Foods from Spain:

Actionable Lessons for Success in the US Market from Emerging Brand Case Studies

Prepared for Trade Commission of Spain in New York (ICEX)
by Vdriven Consulting

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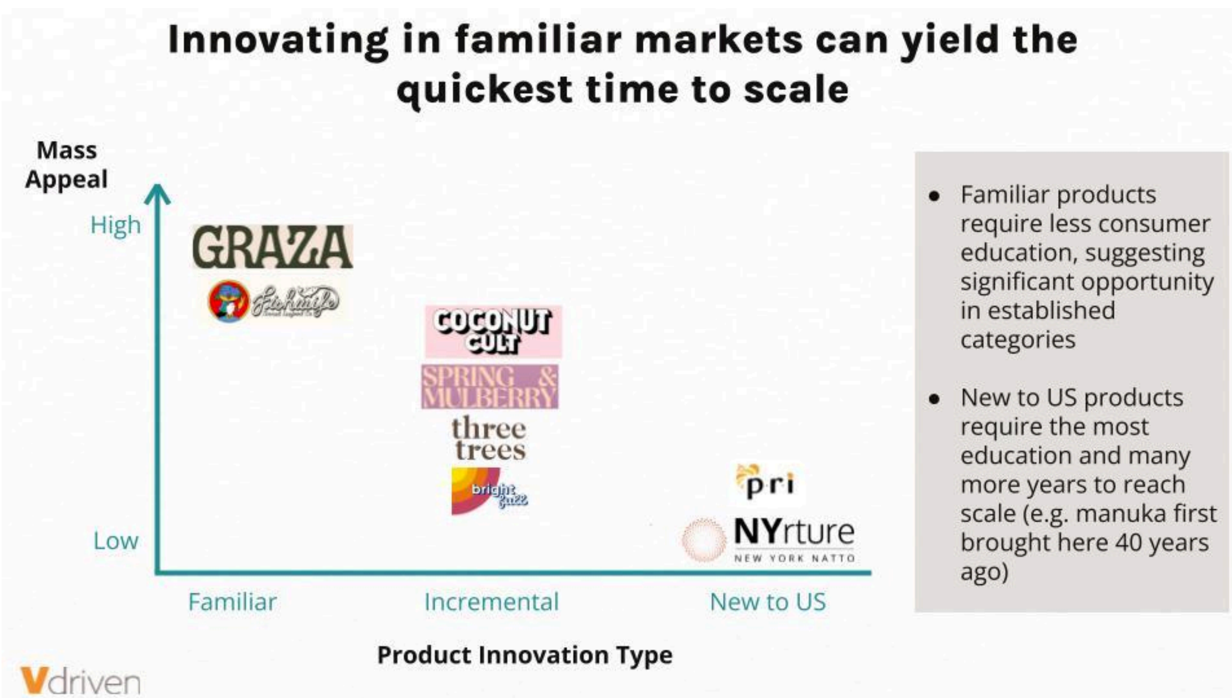
Executive Summary

Executive summary: Recommendations for emerging food brands to succeed in the US

- **Challenge conventional wisdom:** contrarian ideas often bring the greatest opportunity. e.g. canned fish can be exciting.
- **Do something that is novel** for your space, such as packaging, storytelling, positioning, product, or route to market.
- **Launch bullets before cannonballs:** start small; test and refine ideas, products, fit, and messaging to develop a winning formula before investing in expansion. Failing in large-scale US retail is very expensive.
- **Niche-in at the beginning:** find the group with whom your product resonates and build out from there.
- **Develop a tailored route to market:** having a product available for purchase in the US is not enough to drive sales; create granular plans by channel, by geography, and by segment.
- **Choose your partners carefully:** successful companies recognize their core competencies and choose experienced local US partners, e.g. design, importing, marketing, distribution, and brokerage.

Executive summary: food case studies

- We prepared case studies of 8 companies (6 food, 1 beverage, 1 supplement company) to highlight challenges and routes to success in the US market.
  - 4 of these companies are domestic and 4 are sourced abroad.
- We analyzed these cases along four key success factors: product & differentiation, brand & positioning, promotion, and distribution.
  - Each success story used innovation to differentiate in one or more of these dimensions.
- Successful products fell under three broad themes:
  - **Familiar or traditional products** with innovative branding and marketing to appeal to new consumers or channels (e.g. Fishwife, Graza).
  - **Incremental changes/innovation** to an existing product or category, to attract a loyal niche and then expand (Brightfull, The Coconut Cult, Spring & Mulberry, Three Trees).
  - **New to US** products introduced to the US market for the first time (NYrture, PRI).



Food case insights (1/2)

Company	Category	What they did	Insight	Origin
	Supplements	Redesigned product and packaging; sought specialized partners for regulatory compliance and feedback from retailers	What works in another country may not work in the US - need to be willing to iterate	Colombia
COCONUT CULT	Coconut Yogurt	Created a novel niche in a crowded shelf space with extremely high probiotic content and relatable social media	Lean in to authenticity and emotional connection with the brand to drive scale	US
	Tinned Fish	Introduced Iberian premium tinned fish and seafood with brash branding in the previously staid segment	Even in the most seemingly traditional categories there is room for innovation	Spain & Portugal
GRAZA	Olive Oil	Used packaging to simplify purchase based on functional use case, while bringing a premium product to mass market	Put yourself in the mind of your consumer and how they interact with your product in real-world settings	Spain

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Food case insights (2/2)

Company	Category	What they did	Insight	Origin
NYrture NEW YORK NATTO	Natto	Made the best natto available in the US (outside Japan), focused on premium artisanal niche	Embrace constraints of artisanal production as strategic advantages	US
pri	Manuka Honey	Introduced manuka honey to the US and maintained its position by emphasizing product quality and introducing lower price points	Refresh go-to-market approaches and marketing strategy periodically based on evolving market conditions	Australia & New Zealand
SPRING & MULBERRY	Chocolate bars	Created product sweetened with dates, resonating with consumers focused on avoiding sugar and non-caloric sweeteners	Find ways to adapt your product to align with your target segment while staying true to the original brand promise	US
three trees	Plant- based Milk	Redefined a premium nut milk that is refrigerated with no additives, instead of prior shelf-stable products with additives	A values-driven brand can outperform with discipline, focus, and excellent execution	US

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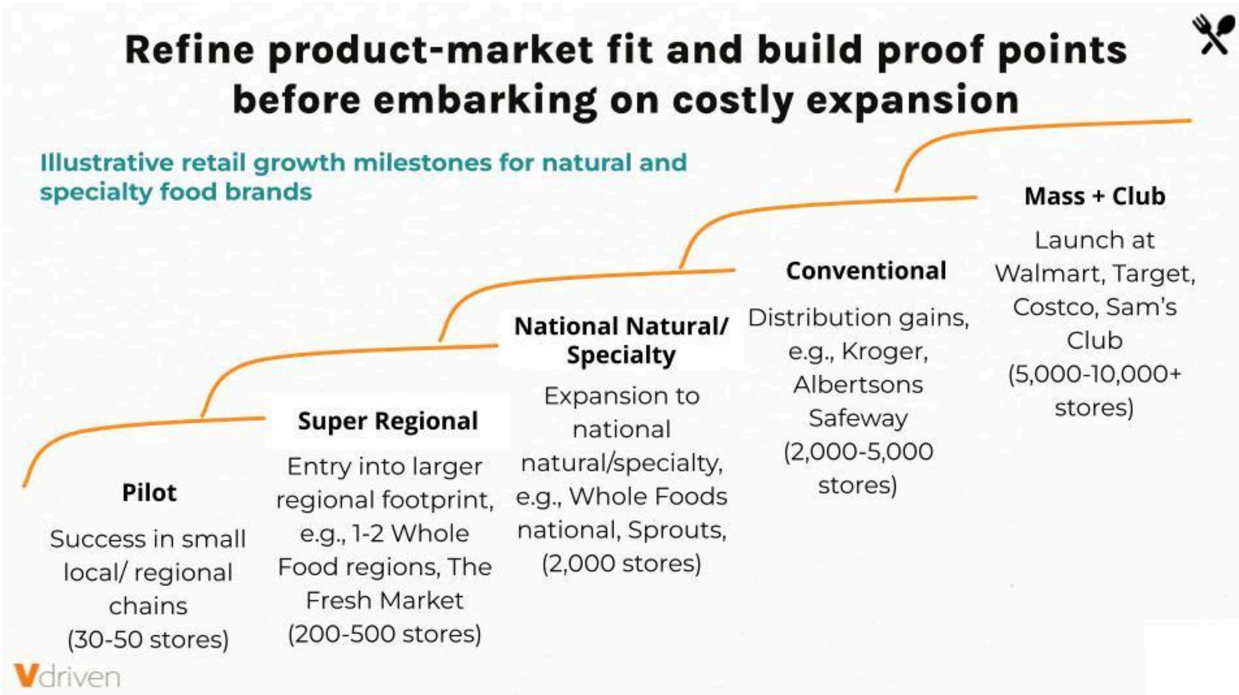
Growth Primer

