Next-Morning Swiss Farm-to-Restaurant Deliveries for Zurich and Romandie

e.g. An app that connects local farmers with restaurants who want fresh ingredients delivered daily...

PREPARED EXCLUSIVELY FOR

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Executive summary (read in 2 minutes)

Current state assessment (brutally honest)

Strategic options (3 distinct paths)

Recommended strategy (top pick)

Priority initiatives (next 90 days, ranked)

Resource requirements (people, money, tools)

Decision framework (a simple matrix for the next 10 strategic decisions)

"If I only had 1 hour" brief

Market Sizing & TAM Analysis

1) What exactly we are sizing (so the numbers stay honest)

This business is a **B2B ordering + delivery layer** between **Swiss farms** and **restaurants** in:

- **Launch:** Zürich city + nearby canton area within ~30–40 km
- **Expansion (after routes work):** Lausanne and Geneva (same "next-morning" freshness promise)

To avoid mixing apples and oranges, we size the market in two ways:

1. **Food spend moving through the platform (GMV)**

   - The annual CHF value of *fresh produce* (vegetables, fruit, herbs, salad items) that restaurants buy and could route through this service.

2. **Platform revenue**

   - Commission (6–10% of GMV) + optional CHF 299/month plan + any onboarding fees (small, one-time).

Most investors care about GMV **and** the "take-rate" revenue, because logistics businesses often scale on GMV while margins scale on take-rate.

Currency note: Switzerland runs in CHF. When a USD view helps, this chapter uses an approximate conversion **1 CHF ≈ 1.10 USD** for comparability.

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2) Top-down sizing (global → Switzerland → Zürich/Lausanne/Geneva → fresh produce → "platform-suitable")

Step A — Start from global foodservice (big picture anchor)

A large market research firm (Grand View Research) estimates the **global foodservice market** at **USD 3,099.66B in 2023**, projected to **USD 3,787.47B by 2030** (about **3.0% CAGR**).
Source: https://www.grandviewresearch.com/industry-analysis/foodservice-market-report

This global anchor matters mainly to show: restaurants are a huge spend category worldwide, but we're intentionally carving out a *small, premium, local* slice.

Step B — Narrow to Switzerland foodservice (national anchor)

A Switzerland-specific foodservice report (GlobalData) cites **Switzerland foodservice profit sector revenue of CHF 20.9B in 2023**, and forecasts a CAGR of **over 7%** during **2023–2028**.
Source: https://www.globaldata.com/store/report/switzerland-foodservice-market-analysis/

This is the national "parent market" that our Zürich/Lausanne/Geneva slice comes from.

Step C — Narrow to our exact geography (Zürich metro, Lausanne, Geneva)

We need an allocation rule that's simple and defendable. A practical proxy is: **restaurant outlet/entity concentration** is directionally aligned with foodservice spend concentration (not perfect, but useful).

Assumption (geography share): Zürich metro (within ~30–40 km), Geneva area, and Lausanne area together account for roughly **~20–25%** of Switzerland's restaurant activity/spend, given:

- They are the **most restaurant-dense and higher-spend** urban areas in Switzerland.
- They skew premium (important because your product is "verified farms + predictable delivery slots," not bargain supply).

For sizing, we take the midpoint: **22%** of Swiss foodservice revenue is in-scope.

- **In-scope foodservice revenue (all categories):**
  CHF 20.9B × 22% ≈ **CHF 4.60B**

Step D — Isolate "fresh produce" within restaurant spend

Restaurants buy many things: meat, dairy, dry goods, beverages, packaging, etc. Your service is primarily for **fresh produce** (plus possibly some farm-adjacent items later).

A conservative restaurant economics split:

- **Food cost** ≈ 30–35% of revenue (varies by concept)
- **Fresh produce share of food cost** ≈ 15–25% (varies by menu)

Base case: 32% food cost × 20% produce share = **6.4% of restaurant revenue**.

- **In-scope fresh produce spend (Top-down TAM GMV):**
  CHF 4.60B × 6.4% ≈ **CHF 295M per year**

Top-down TAM (GMV) ≈ CHF 295M/year (fresh produce only, in the specified metros).

Step E — Translate GMV to platform revenue potential

Your model: **6–10% commission**, plus optional **CHF 299/month** plan.

If the platform eventually intermediates all addressable produce GMV in-scope (theoretical ceiling, not realistic near-term):

- **TAM platform revenue from commission (theoretical):**
  CHF 295M × 8% (midpoint) ≈ **CHF 23.6M/year**

This is the "upper bound" in your current geography.

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3) Bottom-up sizing (count restaurants × average produce spend per restaurant)

Bottom-up is the "ground truth" method investors usually trust more, because it's built from units.

Step A — How many restaurant buyers are in-scope?

We only include the defined geography and operating model:

- Daily / frequent ordering
- Next-morning delivery routes
- Within ~30–40 km of fulfillment routes around Zürich, plus the Geneva and Lausanne areas

Working estimate (all restaurants, all formats) in-scope: ~6,100
This includes full-service restaurants, bistros, and also some smaller outlets; we'll filter for SAM later.

Step B — Average annual fresh produce spend per restaurant

We want something that matches real restaurant math (not wishful thinking).

Using the same produce share logic as above:

- If an average restaurant does ~CHF 750k/year in revenue (mix of small and mid-sized), and produce is ~6–7% of revenue, then:
    - CHF 750k × 6.5% ≈ **CHF 49k/year** produce spend

Base case produce spend per restaurant: CHF 50k/year
(With a realistic range: CHF 30k for small bistros up to CHF 120k+ for higher-volume kitchens.)

Bottom-up TAM GMV (fresh produce)

- 6,100 restaurants × CHF 50k/year ≈ CHF 305M/year

Bottom-up TAM (GMV) ≈ CHF 305M/year

This is reassuringly close to the top-down CHF 295M estimate (that convergence is a strong investor signal).

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4) Top-down vs bottom-up comparison (do these two methods agree?)

- **Top-down TAM (GMV):** ~CHF 295M
- **Bottom-up TAM (GMV):** ~CHF 305M

Gap is ~3–4%, which is unusually tight for early market sizing. The takeaway: **the TAM is not being inflated by a single fragile assumption**.
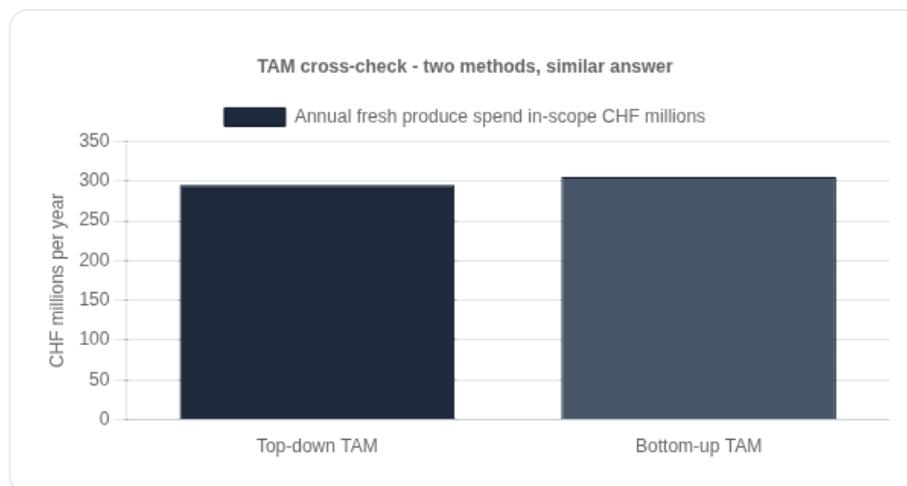
Figure 1: Side-by-side comparison of TAM estimates from the top-down and bottom-up approaches, showing a small gap and strong convergence.

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5) TAM vs SAM vs SOM (with CHF and USD)

Here's the clean breakdown for *this exact business model* and *this exact geography*.

TAM — Total Addressable Market (in-scope fresh produce GMV)

"All restaurants in the specified metros that buy fresh produce and could, in principle, order via a next-morning farm supply platform."

- **TAM GMV: CHF 305M/year** (≈ **USD 336M/year**)

SAM — Serviceable Addressable Market (best-fit segment for your differentiator)

Not every restaurant is a fit. Your best fit is:

- Independent bistros + mid-sized restaurants
- Premium/quality focus and willingness to pay for reliability
- Preference for **seasonal Swiss produce** (local sourcing)
- High value on predictable delivery windows and consolidated invoicing

Segmenting assumptions (explicit):

- Share of restaurants that are truly in your "chef-driven, quality-first" target set: **~50%**
  (excludes a lot of low-price, low-variety formats where wholesalers dominate on price)
- Share of that target set that will actively shift meaningful produce volume to "verified Swiss farms + next-morning routes": **~40%**
- Restaurants in this segment spend more on produce than the average: **CHF 75k/year** (vs CHF 50k baseline)

SAM restaurant count:
6,100 × 50% × 40% ≈ **1,220 restaurants**

SAM GMV:
1,220 × CHF 75k/year ≈ **CHF 91.5M/year** (≈ **USD 101M/year**)

SOM — Serviceable Obtainable Market (realistic share you can win in 5 years)

SOM is where competition and operational limits matter most. In Zürich/Lausanne/Geneva, restaurants already buy through:

- **Local wholesale distributors** (strong relationships, broad catalogs, credit terms)
- **Farm shops with delivery** (direct but fragmented; often limited assortment/coverage)
- **Farmy.ch** (strong online grocery brand; not purpose-built for chef procurement)
- **Cash-and-carry like Aligro** (cheap and immediate, but time cost for chefs and no next-morning "set it and forget it" delivery)

Because you're building supply + routing + trust, a reasonable 5-year win-rate in this geography is **single-digit share of SAM**, not "everyone."

Base case SOM share by Year 5: 8% of SAM

- **SOM GMV in Year 5:**
  CHF 91.5M × 8% ≈ **CHF 7.3M/year** (≈ **USD 8.0M/year**)

What that implies for platform revenue (Year 5, base case):

- Commission at 8%: CHF 7.3M × 8% ≈ **CHF 0.58M/year**
- Priority plan adoption (illustrative):
  ~1,220 SAM restaurants × 8% captured ≈ ~98 active restaurants
  If ~15% take CHF 299/month: 98 × 15% × 299 × 12 ≈ **CHF 53k/year**
- **Total platform revenue (Year 5 base case): ~CHF 0.63M/year** (plus any onboarding fees, and excluding pass-through delivery charges)

This is a **tight, realistic** SOM for the defined geography. It also tells an important story: the **first 3 metros are a proof-of-model beachhead**, and big venture scale would typically come from expanding beyond these metros (not included here because the scope is deliberately constrained).

