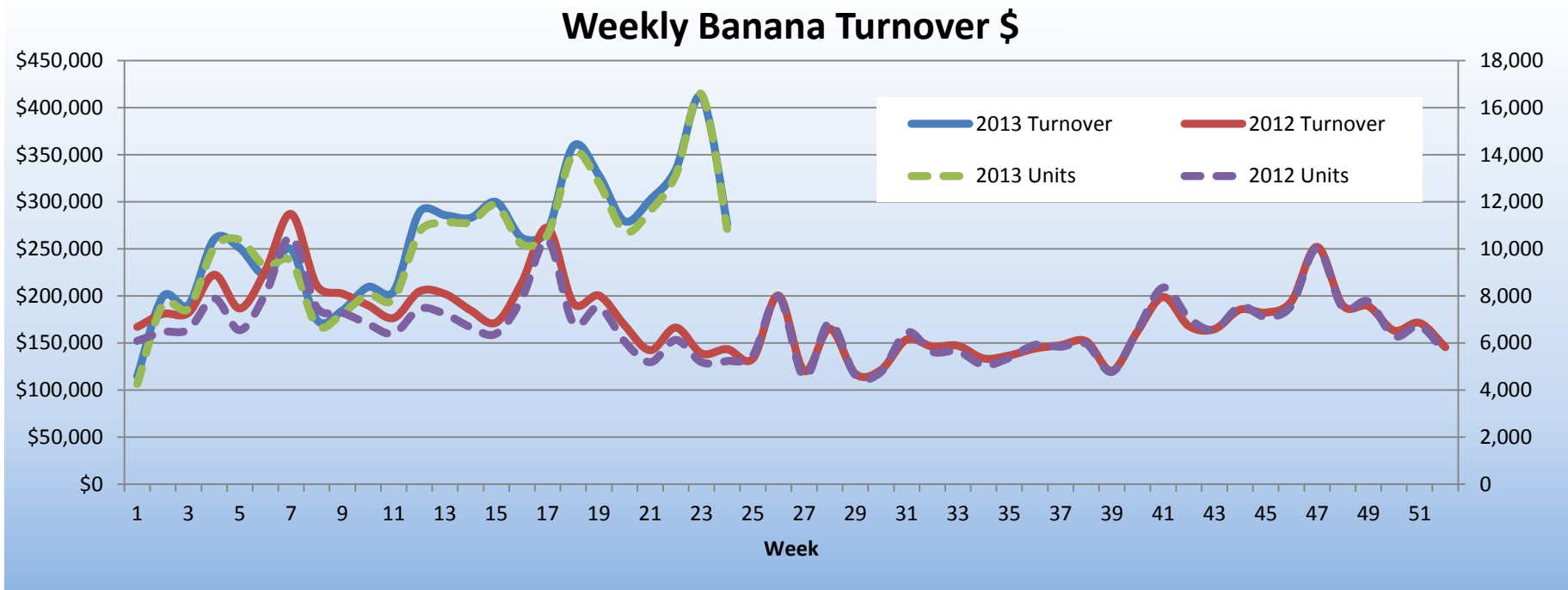




# YTD Highlights - Domestic



- Banana Revenue up 17 % On Last Year**



Over all - \$4.2 million up in TO on Last Year



# YTD Highlights - Domestic



- Focus areas are on track for growth – Food Service segment.
- Key Food Service Customer business increased by 35.7 % on same period last year

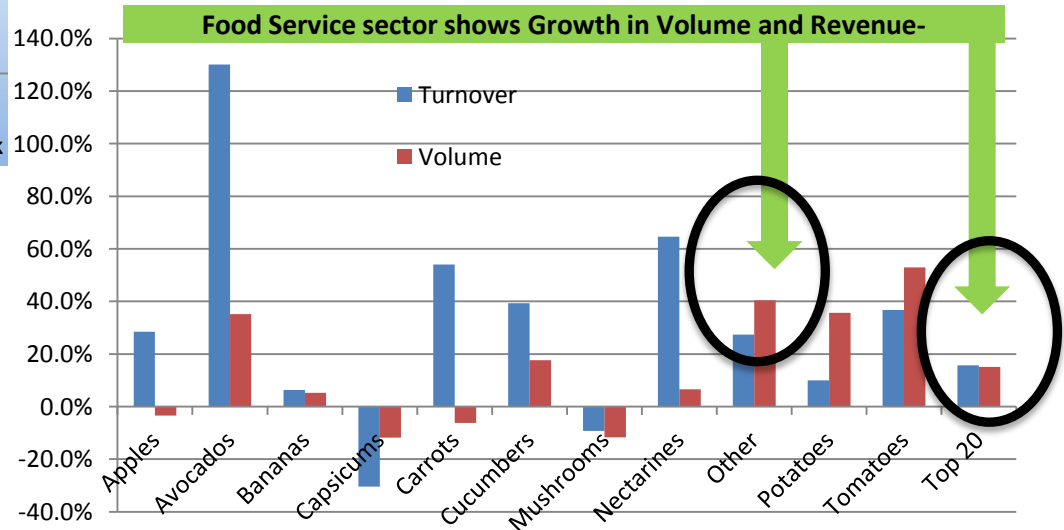
## Food Service customer Growth \$



- Top 20 product lines show growth of
  - 7 % Volume and 8% Value
- All other lines show growth of
  - 40% Volume and 29% Value