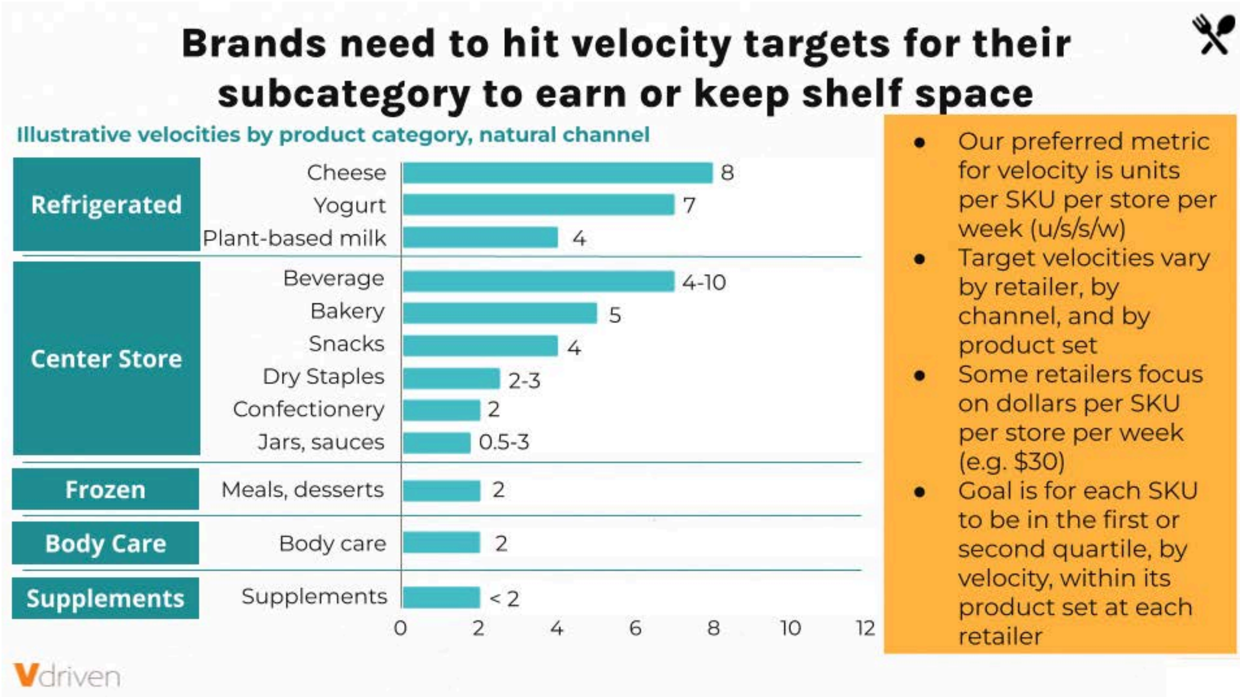


Brands must have the capital required for each stage of growth

Illustrative trajectory for natural/specialty brands

	Pilot	Super regional	National Natural/ Specialty	Conventional	Mass + Club
Revenue ($ m)	0.5	1-2	3-6	6-10	>10
Funding required ($ m)	0.2 – 0.5	0.5 – 1.5	2-5	5-15	>10
Social media followers (000s)	2	20	50	100	200
Marketing	Heaviest promo/ demo	Heavy promo	Heavy promo	Promo + above the line	Promo + above the line
Sales function	Direct or specialty broker	Direct or specialty broker	In-house sales, specialty broker, and/or regional broker	2-3 in-house sales and brokers by channel	3-4 in-house sales and brokers by channel
Number of distributors	1	1-2	3-4	5-6	7-8

Vdriven Note: Estimates are indicative and can vary significantly, by company, by product category, and by channel. Social media followers is an ideal target (and is not always met)


Brands need to hit velocity targets for their subcategory to earn or keep shelf space
Illustrative velocities by product category, natural channel
Refrigerated
Cheese
Yogurt
Plant-based milk
8
7
4
Center Store
Beverage
Bakery
Snacks
Dry Staples
Confectionery
Jars, sauces
4-10
5
4
2-3
2
0.5-3
Frozen
Meals, desserts
2
Body Care
Body care
2
Supplements
Supplements
< 2
0
2
4
6
8
10
12
Our preferred metric for velocity is units per SKU per store per week (u/s/s/w)
Target velocities vary by retailer, by channel, and by product set
Some retailers focus on dollars per SKU per store per week (e.g. $30)
Goal is for each SKU to be in the first or second quartile, by velocity, within its product set at each retailer
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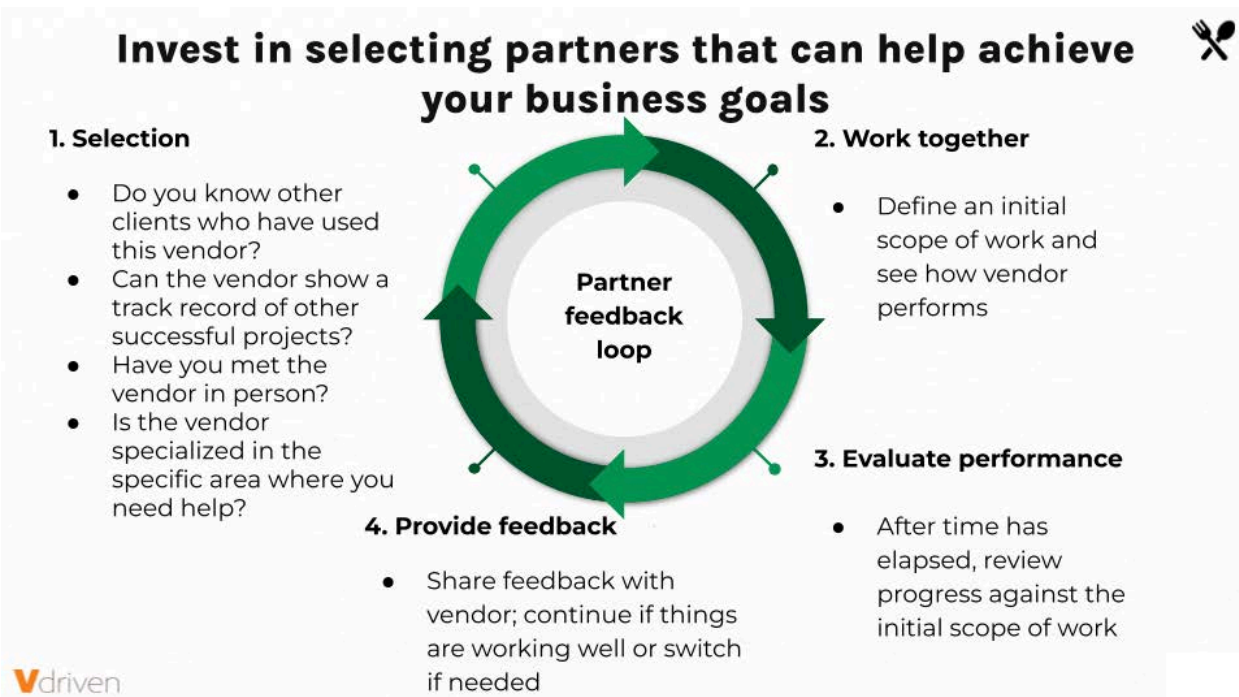
Invest in selecting partners that can help achieve your business goals
1. Selection
Do you know other clients who have used this vendor?
Can the vendor show a track record of other successful projects?
Have you met the vendor in person?
Is the vendor specialized in the specific area where you need help?
Partner feedback loop
2. Work together
Define an initial scope of work and see how vendor performs
3. Evaluate performance
After time has elapsed, review progress against the initial scope of work
4. Provide feedback
Share feedback with vendor; continue if things are working well or switch if needed
Vdriven

Companies need sufficient capital to fund a successful launch in a national retailer

Cost of a new product launch at a single national retailer can reach $500k to $1m in the first year

- Purchase or make inventory
- Freight to distributors
- New product activation fees
- Free fills/ slotting costs
- Promotional costs
- Social media marketing
- Inventory replenishment
- Distributor chargebacks
- Working capital (e.g., receivables lag time)

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Brightfull: Navigating the Complex US Nutritional Supplement Market

COMPANY BACKGROUND AND SITUATION

Alianza Team, a 75-year-old manufacturer and distributor of lipid-based food and consumer products in Colombia, had established a strong presence throughout South America with an extensive distribution network that facilitated product placement in retail outlets across the region.