...AM to SOM in target metros CHF millions

- SOM
- SAM not won
- TAM outside SAM

2%

28%

70%
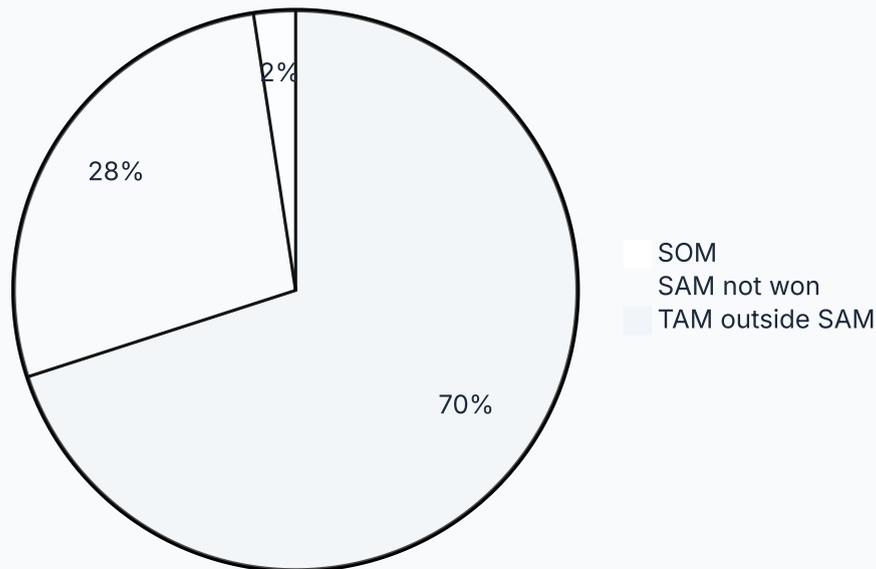
Figure 2: TAM split into three parts that add up to total TAM—SOM, the rest of SAM not captured, and the TAM portion outside the core SAM segment.

6) 5-year growth outlook (CAGR) for the in-scope opportunity

What should grow: the "serviceable" market, not just total restaurant spend

Overall restaurant spend grows with:

- population and tourism trends
- menu price inflation
- dining-out frequency

Your **SAM** (seasonal Swiss produce + reliable next-morning ordering) can grow faster than the overall restaurant market because of:

- stronger demand for **local sourcing and transparency**
- chefs wanting **time savings** (less buying runs, fewer suppliers to manage)
- digital ordering becoming normal for procurement

Chosen base-case CAGR

To keep this grounded, we align with Switzerland foodservice growth ranges from large market research firms:

- GlobalData suggests Switzerland foodservice profit sector growth of **over 7% CAGR** for 2023–2028
  Source: https://www.globaldata.com/store/report/switzerland-foodservice-market-analysis/
- Mordor Intelligence shows Switzerland foodservice growing at **~8.11% CAGR** for 2026–2031
  Source: https://www.mordorintelligence.com/industry-reports/switzerland-foodservice-market

Base case used here for SAM growth: 8% CAGR (nominal)

5-year SAM projection (CHF millions)

Starting from **CHF 91.5M** SAM in 2026:

- 2026: 91.5
- 2027: 98.8
- 2028: 106.7
- 2029: 115.2
- 2030: 124.4
- 2031: 134.3
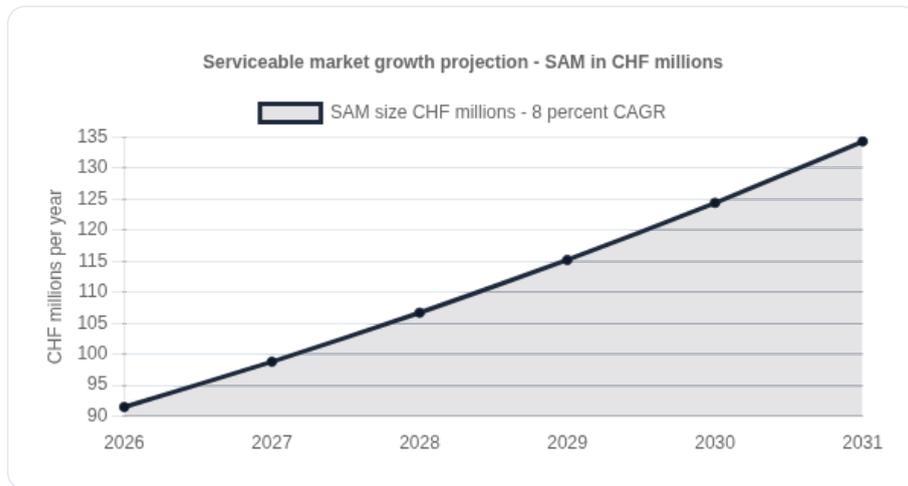
Figure 3: Projected 5-year SAM growth at an 8% CAGR, consistent with Switzerland foodservice growth ranges reported by major research firms.

7) Key assumptions (and the few that matter most)

The assumptions that drive TAM

DRIVER	BASE CASE	CONSERVATIVE	AGGRESSIVE	WHY IT MATTERS
In-scope restaurants count	6,100	5,000	7,500	Scales TAM linearly
Avg produce spend per restaurant per year	CHF 50k	CHF 40k	CHF 65k	Biggest single lever
Produce as % of revenue	6.4%	5%	8%	Cross-check with top-down

The assumptions that drive SAM

DRIVER	BASE CASE	CONSERVATIVE	AGGRESSIVE	NOTES
Share that fit "independent + mid-sized premium"	50%	40%	60%	Zurich/Geneva skew premium, but not all outlets
Share that truly prioritise seasonal Swiss produce	40%	30%	50%	Stronger in chef-led concepts
Avg produce spend in SAM	CHF 75k	CHF 60k	CHF 95k	Better restaurants buy more produce and buy more often

The assumptions that drive SOM and revenue

DRIVER	BASE CASE	CONSERVATIVE	AGGRESSIVE	COMPETITIVE REALITY CHECK
SOM share of SAM by Year 5	8%	4%	15%	Wholesalers + Aligro are sticky defaults
Avg commission rate	8%	6%	10%	Must stay within price willingness
Priority plan adoption among active restaurants	15%	5%	30%	Depends on delivery reliability and peak-slot scarcity

Investor takeaway: Even if TAM is healthy, **SOM is operationally constrained** at first by:

- building enough verified farm supply (packaging standards, consistency)
- cold-chain handling and next-morning routing density
- convincing chefs to switch away from wholesalers and/or Aligro habits

That's normal—and it's why your 3-month pilot in Zürich is a smart validation step.

Competitive Landscape Deep Dive

1) The competitive arena (Zürich first, then Lausanne + Geneva)

Restaurants in **Zürich city + ~30–40 km** typically buy fresh produce and everyday kitchen needs through a mix of:

1. **National foodservice wholesalers** (big catalog, next-day delivery routes, credit terms, account pricing)
2. **Cash-and-carry players** (chefs drive in; some delivery options, but "go pick it up" is common)
3. **Local produce wholesalers** clustered around **Zürcher Engrosmarkt / regional hubs** (strong freshness, flexible, relationship-driven)
4. **Online grocers/marketplaces** (great UX and assortment; usually built for households, not chef workflows)

Your concept (restaurant-first ordering from **verified Swiss farms**, **next-morning delivery**, **consolidated invoicing**, **predictable delivery slots**, and **seasonal menu planning**) sits *between* "local wholesaler freshness" and "national wholesaler reliability," but with a **chef-centric interface** and **multi-farm consolidation**.

2) Direct competitors — Top 10 (ranked by estimated share, revenue scale, and capital strength)

> **Important note on numbers:** Switzerland doesn't publish a neat "fresh produce to independent restaurants in Zürich" market share table. The shares below are **directional estimates** for the **Zürich launch geography** (Zürich city + ~30–40 km), based on typical channel dominance (national wholesalers > cash-and-carry > local specialists > online grocery). Use them to prioritize who to watch and how to position—*not* as audited facts.

2.1 Top 10 ranking table (Zürich launch area)

SHARE RANK	COMPANY	WEBSITE	CATEGORY	EST. SHARE IN ZÜRICH LAUNCH AREA	REVENUE SCALE (CH)	FUNDING / CAPITAL	THREAT
1	Transgourmet Schweiz / Prodega	https://www.prodega.ch/	National wholesaler + cash-and-carry	20–25%	Very large	Corporate-backed	**High**
2	Saviva	https://www.saviva.ch/	Delivery wholesale + logistics	14–18%	Very large	Corporate-backed	**High**
3	Pistor	https://www.pistor.ch/	Foodservice distribution	12–16%	Large	Corporate-backed	**High**
4	Aligro	https://www.aligro.ch/	Cash-and-carry	6–10%	Medium–large	Private company	Medium
5	TopCC	https://www.topcc.ch/	Cash-and-carry	4–8%	Medium–large	Corporate-backed	Medium
6	Reust Gastro	https://reust.ch/	Local produce wholesaler	4–8%	Medium	Private company	Medium
7	Agroform	https://www.agroform.ch/	Produce wholesaler + own production	3–7%	Medium	Private company	Medium
8	Keller Früchte + Gemüse	https://www.kellergemuese.ch/	Produce wholesaler	2–5%	Small–medium	Private company	Low–Medium
9	Ernst Welti	https://www.ernst-welti.swiss/	Engrosmarket produce wholesaler	1–4%	Small	Private company	Low–Medium
10	Farmy	https://www.farmy.ch/	Online grocery / marketplace	1–3% (B2B spillover)	Small–medium	VC-backed (reported)	Medium

3) Feature comparison (what restaurants actually feel day-to-day)

3.1 Quick comparison table (chef workflow fit)

CAPABILITY THAT MATTERS TO CHEFS	TRANSGOURMET-PRODEGA	SAVIVA	PISTOR	LOCAL PRODUCE WHOLESALERS	FARMY	YOUR CONCEPT
Next-morning delivery routes	Strong	Strong	Strong	Often strong (local)	Mixed	**Core promise**
Predictable delivery slot	Strong	Strong	Strong	Varies	Varies	**Core promise**
Restaurant-ready pack sizes	Strong	Strong	Strong	Strong	Mostly household sizes	**Core standard**
Multi-farm basket in one checkout	Not farm-first	Not farm-first	Not farm-first	Sometimes (via wholesaler)	Yes (marketplace)	**Yes, farm-first**
Consolidated invoicing across farms	Yes (as wholesaler)	Yes (as wholesaler)	Yes (as wholesaler)	Usually yes (single supplier)	Yes	**Yes, but multi-farm**
Verified farm identity + transparency	Limited	Limited	Limited	Relationship-based	Often partial	**Core differentiator**
Seasonal availability planning for menus	Limited	Limited	Limited	Relationship-based	Consumer-style	**Core differentiator**
Built for chef ordering habits (fast re-order, par levels)	Strong	Strong	Strong	Mixed	Weak	**Core differentiator**

4) Market positioning map (Price vs Value)

The market clusters into:

- **Cash-and-carry:** lower price, lower convenience/value (time cost to chef is high)
- **National wholesalers:** higher value (reliability, assortment), mid-to-high price
- **Local produce wholesalers:** strong freshness, mid price, value depends on digital convenience
- **Online grocery:** nice UI, but often not chef-optimized

Figure 1: Positioning map showing where your farm-first, chef-centric platform can sit—high value from freshness + planning + predictable delivery, at a mid-to-high price point justified by time saved and quality.