## Top 10 Products.

## YTD Growth vs 2012

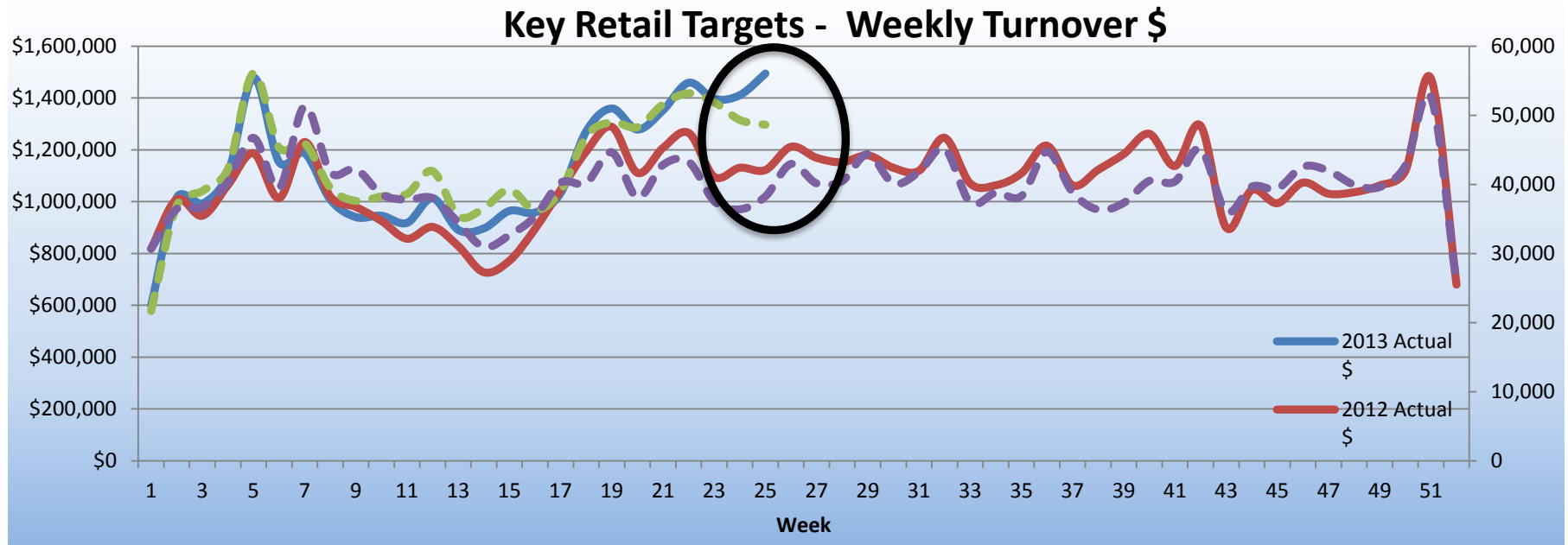




# YTD Highlights - Domestic



- Focus on Retail Growth sees targets being met.

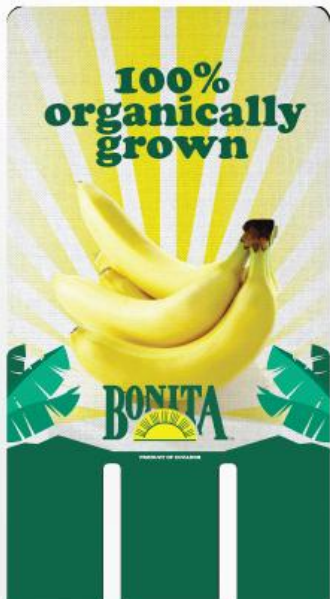


- Growth is 13.3% on last year with selected retailers.
- 1/2 this growth is from Bananas.



# YTD Highlights - Domestic

**t g** Turners & Growers





# Apples

AGM 27<sup>th</sup> June 2013



# Apples



- GVDP\* & PVR\*\*
  - Variety selection based on taste & performance
- Supply Chain Management
- Global Sales & Marketing
  - Asia, Nth America, UK, EU
- ENZA Foods
  - \* Global Variety Development Programme
  - \*\* Plant Variety Rights



# GVDP\*

\* Global Variety Development Programme



- **ENZA's Unique GVDP Model**

- Controlled, consistent & planned development
- Confidence to invest in building value
- Research programme – growing, packaging & cold chain...



# Global Reach - Growing



	USA	UK	EU	KR	CL	RSA	AU	NZ
Jazz	✓	✓	✓		✓	✓	✓	✓
Envy	✓	✓	✓	✓	✓	✓	✓	✓
Pacific Series	✓							✓



# Global Reach – S & M



	USA	UK	EU	ROW	SAM	RSA	AU	NZ
T&G/ENZA	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assoc. Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
Licensee				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	



# The Jazz™ Apple Big Crunch

## 10<sup>th</sup> May 2013

**t g** Turners & Growers





# Results



- Broke the world record!
- 17,064 children sampling Jazz™
- Created a very positive brand experience for kids, families and schools
- Generated 39 newspaper articles often featuring outstanding headlines & photo's with media equivalent of >\$140,000
- Helped drive 60% increase in Jazz Snackers through May
- Take it global...





# Jazz™ Global Campaign Refresh 2013



- Brings to the fore the Jazz™ taste and texture experience with attitude
- Builds on Jazz™ brand equity by injecting more movement and using 'pop art' graphics to visualize the crisp, tangy/sweet, nature of Jazz™





# UK: BBC Good Food Show





# EU: Belgium





# envy™ Global Campaign Refresh 2013



## Key points to cover

- ‘Foodie/ Fashion magazine’ seeks to communicate the sophisticated, feminine, and indulgent brand values of envy™
- Design intended to replace European starlet visual that didn’t work in Asian markets





# NAM: Envy