In 2022, Alianza Team sought to leverage its expertise in nutritional science and manufacturing capabilities by introducing its Brightfull line of nutritional supplements in the US market through its production facility in North Carolina. The US dietary supplement market, valued at $56 billion and projected to grow at a CAGR of 5.7% through 2030,[1] represented a significant opportunity for the company's international growth strategy.

However, despite a full year of concentrated effort, Brightfull failed to secure placement on any major US retailer shelves. The product, packaged in a functional brown tub with a comprehensive list of ingredients and benefits prominently displayed, received inconsistent but uniformly negative feedback from retail buyers. Some criticized the taste profile, others noted the packaging's lack of shelf appeal, while many expressed confusion about the product's positioning within the crowded supplement category.

The disconnect between Brightfull's South American success and its US market difficulties highlighted significant differences between these retail environments. In the US, where consumers face overwhelming choices in the wellness space and retail shelf space is fiercely competitive, Brightfull's utilitarian presentation and unclear value proposition proved to be significant barriers to adoption.

The situation revealed a fundamental challenge: while Alianza Team possessed deep expertise in manufacturing, it lacked critical understanding of US consumer preferences, retail expectations, and category conventions. After months of limited progress and mounting pressure to demonstrate success in this new market, Alianza Team's leadership decided to bring in external expertise to help it navigate the nuances and entrenched relationships of the US consumer landscape.

BRIGHTFULL SOLUTION: US MARKET ENTRY STRATEGY

Alianza Team had previously worked with a US go-to-market consultant, who recommended Vdriven. Brightfull engaged Vdriven to lead US retail sales and a comprehensive overhaul of the US market entry strategy, including:

- Sales leadership: Vdriven managed retail sales directly, acting as Brightfull's retail broker.
- Amazon upgrade: Vdriven transitioned Brightfull away from an underperforming Amazon agency and connected the brand to a stronger partner.
- Legal and compliance: Vdriven helped select a US labeling attorney to ensure labeling and claims compliance, which is crucial for supplements.

PRODUCT & DIFFERENTIATION

- Completely redesigned product formulation and packaging with US-based designers, specifically for the North American market; this redesign included extensive focus group testing to validate new formulations and packaging concepts before finalizing.
- Secured pre-launch feedback from key retailers, including Sprouts Farmers Market, through Vdriven's relationships.
- Developed innovative individual sachet format to lower trial barrier, enabling customers to sample the product before committing to a full-size purchase with a higher price point.
- Enhanced taste profile to better align with US consumer preferences while maintaining nutritional benefits.

BRAND & POSITIONING

- Identified the younger Gen Z/Millennial demographic as its primary target market based on retailer input and market analysis– repositioned the brand to address the specific needs of health-conscious younger consumers seeking convenient, on-the-go supplements.
- Developed messaging around improved focus and energy as a natural alternative to caffeine and energy drinks.
- Created more vibrant, lifestyle-oriented packaging that resonated with the target demographic and stood out on shelves.
- Emphasized the brand's South American heritage and expertise in nutritional science as a point of differentiation.

DISTRIBUTION

- Deployed a dedicated US-based employee to conduct in-store demonstrations, building brand awareness and providing direct consumer education.
- Partnered with specialized Amazon.com consultants to optimize online presence – resulting in increased sales and positive reviews – and used these e-commerce performance metrics as proof points when approaching brick-and-mortar retailers.

- Secured initial placement in regional natural foods chain Earth Fare as a stepping stone to larger national distribution. Built upon success with smaller retailers to negotiate entry into national chain Sprouts Farmers Market.

PEOPLE & PARTNERSHIPS

- Recognized and addressed the differing legal requirements between South American and US markets to mitigate liability risks and partnered with a specialized third-party legal expert to ensure all product claims and labeling complied with stringent US regulations.
- Built relationships with key retail buyers through Vdriven's network, providing crucial market access.
- Established connections with influencers in the health and wellness space to build brand awareness among its target market.

OUTCOMES & KEY TAKEAWAYS

- Successfully secured placement in US retail chains, including Earth Fare and Sprouts Farmers Market, creating a foundation for continued US market expansion through proven retail partnerships.
- Established growing online presence through Amazon and direct-to-consumer channels.
- Demonstrated ability to adapt global products to meet specific regional market needs while maintaining brand integrity.

INSIGHTS LEARNED

- Be flexible: success abroad doesn't necessarily translate into US sales. Top-performing international brands must be willing to adapt positioning, packaging and pricing for the US market.
- Identify local experts: the right specialist – whether formulation, branding, packaging, brokerage, or more – can make all the difference in a complex landscape.

[1] https://www.giiresearch.com/report/grvi1530443-us-dietary-supplements-market-size-share-trends.html

The Coconut Cult: A Premium Probiotic Phenomenon

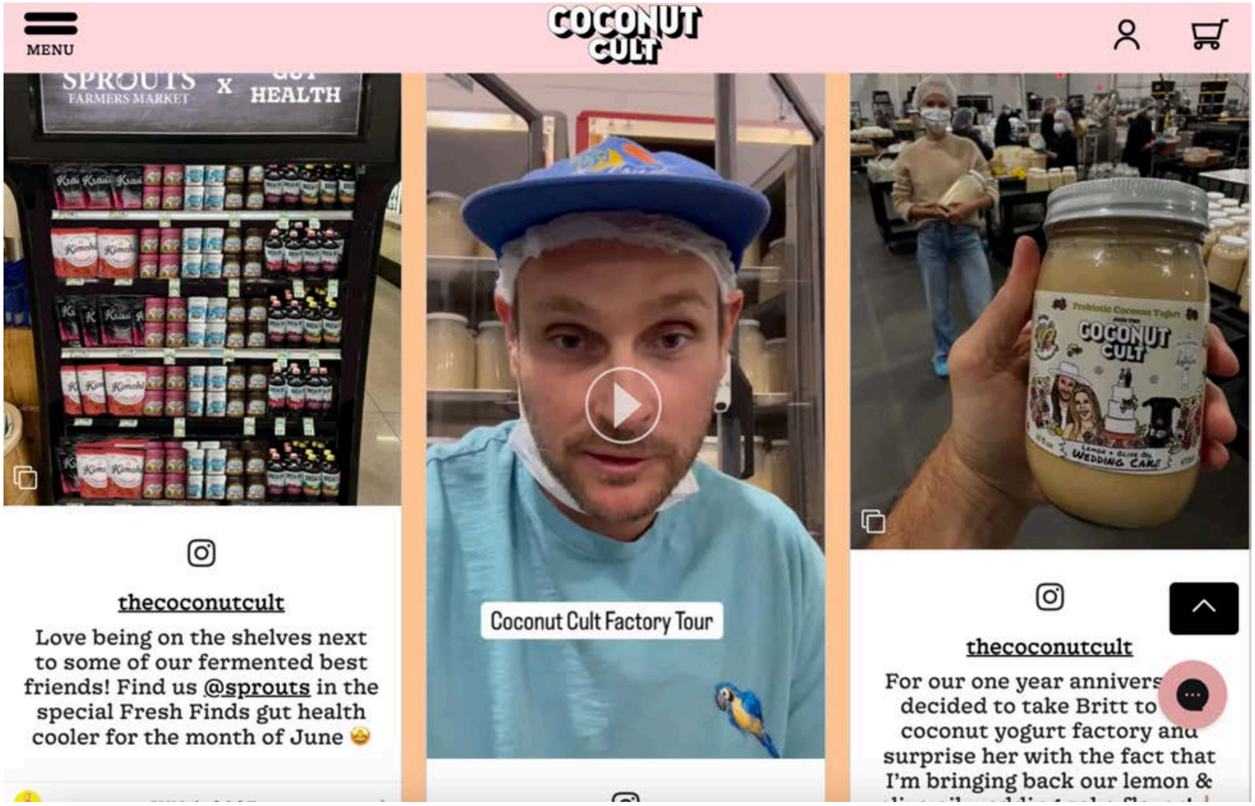
COMPANY BACKGROUND AND SITUATION

Founded by Noah Simon-Waddell following his personal journey with gut health challenges, The Coconut Cult began with a simple mission: create the most potent probiotic yogurt on the market that also tasted good.