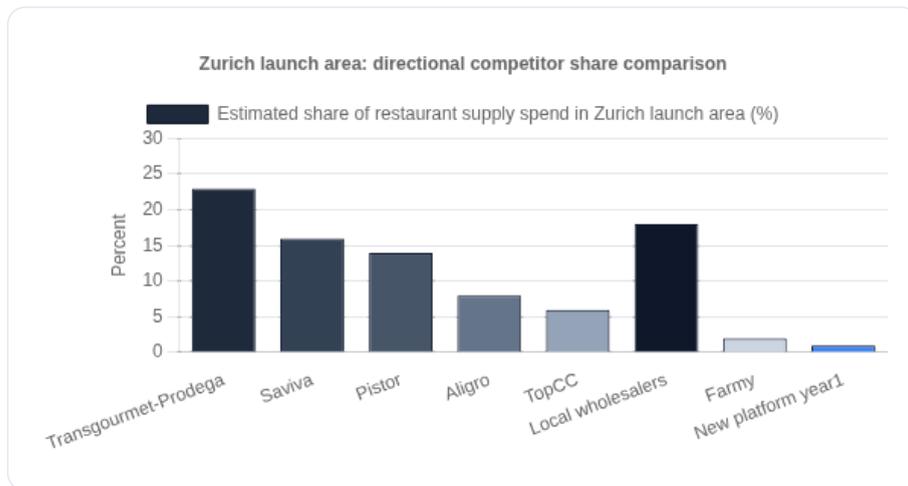## 5) Market share bar chart (estimated, Zürich launch area)

Figure 2: Directional share comparison—national wholesalers dominate; local wholesalers matter; online grocery is small for restaurant buying; your first-year share target is plausible if you win a focused set of chef accounts.

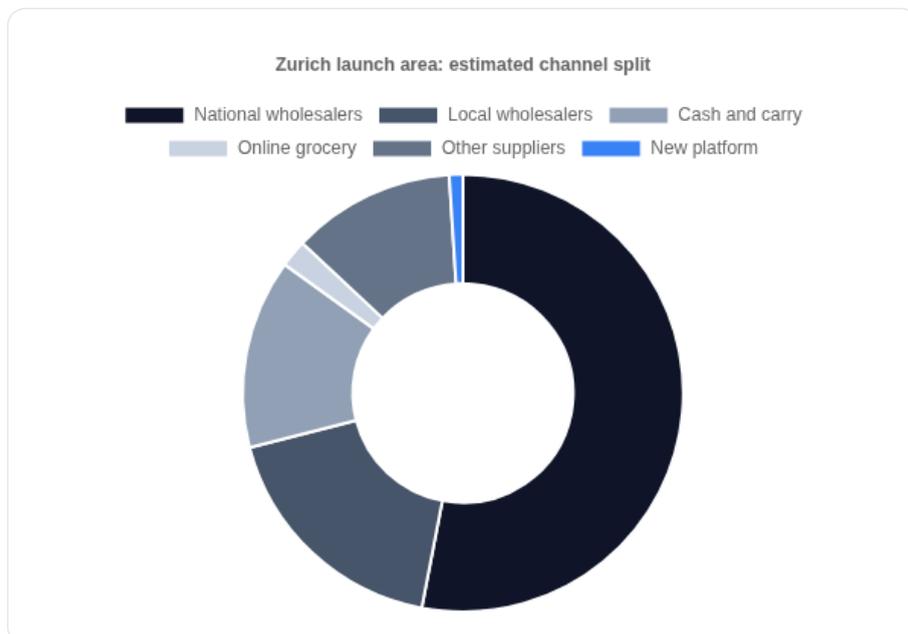## 6) Market share distribution (who controls the market "shape")

Figure 3: Channel split—your fastest wedge is usually pulling volume from local wholesalers (freshness) plus "emergency trips" to cash-and-carry (time waste), while building a service level that can later steal share from national wholesalers.

7) Competitor deep dives (direct) — pricing, features, strengths, weaknesses, moves, moats, threat

7.1 Transgourmet Schweiz / Prodega (top threat)

Website: https://www.prodega.ch/
What they are: Large Swiss foodservice wholesaler with a strong footprint and logistics; Prodega is also known for cash-and-carry formats.

ITEM	DETAILS
Pricing model	Account-based B2B pricing; broad catalog. Cash-and-carry pricing in-store. Delivery fees/conditions typically contract-based.
Key features	Huge assortment, established delivery network, predictable operations, invoicing/credit terms.
Target audience	Restaurants of all sizes; especially those that want one supplier for "almost everything."
Strengths in Zürich area	Scale routes, reliability, breadth of SKUs, strong procurement power.
Weaknesses vs your concept	Not farm-first; "local farm transparency + seasonal menu planning" is usually not the center; long-tail niche produce can be harder; personalization for small independent chefs can feel limited.
Recent strategic moves (signals)	Ongoing focus on digital ordering and hardened web operations (site protection/verification suggests high online traffic and investment in online channels).
Defensible moat	Logistics density + procurement scale + restaurant credit terms + habitual ordering ("default supplier").
Threat rating	**High** (can imitate parts of your offer if they decide it matters).

Transgourmet-Prodega homepage

Figure: Screenshot evidence from attempt to access Prodega site showing bot-protection/security verification (important because it signals strong investment in web channels and makes casual competitor scraping harder).

7.2 Saviva (top threat, very strong in delivery wholesale)

Website: https://www.saviva.ch/

ITEM	DETAILS
Pricing model	B2B account pricing (contracted); typically delivery-based wholesale with service components.
Key features	Food wholesale + logistics + digital solutions messaging; enterprise-grade service posture.
Target audience	Catering, hotels, healthcare, and foodservice buyers needing predictable supply.
Strengths in Zürich area	Professional service, route reliability, procurement breadth, operational discipline.
Weaknesses vs your concept	Less emotionally compelling "farm story"; may not optimize for chef-level seasonal planning and multi-farm transparency; can feel "big supplier" rather than chef partner.
Recent strategic moves (signals)	Clear push around "digital solutions." Public sustainability listings indicate reputational investment; also reported as part of **Transgourmet Schweiz** (corporate grouping), increasing scale and cross-selling power.
Defensible moat	Route density + service contracts + systems integration + switching costs (accounts, terms, habits).
Threat rating	**High** (they can out-execute on logistics; you must win on "chef-first + farm-first").

Saviva homepage

Figure: Saviva homepage screenshot highlighting a corporate, service-led positioning and digital-first navigation—consistent with a scaled wholesaler selling reliability to professional kitchens.

7.3 Pistor (top threat, strong distributor play)

Website: https://www.pistor.ch/

ITEM	DETAILS
Pricing model	B2B account pricing; typically negotiated lists, volume breaks, and contract terms for delivery.
Key features	B2B "online shop," multi-sector distribution (foodservice + adjacent sectors), structured customer onboarding.
Target audience	Professional buyers who value a stable distributor with ordering systems and broad categories.
Strengths in Zürich area	Systems + delivery discipline + "procurement department" level credibility.
Weaknesses vs your concept	Not inherently farm-first; seasonal menu planning and multi-farm consolidation is not the core story; local farm verification may be weaker than a farm-native marketplace.
Recent strategic moves (signals)	Strong emphasis on an **online shop** and clear conversion funnel ("become a customer"), suggesting active investment in digital ordering and customer acquisition.
Defensible moat	B2B systems + broad category coverage + route economics + long-term contracts.
Threat rating	**High** (their digital maturity can blunt your UX advantage if you're not sharply chef-optimized).

Pistor homepage

Figure: Pistor homepage screenshot showing a prominent "online shop" and customer onboarding call-to-action—evidence of strong digital distribution posture.

7.4 Farmy (direct competitor mainly on the "online marketplace" side)

Website: https://www.farmy.ch/

| ITEM	DETAILS
Pricing model	Per-item retail pricing; delivery fees and promos; subscription/loyalty style programs may apply. For restaurants, it's often "consumer ordering adapted to business needs."
Key features	Very strong web/app ordering, broad categories (produce, fish, pantry, etc.), promotions, household-first UX.
Target audience	Primarily households; some small professional buyers who value convenience.
Strengths in Zürich area	Brand recognition in Zürich, strong online experience, wide assortment, frequent promotions.
Weaknesses vs your concept	Not built for chef workflows (pack sizes, standing orders, kitchen specs, invoice controls); not optimized for "next-morning predictable slot" as a restaurant-grade SLA; farm verification and restaurant-ready standards may be inconsistent across sellers.
Recent strategic moves (signals)	Category expansion and promo tooling (e.g., "Best Price," "rescue/discount" style areas, loyalty). Public reporting indicates meaningful fundraising and scale intent (press coverage has cited multi-million CHF rounds and turnover figures).
Defensible moat	Consumer brand + marketplace supply aggregation + existing delivery operations in Zürich.
Threat rating	**Medium** (dangerous on UX/online ordering, but you can win with restaurant-specific reliability and standards).
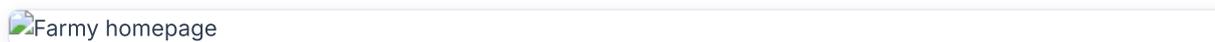
Farmy homepage

Figure: Farmy homepage screenshot showing a consumer-first marketplace positioning ("delivered to your home"), broad navigation, and promotion-heavy merchandising—strong UX, weaker restaurant specificity.