What distinguished The Coconut Cult from prior yogurts was its extraordinary concentration of live probiotic cultures– reportedly containing 800 billion CFUs (colony-forming units) per jar, compared to the 1-2 billion found in typical yogurt products. Noah developed this formulation through extensive experimentation, ultimately creating a small-batch production process that yielded a distinctively tangy, effervescent product with a texture unlike anything else in the category. Unlike competitors who relied on stabilizers, gums, and added sugars, The Coconut Cult used only organic coconut meat, cream, and water, combined with a proprietary blend of probiotic strains. Founded in 2015, the brand initially commanded $20-$30 per jar for probiotic coconut yogurt that consistently sold out despite its premium price point.

From its origins in San Luis Obispo, California, The Coconut Cult had cultivated precisely what its name suggested– a devoted following of consumers who viewed the product as a food and also as a wellness ritual. Instagram testimonials abounded with claims of improved digestion, enhanced immunity, and even clearer skin, creating a powerful word-of-mouth engine that drove demand beyond the company's production capacity. Noah himself embodied the brand's distinctive personality– a laid-back 30-something with long hair and an authentically quirky, passionately health-focused, and refreshingly transparent communication style. His personal storytelling on TikTok and Instagram resonated with audiences seeking genuine connection with brands they support. The founder shared insights into the production process, the science behind probiotics, and his own continuing health journey, creating a powerful bond between brand and consumer.

Noah's social media approach had propelled The Coconut Cult to early success, where the product regularly sold out at a small number of premium retailers, including Erewhon, Berkeley Bowl, and select Whole Foods locations. However, yogurt was already a crowded category. Dozens and dozens of SKUs, including many organic, low sugar, and dairy-free options, already lined grocery store shelves. Creating a niche product sold solely direct-to-consumer, for its devoted followers, seemed more plausible than trying to launch a new nationwide yogurt brand in this already-crowded space. The question was whether Coconut Cult could succeed on retail shelves while preserving the artisanal quality and authentic community connection that defined its success. The small-batch production process that ensured product quality created inherent limitations on volume. The high price point– while accepted by California wellness enthusiasts– represented a significant barrier in less affluent or less health-trend-driven markets. Could the brand expand nationally while maintaining its identity and closeness to its target consumer audience?



THE COCONUT CULT SOLUTION: PROMOTIONAL HYPE AND FOLLOWER ENGAGEMENT DRIVES NATIONAL EXPANSION

PRODUCT & DIFFERENTIATION

- The Coconut Cult expanded production capabilities by establishing a 60,000-square-foot manufacturing facility in Utah, thus creating economies of scale to help reduce the consumer retail price from $25 to $10 per jar.
- Created capacity to support national distribution while preserving product quality– no compromise on probiotic potency and continued use of organic coconut meat, cream, and water without artificial additives.
- Despite increased production capacity, demand continues to consistently exceed supply and the product regularly sells out.

PROMOTION

- Developed a powerful direct-to-consumer relationship through founder-led content strategy, creating a strong affinity with Gen Z and Millennial consumers through relatable content.

- Built a substantial social media presence with over 100,000 TikTok followers and nearly 200,000 Instagram followers.
- Implemented limited-edition flavor release strategy that generates excitement and urgency– each limited-edition flavor drop consistently sells out, driving traffic to retail partners.
- Maintained vibrant community engagement through user-generated content and testimonials.

DISTRIBUTION

- Successfully secured nationwide distribution in Whole Foods Market despite supply constraints, establishing unprecedented retailer relationships where product regularly selling out is accepted.
- Created a situation where retailers value the brand for its ability to drive store traffic.
- Benefited from a distribution strategy that treats scarcity as an asset rather than a limitation.
- Preserved direct-to-consumer e-commerce channel as both sales platform and consumer relationship tool.

BRAND & POSITIONING

- Consistently positioned as a more youthful, counter-culture alternative to conventional CPG brands.
- Maintained this brand positioning using distinctive visual identity featuring vibrant colors and playful packaging, founder-led storytelling, social media use engagement, and unique, fun flavor profiles that create conversation and shareability.
- Built brand awareness with the founder's social media engagement, rather than traditional advertising or influencer marketing.
- Maintained authentic voice across all consumer channels.

OUTCOMES & KEY TAKEAWAYS

- Achieved national Whole Foods Market placement while maintaining premium positioning and pricing.
- Built a substantial social media following that continues to drive organic brand growth.
- Established a model where product scarcity enhances rather than damages brand equity.
- Proved that demand-exceeding-supply can be a strategic advantage rather than an operational failure.

INSIGHTS LEARNED

- Authenticity scales: maintain a strong voice and brand ethos throughout the growth phase to preserve loyalty and deepen connections.

- Use scarcity strategically: controlled distribution and limited availability can drive demand, create mystique, and foster community.
- Let demand guide strategy: when a brand builds genuine emotional connection, don’t be afraid to break traditional rules around pricing, marketing, or distribution.

Fishwife: From Spanish Conservas to American Revolution

Growing up in New Hampshire, Becca Millstein's relationship with canned seafood reflected the broader American experience: tinned fish was a bland, utilitarian pantry ingredient relegated to tuna salad and casseroles, something to be masked with condiments and flavors rather than celebrated or savored. A year of study abroad in Granada, Spain, changed Becca's view.

In Granada's vibrant food culture, Becca discovered canned sardines and mackerel featured prominently in tapas bars, paired with local wines, and made for sophisticated on-the-go snacks. Tinned seafood carried aesthetic appeal, cultural tradition, and genuine desirability. Known locally as "conservas", these foods were displayed everywhere in Spanish shops, demonstrating a mature market that considered preserved seafood a convenience and a culinary treat.

Years later, during COVID-19, Becca recalled her experience when brainstorming ideas for a new entrepreneurial venture. She wondered if she could introduce Spanish-inspired conservas culture to American consumers. What if canned seafood could be transformed from a bland commodity into something desirable, elevated, and aesthetic? The idea led to the conception of her company, Fishwife, a tinned fish company bringing conservas culture to the North American table.

The path from cultural inspiration to market reality would require Becca to navigate complex challenges beyond product development. The US canned seafood market represented a $2.6 billion category, approximately 80% dominated by commodity tuna.[1] Yet, it had remained largely immune to the premiumization trends that had transformed other food categories like chocolate, coffee, and olive oil. Unlike Spain, where conservas culture had evolved organically over generations, the US market would require fundamental consumer education about quality, sourcing, and culinary applications of tinned seafood.

The challenge was multifaceted: Millstein would need to a) source responsibly-caught seafood that met both quality and sustainability standards, b) develop modern branding that could compete with established players,c) educate consumers about artisanal preserving techniques, and d) create distribution strategies that could reach Americans willing to pay premium prices for what most considered a cheap commodity product.

Perhaps most critically, Fishwife would need to overcome deeply ingrained cultural perceptions about canned fish, transforming a category associated with emergency meals and fishy flavors into one that celebrated the ingredient itself as a sophisticated, convenient, and socially acceptable culinary choice. The success of this vision would depend on whether American consumers were ready to embrace a fundamentally different relationship with preserved seafood—one that prioritized quality, aesthetics, and culinary adventure over mere functionality.

FISHWIFE SOLUTION: ELEVATE CANNED SEAFOOD INTO A CONCEPT, NOT A COMMODITY

Fishwife's strategy was to reposition the entire category of canned seafood for the American consumer, elevating it to a center-of-plate culinary experience. The company combined an authentic, Spanish-sourced product with vibrant branding and aspirational storytelling that helped connect the traditional dish to a more modern audience. The company scaled methodically from DTC testing through specialty retail partnerships, using organic social engagement and extensive sampling programs to educate consumers about premium canned seafood.

PRODUCT & DIFFERENTIATION

- Partnered with traditional, hand-packed canneries in Galicia, Cantabria, and other Spanish regions known for authentic, high-quality seafood products and processing.
- Developed distinctive flavor profiles that elevated the culinary experience, in contrast to the flavorless commodity tuna that dominated the US market.
- Treated the product as a dish centerpiece rather than pantry filler– eaten straight from the tin, used in entertaining, or featured in recipes, thus resulting in higher consumption than with legacy US canned seafood.

BRAND & POSITIONING

- Prioritized unique, colorful brand and packaging design from day one to stand out on shelf.
- Chose name “Fishwife”, which is brash, intentionally attention-grabbing, and a departure from prior category leaders, which had far “safer” brand names such as Starkist, Chicken of the Sea, or Wild Planet. “Fishwife” pays homage to its Spanish heritage while also seeking to reinvent a disparagement into a compliment – mirroring the company’s mission for the category.
- Shifted category positioning from functional pantry staple to premium indulgence experience, emphasizing quality, taste, and sustainability.