7.5 Aligro (indirect-to-direct pressure via chef habits)

Website: https://www.aligro.ch/

ITEM	DETAILS
Pricing model	Cash-and-carry shelf pricing; some services may exist for bulk buyers.
Key features	Wide assortment for "big consumers," strong promo cadence, immediate availability.
Target audience	Restaurants and other bulk buyers who accept store visits as part of procurement.
Strengths in Zürich area	Price perception, immediate pickup, flexibility for last-minute needs.
Weaknesses vs your concept	"Chef time tax" (drive, pick, queue); less predictable delivery; limited farm transparency; not built around seasonal planning for menus.
Recent strategic moves (signals)	Continues to position around "for large consumers," reinforcing volume + breadth.
Defensible moat	Physical footprint + price perception + ingrained chef routines.
Threat rating	**Medium** (not likely to out-innovate digitally, but it blocks you if chefs stay in old habits).

7.6 TopCC (similar channel dynamic to Aligro)

Website: https://www.topcc.ch/

ITEM	DETAILS
Pricing model	Cash-and-carry pricing; membership/account programs are common in this channel.
Key features	Bulk buying, promo mechanics, broad assortment.
Target audience	Restaurants and small businesses buying in-store.
Strengths in Zürich area	Price-driven shopping, ability to source many categories quickly in one trip.
Weaknesses vs your concept	Not farm-first; in-store buying doesn't solve next-morning delivery; no integrated seasonal planning.
Recent strategic moves (signals)	Ongoing emphasis on retail-style merchandising for professional buyers.
Defensible moat	Physical network + price signaling + convenience for "one emergency run."
Threat rating	**Medium**.

7.7 Reust Gastro (local produce wholesaler threat)

Website: https://reust.ch/

ITEM	DETAILS
Pricing model	B2B list pricing + relationship-based terms; often flexible on specials and availability.
Key features	Fresh produce focus, local service, kitchen-ready options may be available.
Target audience	Independent restaurants that care about freshness and personal service in Zürich and nearby areas.
Strengths in Zürich area	Freshness, speed, relationships, flexibility.
Weaknesses vs your concept	Digital ordering UX may be less modern; multi-farm transparency is usually "trust me" rather than structured verification; menu-planning tools uncommon.
Recent strategic moves (signals)	Many local wholesalers have been expanding convenience/ready-to-use offerings and basic online ordering to reduce phone/fax orders (industry-wide shift).
Defensible moat	Local relationships + ability to solve problems quickly + quality consistency.
Threat rating	**Medium** (closest to your freshness promise; you must beat them on convenience and transparency).

7.8 Agroform (produce wholesaler + own production)

Website: https://www.agroform.ch/

ITEM	DETAILS
Pricing model	B2B pricing; often a mix of own production and sourced items.
Key features	Produce plus prepared/convenience items; "kitchen-ready" angle is common in this profile.
Target audience	Restaurants wanting produce plus time-saving prep products.
Strengths in Zürich area	Product depth in produce, potential differentiation via own production and consistent standards.
Weaknesses vs your concept	Less of a multi-farm marketplace; transparency and seasonal menu planning may not be productized.
Recent strategic moves (signals)	Emphasis on wide assortment including ready/prepped products (helps kitchens reduce labor).
Defensible moat	Own production + supply control + relationships with kitchen buyers.
Threat rating	**Medium**.

7.9 Keller Früchte + Gemüse (smaller-scale produce distribution)

Website: https://www.kellergemuese.ch/

ITEM	DETAILS
Pricing model	B2B pricing for commercial customers; delivery-based.
Key features	Fresh produce supply, potentially some prepared or frozen extensions.
Target audience	Commercial buyers needing consistent produce deliveries.
Strengths in Zürich area	Specialization, service, local responsiveness.
Weaknesses vs your concept	Harder to match "multi-farm + one invoice + seasonal planning" unless they rebuild their model; digital UX may be basic.
Recent strategic moves (signals)	Typical small wholesaler play: protect core accounts with service reliability and niche sourcing.
Defensible moat	Local trust + specialized sourcing.
Threat rating	**Low–Medium**.

7.10 Ernst Welti (Engrosmarket-style specialist)

Website: https://www.ernst-welti.swiss/

ITEM	DETAILS
Pricing model	B2B wholesale pricing; often strongest for early/market-style purchasing.
Key features	Freshness, selection, ability to choose product directly (marketstand dynamic).
Target audience	Chefs who want hands-on selection and are willing to buy through market routines.
Strengths in Zürich area	Freshness perception and selection control.
Weaknesses vs your concept	Less delivery-first; not built around predictable slots, consolidated multi-farm ordering, or menu planning tools.
Recent strategic moves (signals)	Many Engrosmarket players emphasize daily freshness and breadth rather than software-led convenience.
Defensible moat	Freshness reputation + buyer habits at the market.
Threat rating	**Low–Medium**.

8) Indirect competitors — 5 adjacent companies that could enter (or partner, then compete)

These aren't "your exact model" today, but they have assets that could let them move into **chef-grade next-morning procurement** in Zürich (then Lausanne/Geneva).

ADJACENT PLAYER	WEBSITE	WHY THEY COULD ENTER	LIKELY ENTRY PATH	THREAT
Migros (Migros Online + B2B capabilities)	https://www.migros.ch/	Huge supply base, logistics, brand trust	Launch a "Migros for Chefs" ordering layer or acquire a B2B marketplace	Medium–High
Coop (Coop.ch + group logistics)	https://www.coop.ch/	Scale logistics + procurement + quality standards	Build a chef ordering portal with guaranteed morning slots	Medium–High
Swiss Post Logistics	https://www.post.ch/	Nationwide delivery + cold-chain partners possible	Offer "last-mile + cold crates" services to a marketplace	Medium
Planzer (Swiss logistics)	https://planzer.ch/	Strong logistics + route density	Become the delivery backbone for farm-to-restaurant networks	Medium
Smood (Swiss delivery platform)	https://smood.ch/	Local courier networks and dispatch software	Add "B2B ingredients" vertical for restaurants	Medium

9) Competitive moats (what makes each player hard to beat)

9.1 Moat summary table (plain-English)

PLAYER	WHAT PROTECTS THEM	WHAT *DOESN'T* PROTECT THEM (YOUR OPENING)
Transgourmet-Prodega	Dense delivery routes, huge assortment, purchasing power, chef habit	Less farm-first transparency; less "seasonal planning" product; can feel impersonal
Saviva	Service contracts, logistics discipline, digital tooling, corporate backing	Farm identity and menu planning not core; room for a chef-first specialist
Pistor	Strong online ordering, B2B processes, category breadth	Farm-level story and seasonal planning can be weaker
Aligro	Physical footprint, price perception, ingrained shopping behavior	Doesn't remove chef time cost; not delivery-first
TopCC	Same channel advantages as Aligro	Same weaknesses: time cost + weak farm-first proposition
Reust Gastro	Relationships, freshness reputation, flexibility	Digital UX and multi-farm consolidation can be beatable
Agroform	Own production, consistency, kitchen-ready items	Marketplace breadth + farm verification across multiple farms is harder for them
Keller Gemüse	Local trust and specialization	Scale, tech experience, and multi-farm consolidation are difficult
Ernst Welti	Freshness selection control, market routine	Delivery reliability and software convenience are the gap
Farmy	Strong online UX, marketplace aggregation, brand	Not chef-optimized; restaurant-grade SLA and standards are the wedge

9.2 Your moat (what you must build on purpose)

To be defensible against "big wholesalers copying features," your moat should be a **system**, not a single feature:

- **Verified farm network** with standards (pack sizes, labeling, cold-chain handling, rejection rules)
- **Chef-first ordering speed** (30-second reorder, saved baskets by menu, substitutes rules)
- **Seasonality planning engine** (what's coming next weeks, menu prompts, "swap suggestions")
- **Route + slot reliability** (predictability beats "cheap")
- **Multi-farm consolidation layer** (one checkout + one invoice + clear farm-level traceability)

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10) White space analysis (gaps nobody is truly filling in Zürich)

1. **True chef workflow built around tomorrow's prep**
   Most platforms sell "order groceries." Few sell "set tomorrow's mise-en-place with confidence."

2. **Farm-first transparency *plus* restaurant-ready standards**
   Restaurants want the farm story *and* predictable size, ripeness, and packaging.

3. **Multi-farm ordering that still feels like one supplier**
Marketplaces often feel fragmented (different rules, different fulfillment). Wholesalers feel consolidated but not farm-first.

4. **Seasonal availability that drives menu decisions**
"What's best next week?" is usually handled by relationships and ad-hoc calls—not productized.

5. **Predictable delivery slots for independents (not just large accounts)**
Big wholesalers excel here for big customers. Independents often get "sometime in the morning." Your paid plan can make "predictable slot" a product.

6. **Quality guarantee designed for produce**
Clear rules: if something arrives wrong, what happens *by 9:30 am* so service isn't ruined?

11) Threat assessment (who can hurt you most, and how)

11.1 Threat ratings table (Zürich launch)

COMPETITOR	THREAT	HOW THEY HURT YOU	YOUR BEST COUNTER
Transgourmet-Prodega	High	Bundles produce into a one-stop contract and wins on reliability	Win on farm verification + chef planning + superior freshness consistency
Saviva	High	Enterprise-grade delivery and service; can copy "priority slots"	Own the chef experience and seasonal planning; partner with standout farms
Pistor	High	Strong digital ordering + distribution discipline	Be faster for chefs (reorder + substitutes + menu prompts) and farm-first
Aligro	Medium	Keeps chefs in "pickup habit," reducing willingness to pay delivery fees	Show ROI: time saved + fewer stockouts; target next-morning reliability
TopCC	Medium	Same as Aligro; price anchor	Position as "freshness + predictability," not "cheapest box"
Reust Gastro	Medium	Matches freshness and relationships locally	Beat them on convenience and multi-farm breadth with stable standards
Agroform	Medium	Wins with kitchen-ready convenience products	Start with produce excellence, then add select kitchen-ready lines via farms/partners
Keller Gemüse	Low–Medium	Defends a small base with strong service	Don't chase; win chefs who want transparency + planning
Ernst Welti	Low–Medium	Retains chefs who want to personally select produce	Offer "selection-grade" specs and a no-hassle quality guarantee
Farmy	Medium	Strong UX and broad assortment draws small buyers	Differentiate hard: restaurant pack sizes, invoicing controls, guaranteed slots

12) What this means for your Zürich go-to-market (competitive takeaways)

- **Your first wins will come from pain, not preference:** restaurants that hate last-minute procurement runs, inconsistent produce quality, and unpredictable delivery timing.