PROMOTION

- Attracted early adopters, both passionate homecooks and aspiring ones, through authentic storytelling and unpaid influencer seeding campaigns on social media.
- Focused on communicating an aspirational narrative to consumers stuck at home during COVID-19, helping them experience travel to Europe through food.
- Invested early in sampling and brand ambassador programs in stores to educate consumers on the product and the newly defined category. Now maintaining 20 brand ambassadors, conducting 1,500 demos annually.

DISTRIBUTION

- Launched initially DTC, benefiting from COVID-driven online shopping behaviors and enabling Fishwife to grow methodically through testing and learning early on.
- Expanded to over 2,000 niche specialty shops (e.g. local coffee shops, bookstores, corner stores), through direct website sales, the Faire marketplace, and smaller distributors. These smaller point-of-sale provided performance data to build a track record and case for being on shelf before approaching larger retailers.
- Expanded iteratively with Whole Foods, first with 1 item in 1 region, then scaling to 4 items in 4 regions after 6 months, and now nationwide.

PEOPLE & PARTNERSHIP

- Welcomed increased competition in the segment as the company believed it elevates the entire category and helps stores think differently about canned seafood aisles and merchandising. New entrants also help prove the movement that Fishwife started is not just a trend or fad.

OUTCOMES & KEY TAKEAWAYS

- After launching in December 2020, Fishwife has reached 1,800 stores by 2024 and is projected to be in 10,000 stores by the end of 2025.
- The company has achieved consistent revenue growth across all channels, and built a virtuous cycle in which DTC sales supports retail performance, and vice versa.

INSIGHTS LEARNED

- Premiumization is a full-package play: excellent flavor, bold visual identity, and social-ready content are all required to elevate a product - taste alone is not enough.
- Whitespace exists in every category: even in mature markets, strategic repositioning can unlock unmet consumer demand and challenge category norms.
- Build before you scale: validate product-market fit, strengthen supply chain fundamentals, and tailor go-to-market strategies by channel before pursuing broad retail expansion.

[1] This Is TASTE podcast episode 273: Fishwife (8/28/2023)
https://podcasts.apple.com/us/podcast/fishwife/id1393739959?i=1000625903631

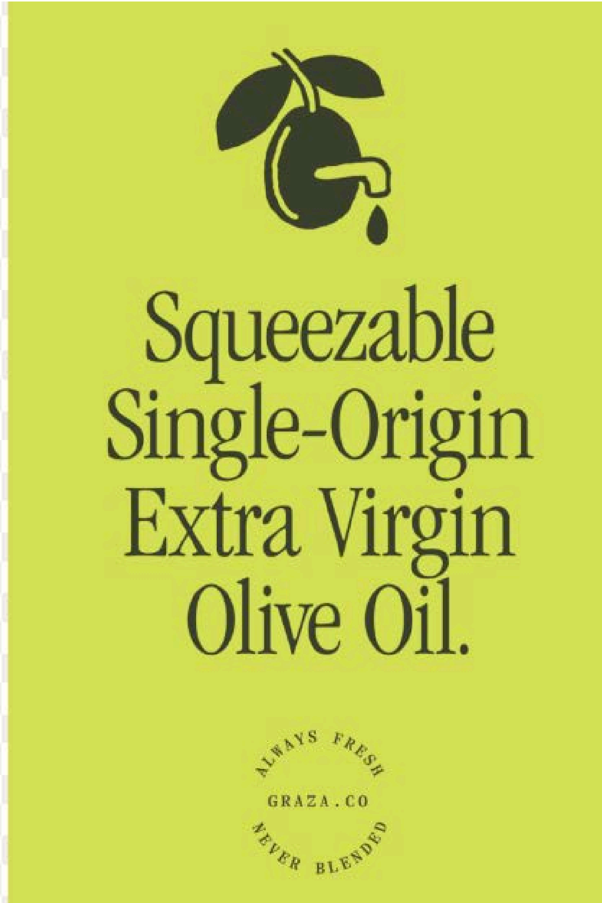
Graza: Squeezing Innovation into America's Olive Oil Aisle

COMPANY BACKGROUND AND SITUATION

In 2019, Andrew Benin, after working at direct-to-consumer startups such as Warby Parker, Casper, and Magic Spoon, was living in Cádiz, Spain, with his wife's family when he experienced what he calls a "truly sensory" moment. Tasting freshly pressed, unfiltered olive oil from a local co-op, watching villagers walking with five-liter jugs of liquid gold, Benin realized that Americans were being dramatically shortchanged by their olive oil options.

When Andrew brought Spanish olive oil back to New York for a tasting with Michael Anthony, executive chef of Gramercy Tavern, he initially envisioned creating another luxury brand for discerning palates. Michael’s response, however, completely reoriented his thinking: "You know what America doesn't need? Another bougie luxury olive oil purveyor from a small estate, and no one can afford it, and it doesn't scale...I really think what we need is this product, but for everyone." This feedback crystallized Benin's insight that the real opportunity wasn't in the crowded premium segment, but in the vast middle market where consumers wanted better quality without luxury pricing and without the intimidation factor that surrounded most premium olive oil.

Americans’ olive oil consumption grew from 28,000 metric tons in the early 1970s to more than 400,000 in the 2020s. Yet despite this dramatic growth, the market remained largely unchanged in product innovation and consumer experience. Andrew launched Graza in 2022 with a deceptively simple but revolutionary proposition: make olive oil more usable, more fun, and more accessible. However, the path from innovative concept to market success would test whether American consumers were ready to embrace this reimagining of olive oil culture.



GRAZA SOLUTION: MODERN, UNPRETENTIOUS BRANDING AND TRANSPARENT MESSAGING

Graza's success stemmed from a deliberate strategy that prioritized simplicity, accessibility, and functional innovation over traditional luxury positioning. By relentlessly focusing on making great olive oil approachable for everyday use, the company built a brand that drove trial and repeat usage through superior user experience. Its approach combined bold design choices with authentic customer relationships, creating a modern brand that resonated with consumers seeking quality without pretension.

PRODUCT & DIFFERENTIATION

- Graza focused exclusively on olive oil sourced from Spain, single-varietal and single-origin – no product expansion into unrelated pantry categories.
- Created a signature, easy-to-use plastic squeeze bottle that transformed olive oil from a precious commodity to an everyday cooking tool, encouraging liberal use rather than careful conservation.
- Just three core SKUs: Drizzle, Sizzle, and Frizzle, each designed for a specific culinary

use: finishing, cooking, and high-heat frying. By prioritizing function over factors like olive varietal or origin, Graza makes choosing the right olive oil easy for the non-expert consumer.
- Reverse engineered the product to achieve an affordable-premium price point of $15 per 750 mL bottle, ensuring quality without necessitating a high price point.

BRAND & POSITIONING

- Graza's squeezable bottle became its defining feature, signaling ease, affordability, and shelf differentiation while being simultaneously functional, highlighting how chefs typically use squeeze bottles.
- Packaging is further positioned to take advantage of the trend in replacing cooking seed oils (in a chef's squeeze bottle) with olive oil.
- Created a brand voice that was casual, transparent, and unpretentious, targeting design-conscious, younger consumers.
- Deliberately avoided nostalgic, imported heritage branding in favor of modern, unpretentious, and transparent messaging meant for everyone.

PROMOTION

- Seeded products pre-launch to a curated group of chefs, food influencers, and creators who genuinely used and loved the product, building buzz on Instagram and TikTok.
- Collaborated with other high-quality food brands like Ithaca Hummus, Little Spoon and Alec’s Ice Cream to increase brand visibility, tap into shared customer bases, and highlight use cases beyond sautéing and salad dressings.
- The Wall Street Journal profiled Graza as a case study in brand trust and consumer transparency after Andrew personally emailed 35,544 customers apologizing and addressing customer concerns after a holiday surge in 2022 led to product stock outs.

DISTRIBUTION

- Took 18 months to launch, ensuring supply chain and positioning were sound before market entry.
- Started with a strong DTC foundation, during which the company could control messaging, gather customer data, and refine operations before retail rollout.
- Graza generated such strong consumer demand and buzz that retailers like Whole Foods proactively reached out.
- Focused on off-shelf displays, end-of-aisle displays, and integration into non-traditional locations like the produce section to maximize the product’s visibility and impulse purchases.

OUTCOMES & KEY TAKEAWAYS

- Graza achieved $100K sales on its first day of launch.

- The company's sales grew from $4M in Year 1 to over $50M in Year 3, achieving a 161% CAGR over a two-year period.

INSIGHTS LEARNED

- Lead with extreme focus: a tightly curated product line simplifies decision making, builds brand clarity, and ensures operational efficiency.
- Make packaging a strategic asset: use distinctive, functional design to drive trial, reinforce brand identity, and differentiate on crowded shelves.
- Consider how consumers use and interact with the product in real-world situations to inform functional design.
- Disrupt by making premium feel everyday: instead of relying on luxury cues or exclusivity, stand out by offering high-quality products that are easy to use, priced accessibly, and designed to feel familiar and approachable to a wide audience.
- Question conventional wisdom: even large established markets have room for novel entrants.

NYrture: Positioning a Traditional Japanese Superfood in Modern America

COMPANY BACKGROUND AND SITUATION

NYrture was built on a singular mission: introducing authentic natto to American consumers. Natto, a traditional Japanese superfood made from fermented soybeans, has been consumed for centuries in Japan for its remarkable nutritional profile and health benefits. Containing more vitamin K2 than any other food, probiotics, and nattokinase (a powerful enzyme), natto offered a rare combination of nutritional properties increasingly sought by health-conscious Americans.

Despite natto's impressive attributes, it presented significant challenges as a consumer product in the US market. The food's distinctive texture – sticky, stringy, and somewhat mucilaginous – along with its pungent aroma and strong flavor profile, made it an acquired taste even for adventurous American palates. NYrture's product required considerable consumer education around culinary uses and health benefits to overcome initial sensory hesitations.

NYrture was founded by Dr. Ann Yonetani, a microbiologist with deep expertise in food fermentation and a former professor at The New School's pioneering Food Studies program in New York. Dr. Yonetani had developed a meticulous, small-batch production process that yielded what connoisseurs considered the highest quality natto available outside Japan. Each batch was carefully fermented in NYrture's New York kitchen under precise conditions to cultivate the beneficial Bacillus subtilis varieties of bacteria that give natto its distinctive properties. This artisanal approach ensured exceptional quality but created inherent limitations on production capacity and scalability.

Through passionate advocacy and word-of-mouth from early adopters, NYrture achieved modest but notable success. The company had secured placement in prestigious specialty retailers known for curating distinctive, high-quality foods, including Berkeley Bowl in Northern California and Erewhon in Los Angeles – stores with discerning buyers and clientele willing to embrace unique products with compelling health narratives.

This initial traction validated that a market existed for authentic, high-quality natto in America. However, it also raised fundamental questions about the company's growth trajectory. NYrture found itself at a critical strategic crossroads, facing several interconnected challenges. The labor-intensive, artisanal production process created natural constraints on volume and profitability. The product required significant consumer education to overcome taste barriers and build a broader customer base. And while placement in elite specialty retailers provided credibility, it limited potential reach and confined the brand to a narrow, premium niche. NYrture faced a decision: whether it should remain a niche, artisanal product or transform and grow into a brand with broader appeal to a wider American audience.

NYRTURE SOLUTION: EMBRACING NICHE POSITIONING

At the recommendation of one of its specialty retailer customers, NYrture engaged Vdriven to evaluate growth options and chart a sustainable path forward. The retailer loved the product and wanted to see it succeed. Vdriven began with a deep-dive analysis, including eight hours of in-person work. The analysis revealed limited mass-market potential due to NYrture's production constraints and niche appeal. Instead of scaling for mass adoption, NYrture chose to pursue a strategy of optimizing its current business model and focusing on enhancing operational efficiency while maintaining product integrity. Vdriven held regular progress review meetings in the succeeding months to help support the company in achieving its goals.

PRODUCT & DIFFERENTIATION

- Determined that the artisanal fermentation process could not be mechanized without sacrificing quality; however, it could realize savings from modest process improvements.
- Process improvement cost savings enabled NYrture to maintain consistent pricing despite inflationary pressures, thus preserving a premium but accessible price point for their target consumer segment.
- Maintained the company's commitment to environmentally-friendly glass jar packaging, despite higher costs, as plastic packaging alternatives would have reduced costs but compromised the company's sustainability mission.
- Reinforced product positioning as authentic, artisanal Japanese superfood.

DISTRIBUTION

- Maintained a focus on high-end specialty retailers aligned with brand positioning – continued relationship with Berkeley Bowl and Erewhon as flagship retail partners.
- Deliberately opted against pursuing larger chain distribution given production constraints and desire to retain product quality and integrity.

- Developed a selective expansion strategy targeting only retailers with an appropriate customer base.

PROMOTION

- Shifted from broad awareness goals to a targeted, educational content strategy – developed in-depth educational materials explaining natto's health benefits and preparation methods.
- Focused marketing resources on nurturing its existing customer segments rather than mass acquisition.

OUTCOMES & KEY TAKEAWAYS

- Achieved sustainable profitability within a defined niche by building a loyal, passionate customer base willing to pay a premium for authentic products– volume at its existing retail locations grew to 3-4 cases per week.
- Secured placement in MOM's Market, expanding presence in the natural foods retail segment.

INSIGHTS LEARNED

- Embrace constraints as strategic advantages: rather than forcing scale, build around the inherent limitations of the product to conserve quality and mission.
- Deepen relationships with core consumers: focus on loyalty and engagement within a community instead of diluting the brand to chase mass appeal.
- Build a sustainable niche, not just a big business: success in speciality categories can be thoughtful, with values-driven positioning, rather than from volume or mass distribution.

PRI: From Pioneer to Competitor in the US Manuka Honey Market

COMPANY BACKGROUND AND SITUATION

Over forty years ago, David Noll went on a surfing trip to New Zealand that would change his life. He met his wife and discovered Manuka honey– a product exclusively sourced from bees that gather pollen from native Manuka trees in New Zealand and Australia. Manuka honey's health benefits include wound healing, tissue regeneration, and enhanced oral and digestive health.The honey's antibacterial effects come from its high concentration of methylglyoxal (MGO), which gives it stronger antimicrobial activity than regular honey.

David returned to the US with the idea to introduce Manuka honey to the US market. At the time, the honey market was dominated by industrial-scale operations producing lower-quality, mass-market products. David's timing proved fortuitous as the broader health food movement was gaining momentum, creating demand for authentic, premium natural products. The product's reputation gained credibility when a Paralympic team member declared that Manuka honey had "saved his life", which resonated across Europe and eventually the United States. This endorsement helped establish Manuka honey as a wellness solution rather than just another sweetener and, over the years, PRI became the established leader in the segment through a grassroots, relationship-driven expansion into independent natural grocery stores.

Decades later, when this family business transitioned to David's daughter and her husband, the market landscape had shifted. Competitors like Wedderspoon were aggressively capitalizing on the foundation that David's pioneering efforts had established, securing expanded shelf space and market share. Despite PRI having introduced Manuka honey to American consumers and maintaining high product quality, they were no longer the number one brand in the category it had created.

The challenges multiplied as numerous New Zealand companies began entering the US market. Meanwhile, consumer behavior had shifted and a new generation of health-conscious buyers emerged. This new demographic approached purchasing decisions differently – they valued data, sought compelling brand narratives, were price-sensitive, and discovered brands through online and social media channels.

PRI SOLUTION: BRINGING THE BRAND TO THE NEXT GENERATION WHILE STAYING TRUE TO ITS ROOTS

PEOPLE & PARTNERSHIPS

Recognizing that the market had evolved, PRI sought out a partner to overhaul its marketing and distribution strategy and found Vdriven through a mutual connection. Vdriven in turn recommended several key partners:

- Brand and digital strategy: branding/labeling, direct consumer marketing, website design
- Amazon consultant to optimize sales
- Distribution and operations: Transportation efficiency expert

This collaborative approach modernized the product portfolio, redesigned packaging and branding, introduced lower price points and product variants, and implemented digital marketing to reach and education consumers directly.

PRODUCT & DIFFERENTIATION

- Introduced lower price points to capture price-sensitive segments:

    - Smaller 250g jars priced at $20 (instead of the previous entry point of $35 per jar) made the product more accessible for a wider set of consumers.
    - Introduced a "blended" product at $9.99 – a combination of Manuka and regular honey – for mass channels.
- Added QR codes on packaging that allowed consumers to instantly link to a certificate of analysis for each jar's specific batch.
    - Consumers can see independent, 3rd party verification for every batch's MGO levels.
    - Whereas store employees at a health food store might educate consumers, these QR codes were better suited for large retailers, where staff education is less viable.
    - Reinforced PRI's original brand promise of providing the highest quality Manuka honey with verified MGO content.
- Redesigned packaging as a more modern food product, rather than as a specialty product that would sell itself. Goal was broader appeal and approachability while maintaining brand consistency and recognition across SKUs.