- **Competing head-on with national wholesalers on catalog breadth is a trap:** instead, win a **produce-led wedge** (seasonal Swiss farms, chef-ready standards) and expand baskets over time.

- **The "priority delivery" plan is strategically smart:** it turns reliability into a product and helps you avoid being priced like a commodity marketplace.

- **Local wholesalers are your most immediate "close substitute":** beat them with speed + transparency, not with a lower price.

Customer Persona & Segmentation

1) The 4 customer segments (Zürich launch first, then Lausanne + Geneva)

Even though "restaurants" sounds like one group, the buying job is very different depending on volume, who does the ordering, and how tight delivery windows are. For Zürich city + nearby canton (30–40 km), these are the four segments that matter most for a next-morning farm-to-restaurant service.

Segment A — Seasonal chef-owner bistros (quality-first, time-poor)

- **Typical venue:** 30–70 seats, changing seasonal menu, independent
- **Who buys:** Owner-chef or head chef
- **What they care about:** Taste, story of the farm, consistency, "menu inspiration"
- **Today's alternatives:** Weekly markets, a favorite farm shop that delivers, sometimes **Aligro** for gap-filling, plus occasional wholesaler orders
- **Why they're a fit:** They feel the pain personally (ordering steals cooking time) and value "restaurant-ready" quality more than squeezing every cent

Segment B — Mid-sized restaurants with a purchasing lead (process-first, invoice-heavy)

- **Typical venue:** 80–200+ covers/day, brasserie, larger independent, or small group with 2–4 locations
- **Who buys:** Purchasing manager, operations manager, or a chef with procurement responsibility
- **What they care about:** Predictable delivery slots, fewer suppliers to manage, clean invoices, stable availability
- **Today's alternatives:** Local wholesale distributors, cash-and-carry backstops like **Aligro**, and occasional direct farm relationships
- **Why they're a fit:** Consolidated invoicing + reliable next-morning delivery can beat the admin pain of multi-supplier buying

Segment C — Boutique hotels + catering kitchens (reliability-first, strict windows)

- **Typical venue:** Hotel restaurant, banquet kitchen, boutique hotel, catering that preps early
- **Who buys:** Kitchen manager / sous chef + admin team (sometimes with strict vendor onboarding)
- **What they care about:** Delivery precision, cold-chain discipline, documented standards, low waste
- **Today's alternatives:** Established distributors (because "no surprises"), sometimes farm shops for premium items, sometimes **Farmy.ch** for small urgent needs (but not designed for restaurant workflows)

- **Why they're a fit:** Next-morning with predictable slots + cold-chain crates can be a strong switch reason—if reliability is proven

**Segment D — Modern fast-casual and "digital-first" concepts (speed + simplicity)**

- **Typical venue:** Bowl/salad concepts, trendy cafés with high lunch volume, small chains, canteens with modern ops
- **Who buys:** Ops chef, kitchen lead, or founder-operator
- **What they care about:** Fast reordering, clear pricing, minimal friction, fewer stockouts
- **Today's alternatives:** Wholesalers for bulk, **Aligro** for emergencies, sometimes online ordering (including **Farmy.ch**) for convenience—but it's not tailored to daily restaurant routines
- **Why they're a fit:** If ordering is truly quick and repeatable, they can become frequent, high-order users

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2) Segment sizing (share of the addressable restaurant buyers)

These percentages are an **educated estimate** of the *serviceable* restaurant buyers in **Zürich city + ~30–40 km** that match your positioning (fresh produce focus + frequent ordering + willingness to pay for reliability). Real shares will vary by neighborhood and restaurant density, but this is a practical split for planning your 10–15 restaurant validation.

- **Segment A — Seasonal chef-owner bistros: 34%**
  - Zürich has many independents where the chef-owner controls suppliers and values local seasonal produce.

- **Segment B — Mid-sized with purchasing lead: 28%**
  - Fewer venues than Segment A, but they represent a meaningful chunk of steady volume.

- **Segment C — Boutique hotels + catering kitchens: 16%**
  - Smaller count, but high standards and strong need for reliable early deliveries.

- **Segment D — Modern fast-casual and digital-first concepts: 22%**
  - Growing set of concepts optimized for fast operations and frequent reordering.

Segment share Zurich launch

- Chef owner
- Purchasing lead
- Hotel catering
- Fast casual
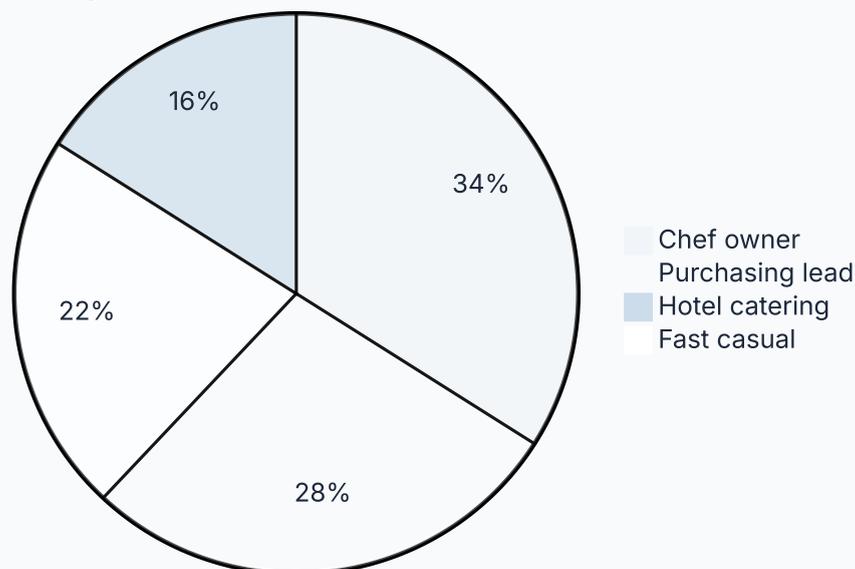
3) Personas (4 deep profiles tied to the segments)

Persona 1 — Luca, chef-owner of a seasonal bistro (Segment A)

Demographics

- **Age:** 38
- **Income:** CHF 110k–150k (owner draw varies by season)
- **Education:** Swiss culinary apprenticeship + short business courses
- **Location:** Zürich (Kreis 4/5), sources within Zürich + nearby canton
- **Job title:** Owner-chef / Küchenchef

Psychographics (values + personality)

- Proud of "real ingredients" and Swiss provenance
- Chooses suppliers that make the menu better (not just cheaper)
- Strong personal standards; gets frustrated when others "don't care"
- Likes simple tools; hates bureaucracy
- Wants to feel in control (and hates last-minute surprises)

Top 5 daily pain points

1. **Time drain:** Ordering takes time he should spend on prep and service.
2. **Unpredictable availability:** Seasonal items disappear without warning.
3. **Supplier juggling:** Multiple small suppliers = many calls, messages, invoices.
4. **Inconsistent quality:** Same item can vary a lot week to week.
5. **Last-minute gaps:** When something is missing, he ends up at **Aligro** early morning.

Goals & aspirations (what "success" looks like)

- A menu that changes smoothly with the seasons, without chaos in the kitchen
- Reliable next-morning ingredients so service runs calm
- Reduce admin so he can focus on food and guests
- Build a reputation for "local Swiss produce done right"

Buying behavior (discover → evaluate → purchase)

- **Discover:** Word of mouth from other chefs, local farm connections, Gastro events, Instagram posts from farms/chefs
- **Evaluate:** Wants proof fast—sample order, farm verification, clear photos/grades, and a delivery trial during a busy week
- **Purchase:** Starts with 5–10 high-impact items (greens, herbs, tomatoes, mushrooms), then expands if reliability holds
- **Competitor context:** May already use a farm shop delivery for a few items; sees **Farmy.ch** as "nice but not built for restaurant mornings"; uses **Aligro** as the emergency button

Media consumption

- **Online:** Instagram (chefs/farms), YouTube for technique, Google Maps reviews (to track peers), WhatsApp groups with other chefs
- **Offline:** Weekly markets, farm visits, chef meetups, trade reps visiting kitchens

Top 3 objections (why he'd say no)

1. "I already have my people—my farm shop and my distributor."
2. "If you miss a delivery once, my service is ruined."
3. "I don't want to pay extra fees unless quality is clearly better."

Trigger events (when he actively searches)

- A key supplier misses delivery twice in a month
- A new seasonal menu launch is coming and he needs dependable supply
- Staff shortage (no one has time to run to markets / **Aligro**)

Willingness to pay (price sensitivity)

- **Delivery fee:** Comfortable at **CHF 10–15** if delivery is truly next-morning and consistent
- **Service fee:** Accepts **6–9%** when it replaces multiple supplier hassles
- **Monthly plan:** Will consider **CHF 250–320/month** if it guarantees priority slots and reduces emergency runs

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Persona 2 — Sophie, purchasing lead for a mid-sized restaurant group (Segment B)

Demographics

- **Age:** 45
- **Income:** CHF 120k–145k
- **Education:** Hospitality management school + procurement training
- **Location:** Zürich + nearby canton (sometimes multiple sites, e.g., Zürich + Winterthur area)
- **Job title:** Purchasing manager / Operations manager

Psychographics (values + personality)

- Calm, structured, and accountability-driven
- Values predictability over novelty
- Cares about supplier professionalism: invoices, terms, reliability
- Doesn't want "farm romance"; wants operational certainty
- Optimizes for fewer problems, not just lowest price

Top 5 daily pain points

1. **Invoice overload:** Many suppliers = messy reconciliation and chasing documents.
2. **Supplier inconsistency:** Different quality standards across sources.
3. **Delivery slot chaos:** Late deliveries disrupt prep across sites.
4. **Communication noise:** Too many calls, texts, and exceptions.
5. **Price swings:** Seasonal volatility makes budgeting harder.

Goals & aspirations

- One ordering flow that works across locations
- Fewer suppliers, fewer errors, cleaner admin

- Predictable delivery windows that kitchens can plan around
- A "local produce" story that marketing can use—without ops pain

Buying behavior

- **Discover:** Referrals from other operators, LinkedIn, suppliers approaching with a clear one-pager, trade associations
- **Evaluate:** Asks for clear terms: SLAs (informal is fine), invoice format, delivery cutoffs, substitution rules, and proof of farm standards
- **Purchase:** Pilot with one location first, then expand if the numbers and reliability work
- **Competitor context:** Likely entrenched with a local wholesale distributor; sees **Aligro** as backup; views **Farmy.ch** as consumer-oriented and not a procurement system

Media consumption

- **Online:** LinkedIn, industry newsletters, operator communities, Excel/Google Sheets heavy
- **Offline:** Vendor meetings, tastings, association events, local trade shows

Top 3 objections

1. "Switching suppliers is risk—we can't disrupt operations."
2. "Your pricing looks variable; I need predictability."
3. "I need consolidated invoicing and clean credit terms—can you handle that?"

Trigger events

- New site opening (new supplier decisions happen quickly)
- Current distributor changes terms or raises prices sharply
- A quality issue causes guest complaints, forcing a supplier review

Willingness to pay

- **Delivery fee: CHF 8–12** if slots are predictable and consolidated invoicing is strong
- **Service fee:** Accepts **6–10%** if total admin time drops (and waste goes down)
- **Monthly plan:** Will pay **CHF 320–450/month** if it protects delivery slots and reduces failure risk across sites

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Persona 3 — Nadia, kitchen manager in a boutique hotel restaurant (Segment C)

Demographics

- **Age:** 33
- **Income:** CHF 85k–105k
- **Education:** Culinary training + HACCP/food safety certifications
- **Location:** Zürich (lake area / central), deliveries must be precise
- **Job title:** Kitchen manager / Sous chef (runs morning prep)

Psychographics

- Reliability-obsessed (because breakfast/lunch timings are unforgiving)
- Low tolerance for supplier excuses
- Cares deeply about food safety and cold-chain discipline
- Wants fewer surprises, fewer substitutions
- Appreciates premium quality, but only if operationally safe

Top 5 daily pain points

1. **Tight timing:** Early prep means late deliveries are a real problem.
2. **Standards compliance:** Temperature control, packaging, labeling must be consistent.
3. **Substitutions:** Unapproved swaps break menus and allergen planning.
4. **Waste risk:** Over-ordering "just in case" leads to spoilage.
5. **Coordination:** Needs deliveries to match staff schedules and storage capacity.

Goals & aspirations

- Smooth mornings: deliveries arrive when expected, in usable condition
- Confidence that "farm-fresh" won't create compliance headaches
- Less waste, better forecasting, fewer emergency store runs
- A credible local sourcing story the hotel can stand behind

Buying behavior

- **Discover:** Through hotel procurement network, chef referrals, vendor onboarding lists
- **Evaluate:** Requires a reliability trial, clear delivery slot commitments, packaging standards, and substitution rules
- **Purchase:** Starts with produce categories where freshness is visible (berries, salad greens, herbs), then expands
- **Competitor context:** Likely uses a distributor for stability; might use a farm shop delivery for premium items; may have tried **Farmy.ch** for urgent small orders but finds it not "restaurant-ready" or operationally predictable

Media consumption

- **Online:** LinkedIn, hotel/hospitality groups, supplier portals, email
- **Offline:** Vendor tastings, hotel procurement meetings, local chef networks

Top 3 objections

1. "If you can't guarantee cold-chain and timing, we can't use you."
2. "We can't deal with packaging that isn't storage-friendly."
3. "We need predictable ordering cutoffs and clear substitution rules."

Trigger events

- A late delivery causes breakfast/lunch prep stress
- A compliance audit highlights gaps in supplier documentation/standards
- Peak season staffing pressure makes reliability more valuable than ever

Willingness to pay

- **Delivery fee: CHF 10–15** if delivery timing and handling are excellent
- **Service fee:** Accepts **7–10%** when it reduces waste and prevents operational failures
- **Monthly plan: CHF 299–420/month** if it comes with priority slots, strict handling, and fewer "surprises"

Persona 4 — Marc, ops chef at a modern fast-casual concept (Segment D)

Demographics

- **Age:** 29
- **Income:** CHF 75k–95k

- **Education:** Culinary apprenticeship; very comfortable with apps/tools
- **Location:** Zürich (multiple lunch-heavy sites possible; tight restock needs)
- **Job title:** Ops chef / Kitchen lead / Founder-operator (small chain)

Psychographics

- Speed-focused and systems-minded
- Wants tools that feel "two taps, done"
- Likes transparency and quick comparisons
- Not sentimental about suppliers—will switch if it's clearly easier
- Hates anything that slows service or increases mistakes

Top 5 daily pain points

1. **Stockouts hurt sales:** Missing one key item can break the lunch rush.
2. **Reordering friction:** Too many steps to repeat yesterday's order.
3. **Unclear pricing:** Hard to predict cost per portion when prices change.
4. **Delivery timing:** Needs tight windows to avoid disrupting prep and service.
5. **Team discipline:** New staff make ordering mistakes without a simple system.

Goals & aspirations

- Always in-stock for peak service
- Fast reorder flows with clear "par levels" (minimum stock targets)
- Stable quality that keeps portioning consistent
- Scale to another location without doubling admin

Buying behavior

- **Discover:** Google search, referrals, operator communities, Instagram/LinkedIn, seeing a competitor use it
- **Evaluate:** Wants a fast demo, clear pricing, and proof reorder is easy; looks for predictable cutoffs and delivery windows
- **Purchase:** Starts with high-frequency staples (salad mixes, cucumbers, tomatoes, fruit), then expands if performance is reliable
- **Competitor context:** Uses wholesalers for bulk; uses **Aligro** for emergencies; may have tried **Farmy.ch** for convenience but finds it not optimized for daily restaurant operations

Media consumption

- **Online:** Instagram, YouTube, Google, WhatsApp groups, some LinkedIn
- **Offline:** Operator meetups, supplier tastings, casual networking with other founders

Top 3 objections

1. "This feels like it's built for chefs, not for fast operations."
2. "Fees will kill my margins—prove it reduces waste or saves labor."
3. "If substitutions happen, my standardized menu breaks."

Trigger events

- A stockout causes a bad service day (immediate motivation)
- Opening a new location (needs better systems)
- A price hike from a distributor pushes them to seek alternatives

Willingness to pay

- **Delivery fee: CHF 8–10** (more sensitive) unless it clearly prevents stockouts

- **Service fee:** Prefers **6–8%** and will negotiate hard

- **Monthly plan: CHF 200–299/month** unless it includes features that save labor (fast repeat orders, favorites, clear availability)
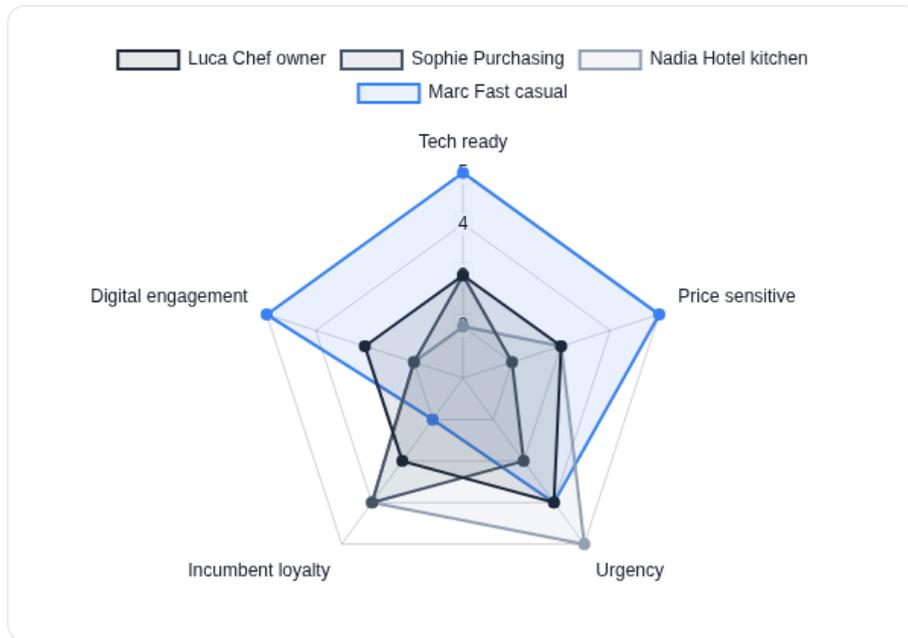

Figure 2: Radar comparison of the four personas on traits that most affect adoption in a Zürich next-morning farm delivery product.

4) Willingness to pay by segment (what to charge, and where it will break)

You effectively have two pricing "levers" that restaurants will react to differently:

1. **Per delivery fee (CHF 8–15)**

- Feels fair when it replaces a staff run (markets/**Aligro**) and comes with a reliable slot.

- Be careful: if the delivery fee feels like "paying for your logistics," chefs will compare you to their distributor's delivery terms.

2. **Service fee / commission (5–10%)**

- Easiest to accept when it's framed as: "We handle farm sourcing + consolidation + next-morning delivery."

- Hardest to accept on commodity items where they already have a low-price wholesaler.

3. **Monthly plan (CHF 250–400+)** for priority delivery / guaranteed slot

- Works best where **failure cost is high** (hotel kitchens, multi-site groups, busy chef-owners).

- Will struggle in fast-casual unless the plan obviously prevents stockouts or saves labor via faster ordering.

Segment-by-segment price sensitivity (practical guidance)

- **Segment A Chef-owner:** Medium sensitivity
    - They'll pay if quality and "no surprises" is real. One missed delivery can wipe out goodwill.

- **Segment B Purchasing lead:** Lower sensitivity *if* admin savings are visible
    - They can justify cost with fewer invoices, fewer supplier calls, and fewer exceptions.

- **Segment C Hotel catering:** Lower sensitivity for reliability
    - They pay to avoid operational failure, but only after you prove standards and cold-chain handling.

- **Segment D Fast casual:** High sensitivity
    - Needs a tight story: fewer stockouts, less waste, less labor, faster reorder.
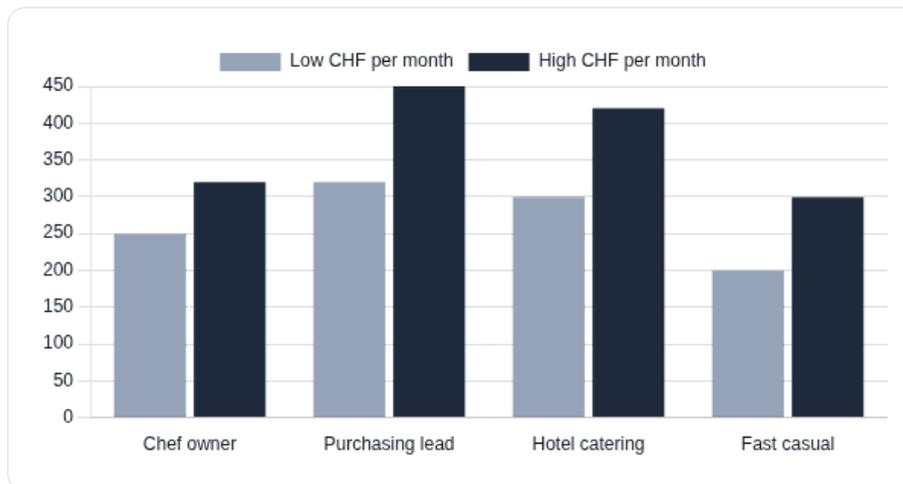
Figure 3: Monthly plan willingness-to-pay ranges by segment for Zürich launch, based on how much each persona values guaranteed delivery and reduced operational risk.