<table>
<tr><th>Old packaging</th><th>New Packaging</th></tr>
<tr><td>


</td><td>


</td></tr>
<tr><td>
• Brand logo is small
• Minimal product claims on front
</td><td>
• Brand logo prominent and consistent across SKUs
• MGO content prominently displayed
• QR code on top of jar
• 4 product claims clearly articulated
</td></tr>
</table>

Brand & Positioning

- Emphasized quality and authenticity through transparency initiatives like QR code verification.
- Emphasized family heritage as the original Manuka honey brand with over 40 years of trusted operations in the US and working with family farms in Australia and New Zealand.
- Environmental messaging highlighted bee conservation efforts and decades-long local, sustainable beekeeper relationships.

Promotion

- Expanded online presence through multiple digital channels and data-driven campaigns (TikTok, Instagram, Mark Cuban influencer partnership).
- Shifted from store education to direct consumer marketing using Facebook and Google platforms to reach end consumers.
- Partnered with a social media marketing agency to amplify reach and use a data-driven approach to identify and focus on the most effective promotional channels.

Distribution

- Focused on the highest-performing SKUs for major distribution channels while eliminating underperforming products – Whole Foods SKU rationalization from 10 SKUs to 3 SKUs based on data-driven performance analysis, with higher revenue per store.
- Used smaller/local distributors to fill market gaps and maintain coverage in key regions.

OUTCOMES & KEY TAKEAWAYS

- Revenue growth of 3x across the business, demonstrating the effectiveness of the multi-pronged strategy.
- Online order revenue grew 12x showing successful digital transformation and direct-to-consumer capabilities.
- Increased market share in the competitive Manuka honey segment despite numerous new entrants.

INSIGHTS LEARNED

- Modernize while preserving core values: refresh branding, pricing, and SKU portfolio to meet today’s market expectations, while staying grounded in authenticity, quality and transparency.
- Use strategic tiering to expand reach: introduce accessible formats and clear product claims to attract new consumers without diluting premium positioning.
- Tap into the knowledge of experts: working with experienced partners ensures smarter decisions and faster execution in complex markets.

Spring & Mulberry: From Luxury Niche to Mass Prestige

COMPANY BACKGROUND AND SITUATION

Kathryn Shaw founded Spring & Mulberry following a cancer diagnosis in her 30s that transformed her relationship with food. Unable to find premium chocolate options that satisfied both her indulgence desires and health-conscious needs, she began crafting treats using dates as natural sweeteners and incorporating exotic ingredients inspired by global culinary experiences. Drawing upon her brand expertise from working with Unilever, LVMH, and Pantone, she crafted a luxury chocolate brand that appealed to the discerning, yet health-conscious consumer. Kathryn partnered with long-time friend Sarah Bell and, in 2022, launched Spring & Mulberry with six distinct flavor combinations priced at $10 per bar. The packaging featured a minimalist design with subtle metallic accents, while the bars themselves showcased visible whole ingredients– dried fruits, nuts, and flower petals– embedded in rich, fair-trade dark chocolate.

"I wanted to flip health food on its head by really leaning into the indulgence, the pleasure, and the beauty of whole foods," Kathryn explained. "In other countries, they present foods from the earth in beautiful packaging…I thought about doing the same with our chocolate. I wanted to let nature shine through and show it can be an indulgent, pleasurable treat."

Despite early success in Nordstrom's gourmet food sections and high-end specialty stores, Spring & Mulberry faced a critical business challenge by 2023. Their luxury placement represented a limited market where even satisfied customers purchased infrequently as special occasion treats or gifts. While achieving strong margins on individual sales, total revenue remained constrained by narrow distribution and low purchase frequency.

By 2023 Kathryn and Sarah recognized that grocery retail represented their biggest growth opportunity. The challenge, however, lay in navigating this transition while maintaining brand integrity. Grocery stores operated on different economics than specialty retailers– lower margins, higher volume expectations, and more price-sensitive consumers. Yet grocery also offered the promise of routine purchasing behavior and significantly broader market reach.

The question facing Spring & Mulberry was not whether to expand into grocery retail, but how to do so successfully. Should it create a separate product line with different positioning and pricing? Could it maintain a $10 price point in a grocery environment? How would the company manage the brand perception challenge of moving from Nordstrom's to supermarket shelves?

Additionally, the move to grocery would require addressing Spring & Mulberry's omnichannel strategy comprehensively. While Spring & Mulberry had a direct-to-consumer website, it represented a small portion of sales. Grocery expansion would need to integrate seamlessly with both online sales and the company's existing specialty retail presence.

Strategic Pivot: The Path to Mass-Prestige

PEOPLE & PARTNERSHIPS

Recognizing the challenges of its current strategy, Kathryn and Sarah made the decision to engage Vdriven, a specialized CPG and retail consultant with deep expertise in natural grocery and omnichannel product placement.

Vdriven first met Spring & Mulberry at the Good Food Mercantile show in New York, where a five-minute conversation at the brand's booth between Vdriven founder Luke Abbott and Spring & Mulberry led to a partnership. This underscores the importance of meeting vendors and service providers in-person; a relationship established face-to-face became the foundation for shaping Spring & Mulberry's growth strategy.

PRODUCT & DIFFERENTIATION

Analysis revealed several critical insights that challenged Spring & Mulberry's existing approach. Most significantly, the $10 price point that worked in specialty retail was a non-starter in grocery, even in premium natural chains. Additionally, grocery consumers cared more about key details such as cacao percentage when choosing between chocolate brands. These insights led to the following product updates:

- Spring & Mulberry developed a more affordable "Essence" line with ingredients blended into chocolate instead of whole. This product change enabled them to achieve a $6.99 price point suitable for grocery channels.
- Packaging was updated to include a clearly labeled cacao percentage for grocery consumers, who associate higher percentages with sophistication and health benefits.

BRAND & POSITIONING

Spring & Mulberry established a premium brand identity at the intersection of luxury and wellness. Throughout its growth into mass retail, the company maintained consistent brand values while adapting its positioning to different retail contexts, successfully translating its luxury heritage into a competitive advantage in broader markets as an ‘everyday indulgence’ that is still good for you.

- Positioned the brand at the intersection of luxury and wellness ("mass prestige").
- Developed a core customer profile of women aged 35+ who prioritize travel, wellness, and premium experiences, and used this profile to guide expansion strategy, with the goal of meeting the target consumer wherever she tended to shop.
- The company’s founders were themselves in this target demographic and so created affinity with their customers by weaving in their own personal stories and narratives into the brand’s core messaging.

DISTRIBUTION

The company adopted an iterative approach to market entry, continuously refining products based on retailer feedback rather than immediately launching broadly with grocery chains.

- Initially focused on establishing credibility in the luxury segment through Nordstrom's gourmet food sections and high-end specialty stores in New York.
- Strategic expansion into grocery retail (Whole Foods, Gelson's, Sprouts) was supported by iterative product, packaging, and pricing feedback from large chains.
- Established a comprehensive omnichannel approach beyond grocery that included boutiques, juice bars, coffee shops, hotels, and airports– anywhere the ideal customer tended to shop. These diverse revenue streams provided business stability during lengthier grocery retailer purchasing cycles (12-18 months).

- Meanwhile, maintained a direct-to-consumer website and Amazon presence as experimentation engines for new products.

PROMOTION

Spring & Mulberry utilized several promotional strategies centered around building premium brand awareness.

- Secured media coverage in premium and lifestyle publications (goop, Food Network, Vogue, Bon Appetit).
- Developed a strong social media presence with emphasis on user-generated content and Instagram-worthy product media to drive organic marketing.

OUTCOMES & KEY TAKEAWAYS

Spring & Mulberry's strategic expansion delivered significant results over the course of a year.

- Achieved 3x sales growth in 2024.
- Successfully completed a funding round with institutional investors.
- Landed distribution contracts with the two largest natural grocery retailers in the USA – Whole Foods and Sprouts.

INSIGHTS LEARNED

- Find ways to adapt a product to alternative price points while staying true to the original brand promise, such as translating luxury into mass-prestige by adjusting price and format.
- Let retail insights shape product evolution: ground product and packaging decisions in retailer and consumer feedback.
- Engage experienced partners to navigate scale: collaborating with specialized advisors can accelerate retail expansion, sharpen omnichannel strategy, and avoid costly missteps in mass market entry.