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5) Prioritization matrix (who to target first in the 10–15 restaurant validation)

To move fast in Zürich, prioritize segments where:

- The pain is frequent (daily/near-daily),
- The cost of failure is high (they *need* next-morning),
- And switching is realistic (they can trial without a long procurement cycle).

Scoring dimensions (simple and practical)

- **Value if won (1–5):** order frequency + margin potential + retention likelihood
- **Ease to win (1–5):** speed of decision + ability to trial + low bureaucracy
- **Risk if you fail (1–5):** reputational/operational risk from a missed delivery (higher means you must be more careful)

SEGMENT	VALUE IF WON	EASE TO WIN	RISK IF YOU FAIL	WHY IT LANDS HERE
A Chef owner	4	4	4	Fast decisions and strong fit, but reliability must be excellent
B Purchasing lead	5	3	3	Big upside via repeat volume and multi-site expansion, slightly slower decisions
C Hotel catering	4	2	5	Great WTP for reliability, but toughest standards and highest failure cost
D Fast casual	4			

Customer Persona & Segmentation

1) The 4 segments that matter in Zürich first (and why)

In **Zürich city + ~30–40 km**, restaurants that care about seasonal Swiss produce usually fall into a few repeatable buying "styles." The same business can be "small" or "big," but what really changes how they buy is:

- **How often they order** (daily vs 2–3 times a week)
- **How painful a late delivery is** (a lunch service problem vs a mild inconvenience)
- **How much they care about provenance** (farm story, varietals, sustainability)
- **How much admin they can tolerate** (many invoices, many messages, many suppliers)
- **How digital they are** (WhatsApp + phone vs proper ordering tools)

Below are **4 core segments** that fit your Zürich-first launch and your promise: **next-morning, restaurant-ready orders from verified Swiss farms**, with **predictable slots** and **menu planning from seasonal availability**.

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2) Segment sizing (share of the target market in Zürich launch area)

These are **share-of-addressable-customer estimates** for the *early* Zürich launch area (restaurants that would plausibly switch at least some produce buying to a farm-to-restaurant next-morning service). They're meant for **prioritization**, not as "official statistics."

Segment definitions (what each % includes)

1. **Chef-owner bistros and small independents**
   Small teams, high time pressure, decisions made by the chef-owner.

2. **Purchasing-led mid-sized restaurants**
   Slightly bigger operations with someone responsible for ordering, cost control, and supplier reliability.

3. **High-volume kitchens with strict routines**
   Brasseries, busy casual dining, canteens; predictable menus, big volumes, and low tolerance for surprises.

4. **Fine-dining and provenance-first kitchens**
   Quality and story matter most; they will pay for exceptional produce and reliability, but they are picky.

Estimated share of early addressable customers (Zürich + 30–40 km)

- **Chef-owner bistros and small independents: 35%**
- **Purchasing-led mid-sized restaurants: 25%**
- **High-volume kitchens with strict routines: 25%**
- **Fine-dining and provenance-first kitchens: 15%**
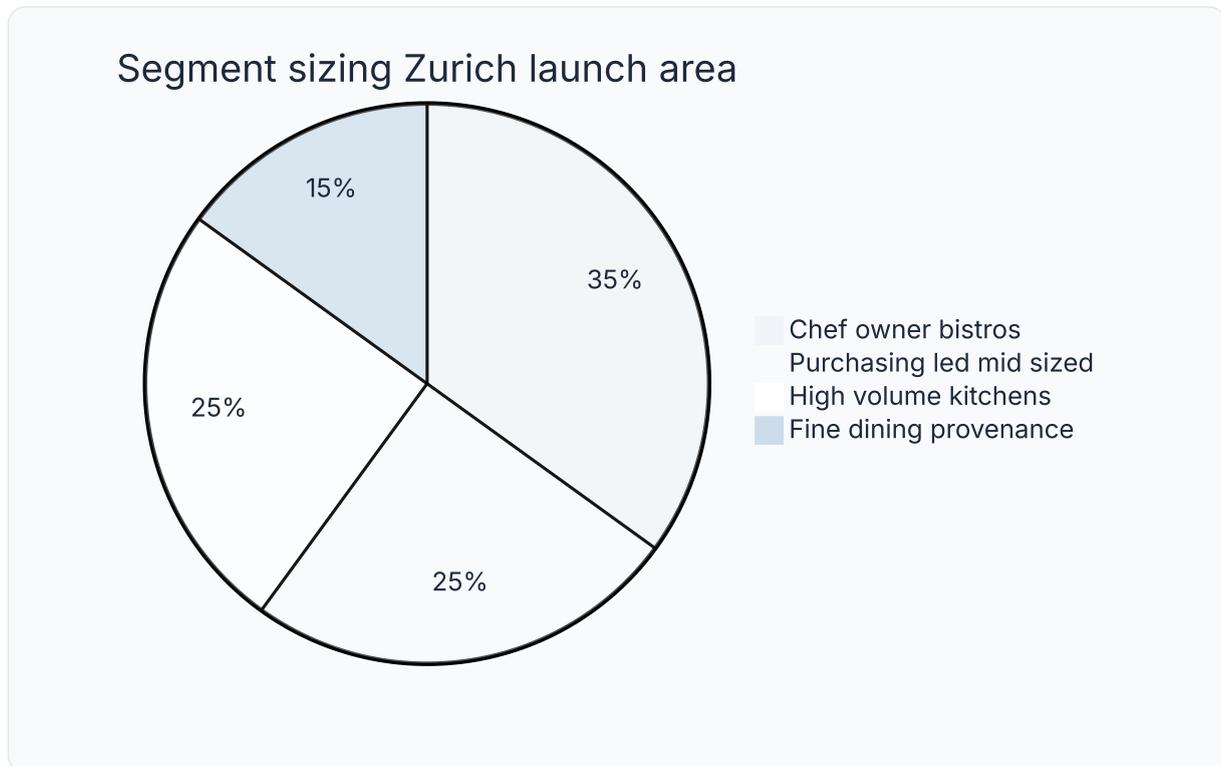
Figure 1: Estimated distribution of addressable restaurant customers by segment in Zürich city plus nearby canton radius.

3) Persona 1 — The Chef-Owner Bistro Operator

Snapshot

- **Who:** Chef-owner running a 40–80 seat bistro in Zürich (or nearby towns like Winterthur, Dietikon, Uster), seasonal menu, small team.
- **Why they fit you:** They're time-poor, want Swiss seasonal quality, and hate supplier chaos. They currently patchwork buy from **Aligro**, markets, and a couple of trusted distributors.

Demographics

- **Age:** 32–48
- **Income:** CHF 90k–160k personal income (varies a lot by profitability); business cash flow is the real constraint
- **Education:** Culinary apprenticeship (EFZ) or similar; some have hospitality school background
- **Location:** Zürich city, Zürich canton within 30–40 km radius
- **Job title:** Owner, Chef-owner, Küchenchef Inhaber

Psychographics

- **Values:** Craft, local relationships, credibility with guests, "no shortcuts" on food quality
- **Beliefs:** Freshness and consistency are worth paying for; waste is a sin; reliable suppliers are partners
- **Lifestyle:** Long hours, service-driven schedule; limited time for admin
- **Personality traits:** Hands-on, decisive, skeptical of "tech for tech," but open if it saves time

Pain points (top 5 daily frustrations)

1. **Morning scramble** when something is missing or low quality
2. **Too many supplier messages and invoices** (admin pile-up after service)
3. **Unpredictable availability** of seasonal items (menu planning becomes guesswork)
4. **Quality inconsistency** (same product name, different reality week to week)
5. **Time wasted sourcing** (Aligro trips, market runs, last-minute calls)

Goals & aspirations (what success looks like)

- A menu that feels **seasonal and "Swiss honest"** without constant fire-fighting
- **Fewer supplier headaches** so they can focus on cooking and team leadership
- Better **gross margin control** (less waste, fewer emergency purchases)
- Being known for "we always have great produce" without paying fine-dining prices every day

Buying behavior (discover → evaluate → purchase)

- **Discover:** Word-of-mouth from other chefs, local farmer relationships, Instagram food community, supplier reps, trade events (e.g., Igeho / ZAGG)
- **Evaluate:** Will test with 1–2 weeks of real orders; judges on punctuality, produce condition, replacements, and how easy it is to reorder
- **Purchase pattern:** Frequent small-to-medium orders, often finalized after service (late evening) for next morning
- **Decision drivers:** Reliability > quality consistency > admin simplicity > price
- **Competitor "default" today:** Aligro for breadth and immediacy; a local distributor for staples; occasionally **Farmy.ch** as an "online convenience backup," but often not optimized for restaurant workflows

Media consumption (online + offline)

- **Online:** Instagram (chef network + inspiration), YouTube (techniques), Google Maps reviews (competitive awareness), WhatsApp groups with other chefs
- **Industry:** Gastrojournal, restaurant association newsletters, local supplier updates
- **Offline:** Tastings, farmer visits, markets (Bürkliplatz, etc.), chef meetups

Objections (top 3 reasons they'd say no)

1. **"I can't risk a failed delivery."** One missed next-morning drop can wreck lunch prep
2. **"Selection will be too narrow."** They still need breadth (and don't want two ordering workflows)
3. **"It'll cost more than my current mix."** They fear a slow margin leak via fees + higher unit prices

Trigger events (when they actively search)

- A supplier lets them down before a busy service
- A new seasonal menu launch where they want dependable Swiss produce

- Staffing issues (losing a kitchen hand) that makes self-sourcing trips impossible
- A push to improve sustainability/provenance story without extra admin

Willingness to pay (price sensitivity)

- **Sensitivity:** Medium (they'll pay for reliability and time savings, but they feel every monthly cost)
- **Likely preference:** Per-delivery + service fee at first, then consider subscription if it truly reduces headaches
- **Expected acceptable range:**
  - Delivery fee: **CHF 8–12** per drop
  - Service fee: **5–8%** if invoicing is consolidated and quality is consistent
  - Monthly plan: **CHF 250–320** if it includes priority slots and "no drama" replacements
- **What increases WTP:** Guaranteed delivery window, very easy reordering, consistent grading, and fewer invoices than today

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4) Persona 2 — The Purchasing-Led Mid-Sized Restaurant Operator

Snapshot

- **Who:** 1–3 location group or a single larger restaurant with a dedicated purchasing manager (or operations manager) controlling supplier spend.
- **Why they fit you:** They value predictable deliveries, clean invoicing, and supplier performance metrics. They currently rely on a **wholesale distributor** plus emergency runs to **Aligro**.