Three Trees: Strategically Scaling a Mission-Driven Plant-Based Food Brand

COMPANY BACKGROUND AND SITUATION

Three Trees, a plant-based milk company founded by Jenny Eu, had established itself as a promising contender in the natural foods marketplace. The brand was built on Eu's family history and cultural heritage of creating nourishing foods from simple plant ingredients. With a clear mission to delight consumers with clean, plant-based foods without processing, additives, or added sugar – while maintaining exceptional taste – Three Trees had successfully secured placement in 4,000 stores nationwide, including Whole Foods and Target. The company's organic nut milks, made with minimal ingredients – typically just nuts, filtered water, and a pinch of salt– offered a truly clean label that distinguished it from competitors who relied on thickeners, stabilizers, and other additives.

Through determined bootstrapping efforts, reinvesting nearly every dollar of profit back into the business, Three Trees had achieved notable success in its initial growth phase. However, as the company approached the critical juncture of nationwide expansion, it encountered a significant hurdle. Retail buyers made it clear that to achieve expanded distribution across all Whole Foods regions and other national chains, Three Trees would need to demonstrate substantially higher sales velocity – specifically, over 3x velocity (units sold per SKU per store per week) across all SKUs.

To address this challenge, Three Trees had assembled what appeared to be a comprehensive sales infrastructure. The company operated with two separate broker networks – one covering the East Coast and another handling the West Coast. They had hired both an internal sales manager and a brand manager to coordinate marketing and sales efforts. Despite these resources, the anticipated growth acceleration remained elusive.

Several concerning issues undermined the company's performance. The effectiveness of the broker networks varied substantially by region and even by retailer, resulting in inconsistent execution. The multiple layers between the company and retail shelves—brand managers, brokers, distributors—created accountability gaps. Perhaps most troubling was the financial impact: Three Trees spent a percentage of total revenue on these various middlemen, a significant expense for a bootstrapped company operating in a highly competitive category.

The situation had reached a critical juncture. Without achieving the required velocity metrics, Three Trees would remain out of nationwide distribution, limiting both its growth potential and its ability to fulfill its mission of making truly clean plant-based foods accessible to more consumers. Yet continuing with the current approach was draining precious resources without delivering the necessary results.

THREE TREES SOLUTION: DATA-DRIVEN GROWTH STRATEGY

After careful assessment, it became clear that changes were needed in how Three Trees approached its distribution and growth strategy. The company engaged a specialized consulting firm to help completely restructure its go-to-market approach, building a more direct, accountable, and efficient model from the ground up. The future of Three Trees – and its mission to transform the plant-based food landscape – hinged on successfully navigating this critical transition.

DISTRIBUTION

- Used data insights to prioritize high-potential regions and stores for focused distribution efforts.
- Assigned an internal team member to develop relationships with store-level managers through phone, email, and in-person visits, relationships that competitors relying on traditional broker models couldn't match. These relationships helped minimize out-of-stock items, optimize shelf placement, and provide competitive insights.
- Identified Whole Foods locations where products were not on shelf and targeted them for direct outreach – sent company representatives in person to visit key stores, developed personal relationships with store managers, and provided them with promotional swag bags to build goodwill and recognition.

PRODUCT & DIFFERENTIATION

- Uses 4x the almond content of competing brands, leading to a creamier, superior taste without the use of gums.
- Launched new SKUs based on retailer feedback, demand signals in category data, and consumer input.
- Aligned product portfolio with actual consumer purchasing behavior rather than internal preferences.

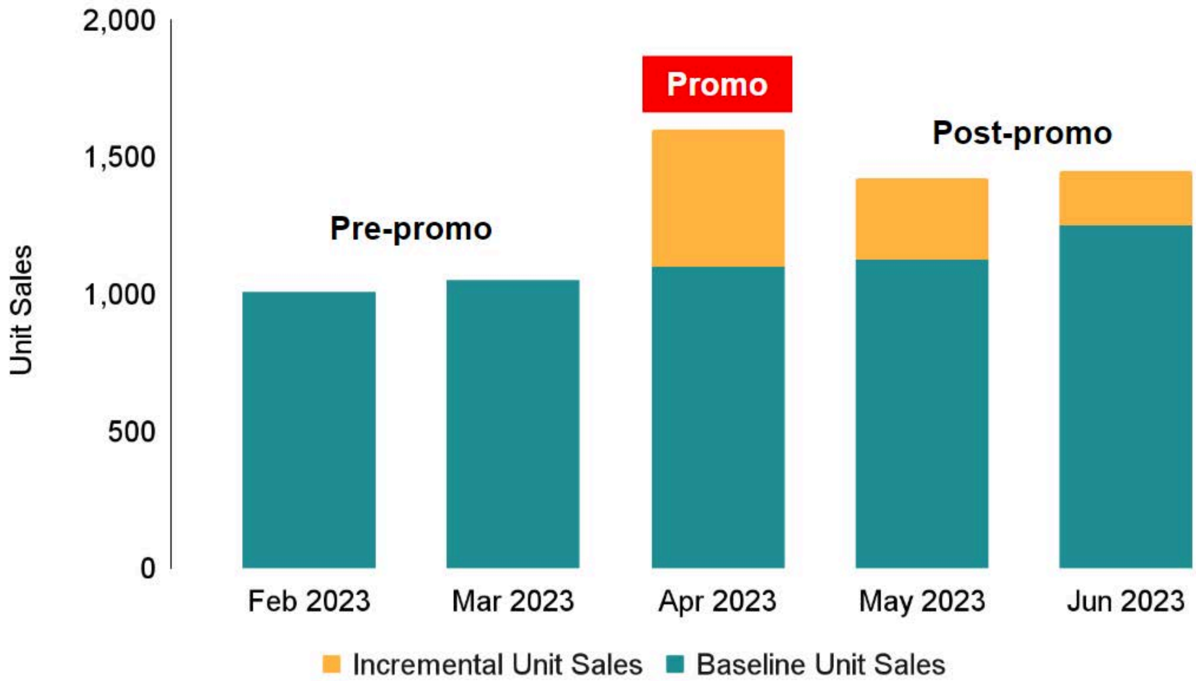
PROMOTION

- Implemented highly targeted promotional strategy governed by ROI analysis, enabling the limited marketing budget to be allocated based on data-validated performance metrics.
- Conducted rigorous analysis of promotion types, discount levels, and timing to identify optimal approaches.
- Tracked and measured results of all promotional activities and discontinued ineffective tactics.

PEOPLE & PARTNERSHIP

- Eliminated brand manager position and terminated its broker relationships, reducing costs, removing intermediaries between the company and its retailers, and eliminating silos in which each broker functioned independently rather than as an integrated cohesive sales team. These shifts allowed the sales team to manage retailer relationships directly, creating faster feedback from the channel, clearer accountability, and stronger buyer relationships.
- Hired Vdriven in an advisory role to shape go-to-market strategy and provide input on which retailers the Three Trees internal sales team should target.
- Established data as the central driver of strategic decisions, enabling rapid validation or termination of growth initiatives, which included hiring a full-time data analyst dedicated to providing granular store-level insights, competitor assessments, and promotional analysis.
- Implemented monthly three-hour deep dive sessions where the entire team analyzed performance data and developed a culture of data-informed decision making, replacing intuition with measurable outcomes.

Brands should prioritize trade spend on promotions that drive post-promo lift, not just temporary volume spikes



- A key metric for tracking promotional effectiveness is the degree of "post-promo" lift.
    - Post-promo lift indicates that consumers trial the product and then keep buying after the promo period is over.
    - Lackluster or no post-promo lift indicates that consumers opportunistically buy the product while discounted, but are not loyal and do not keep buying when it goes back to regular price.

OUTCOMES & KEY TAKEAWAYS

- Achieved target of 3x velocity (units sold per SKU per store per week) increase across key SKUs, securing nationwide distribution in all Whole Foods Market regions.
- Gained placement in Sprouts Farmers Market nationwide, becoming a top category performer.
- Realized 4x revenue growth over three years.
- Outperformed category trends during a challenging market period when many competitors experienced flat or declining sales.

INSIGHTS LEARNED

- Let data guide disciplined growth: use sales data to inform decisions, eliminate efficiencies, and hold the sales team accountable to outcomes, not effort.
- Don't be bound by conventional structures: if traditional models like brokers are not delivering, streamline operations. Build a structure that works for your brand, even if it doesn't follow industry norms.
- Scale without compromising integrity: growth and product purity are not mutually exclusive. Three Trees shows that a values-driven brand can outperform with discipline, focus, and excellent execution.