Demographics

- **Age:** 28–45
- **Income:** CHF 80k–130k (role-dependent)
- **Education:** Hospitality management, business training, or procurement/logistics background
- **Location:** Zürich city and commuting belt (hard requirement: next-morning routes must be reliable)
- **Job title:** Purchasing Manager, Operations Manager, F&B Manager

Psychographics

- **Values:** Control, reliability, auditability, fewer surprises
- **Beliefs:** "If you can't measure it, it will drift." Wants KPIs: on-time rate, substitutions, complaint rate
- **Lifestyle:** Office hours mixed with service checks; email-heavy; more structured than chefs
- **Personality traits:** Pragmatic, process-driven, negotiator mindset

Pain points (top 5 daily frustrations)

1. **Invoice chaos** across multiple small suppliers (time sink and accounting errors)
2. **Delivery window uncertainty** that disrupts kitchen prep schedules
3. **Supplier communication gaps** (no clear substitutions policy, unclear stock updates)
4. **Quality complaints** from chefs that are hard to resolve fast
5. **Budget drift** (emergency buys at Aligro; inconsistent pricing)

Goals & aspirations

- **Standardize purchasing** without killing menu creativity

- Reduce supplier count while keeping **quality acceptable**
- Consolidate admin: **one invoice**, predictable schedules, simple reconciliation
- Improve supplier governance so chefs complain less and operations runs smoother

Buying behavior

- **Discover:** LinkedIn, vendor outreach, referrals from other operators, hotel/restaurant networks, trade fairs
- **Evaluate:** Wants a pilot with clear rules: cut-off times, substitutions, service levels, escalation path
- **Purchase pattern:** Larger, planned orders; prefers standing lists and templates; formalizes preferred suppliers
- **Decision drivers:** Reliability + invoicing + predictable pricing > novelty
- **Competitor "default" today:** A local wholesale distributor for routine supply; **Farmy.ch** may be considered for convenience but often lacks purchasing controls and restaurant-specific workflows; Aligro as fallback

Media consumption

- **Online:** LinkedIn, email newsletters, vendor PDFs, Google searches for "local supplier Zürich"
- **Offline:** Industry events, supplier presentations, tastings, operator meetups

Objections

1. **"This will add complexity to procurement."** Another vendor = another process
2. **"Fees are hard to justify internally."** Commission feels like "extra margin loss" unless offset by savings
3. **"Can farms meet consistent specs?"** They fear variability and chef complaints

Trigger events

- Accounting pushes back on too many invoices
- Expansion to a second location (supply needs standardization)
- A quality incident with a distributor that creates internal pressure
- A sustainability reporting requirement (local sourcing targets)

Willingness to pay (price sensitivity)

- **Sensitivity:** Medium-low if you prove admin savings and reliability
- **Expected acceptable range:**
  - Delivery fee: **CHF 10–15** (they value predictable windows)
  - Service fee: **6–10%** if it replaces hidden costs (staff time, waste, emergency runs)
  - Monthly plan: **CHF 300–400** if it includes priority delivery, consolidated invoicing, and service guarantees
- **What increases WTP:** SLA-like reliability, reporting (on-time %, substitutions), and predictable monthly billing

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5) Persona 3 — The High-Volume Kitchen Manager With Strict Routines

Snapshot

- **Who:** Kitchen manager or head chef for a high-throughput restaurant (busy brasserie, casual chain unit, canteen-style) in Zürich.
- **Why they fit you:** They need dependable next-morning deliveries to keep prep lines moving. But they are **price-and consistency-focused** and less interested in farm storytelling.

Demographics

- **Age:** 30–55
- **Income:** CHF 85k–140k
- **Education:** Culinary apprenticeship; some operations training
- **Location:** Zürich city and surrounding canton; delivery timing is critical due to early prep
- **Job title:** Kitchen Manager, Head Chef, Production Chef

Psychographics

- **Values:** Predictability, speed, low error rates, cost control
- **Beliefs:** "A system beats heroics." Wants repeatable supply and standardized produce sizes/grades
- **Lifestyle:** Early starts, strict prep timelines, less time for browsing options
- **Personality traits:** Practical, detail-oriented, impatient with unclear processes

Pain points (top 5 daily frustrations)

1. **Late deliveries** that delay prep and impact service quality
2. **Inconsistent produce sizes/quality** causing portion control issues
3. **Stockouts** that force last-minute substitutions and menu changes
4. **Receiving and storage problems** (cold chain, crates, labeling)
5. **Emergency purchases** (Aligro runs) that burn labor time and money

Goals & aspirations

- Lock in a **reliable next-morning routine**
- Reduce waste through better forecasting and consistent grading
- Keep food cost stable and avoid "fire drill" mornings
- Improve team morale by removing daily supply stress

Buying behavior

- **Discover:** Through suppliers already serving their category, referrals from other kitchen managers, sometimes procurement mandates
- **Evaluate:** Very operational: delivery punctuality, packaging, crate system, substitution policy, speed of issue resolution
- **Purchase pattern:** Regular high-volume SKUs; wants favorites list and fast reorder; less browsing
- **Decision drivers:** Reliability + consistency + price > variety
- **Competitor "default" today:** Wholesale distributor and cash-and-carry (**Aligro**) for breadth and emergency backup

Media consumption

- **Online:** WhatsApp, quick supplier updates, sometimes Facebook groups, limited time for content
- **Offline:** Supplier reps, practical trade demos, equipment and logistics-focused events

Objections

1. **"Your produce won't be consistent enough."** Variability kills portion control
2. **"Your selection won't cover my core SKUs."** They need staples always available
3. **"Fees will make me uncompetitive."** They are sensitive to cost per portion

Trigger events

- Repeated late/incorrect deliveries from current supplier
- New location opening with tight staffing and no time for market trips
- Management pressure to reduce waste and emergency buys
- A new menu cycle needing reliable produce volumes

Willingness to pay (price sensitivity)

- **Sensitivity:** High (but will pay for reliability if it prevents labor waste)
- **Expected acceptable range:**
  - Delivery fee: **CHF 8–10**
  - Service fee: **5–7%** if pricing is stable and substitution rules are strict
  - Monthly plan: **CHF 200–280** if it guarantees early delivery slots and consistent grading
- **What increases WTP:** Tight delivery windows, quality specs, and operational tools (favorites, standing orders)

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6) Persona 4 — The Fine-Dining, Provenance-First Chef

Snapshot

- **Who:** Executive chef or chef de cuisine in Zürich fine dining (or high-end seasonal concept) where produce quality and provenance are part of the guest experience.
- **Why they fit you:** They'll pay for top-tier produce and are motivated by Swiss farm verification and seasonal planning. They will also be the most demanding.

Demographics

- **Age:** 29–44
- **Income:** CHF 95k–170k (role and restaurant profile dependent)
- **Education:** Culinary apprenticeship + international experience; sometimes hospitality school
- **Location:** Zürich city primarily; may source from specific farms within the 30–40 km routing area
- **Job title:** Executive Chef, Chef de Cuisine

Psychographics

- **Values:** Excellence, authenticity, craft, relationships with growers
- **Beliefs:** Ingredient quality is a competitive advantage; story and seasonality matter
- **Lifestyle:** Service-heavy, creativity-focused; time-poor but deeply invested in sourcing
- **Personality traits:** High standards, curious, sometimes perfectionist, relationship-driven

Pain points (top 5 daily frustrations)

1. **Chasing specific varieties** and getting vague substitutes
2. **Unreliable availability updates** that break menu planning
3. **Quality that looks fine on paper but fails on the plate**
4. **Too much back-and-forth** with multiple farms for small quantities
5. **Lack of transparency** (where exactly is it from, when harvested, handled how)

Goals & aspirations

- Build a reputation for **seasonal Swiss produce excellence**
- Reduce sourcing admin while improving ingredient story
- Get predictable access to "best of season" without constant calls
- Offer menus that feel curated, not constrained

Buying behavior

- **Discover:** Chef network, farm relationships, Instagram, tastings, word-of-mouth, coverage in local food media
- **Evaluate:** Wants proof: farm verification, harvesting practices, photos, varietal details, consistent handling and cold chain
- **Purchase pattern:** Smaller quantities but high selectivity; frequent adjustments; wants pre-order visibility for peak items
- **Decision drivers:** Quality + provenance + reliability > price
- **Competitor "default" today:** Direct farm relationships, specialty suppliers, and distributor top-tier lines; may use **Farmy.ch** personally but often finds it not designed for professional menu planning and service timing

Media consumption

- **Online:** Instagram, chef forums, restaurant media, YouTube technique content
- **Offline:** Tastings, farm visits, chef collaborations, premium supplier demos

Objections

1. **"Your quality bar won't match my standards."** They fear average produce sold as premium
2. **"I need specific varietals, not generic categories."** "Carrots" is not enough
3. **"I don't want the same produce everyone gets."** They want uniqueness and priority access

Trigger events

- Seasonal menu change and need for consistent access to key produce
- A farm relationship becomes unreliable (weather, staffing, logistics)
- A big review/press moment where quality must be flawless
- A new sustainability narrative (local, verified, transparent)

Willingness to pay (price sensitivity)

- **Sensitivity:** Low-medium (they'll pay, but only if quality is truly superior)
- **Expected acceptable range:**
  - Delivery fee: **CHF 12–15**
  - Service fee: **7–10%** if verification, handling, and availability planning are strong
  - Monthly plan: **CHF 320–450** if it includes priority allocation and early access to seasonal lists
- **What increases WTP:** Verified farm data, varietal-level listings, tight cold chain, and "first pick" allocations

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7) Persona comparison (what's different at a glance)

To keep the differences practical, here are five traits that predict adoption speed in Zürich:

- **Tech readiness:** Will they actually use an app smoothly?

- **Price sensitivity:** Will fees block the sale?
- **Urgency for next-morning:** How painful is a late delivery?
- **Loyalty to current suppliers:** How hard is it to replace today's distributor/Aligro routine?
- **Digital engagement:** Will they respond to digital marketing and seasonal alerts?
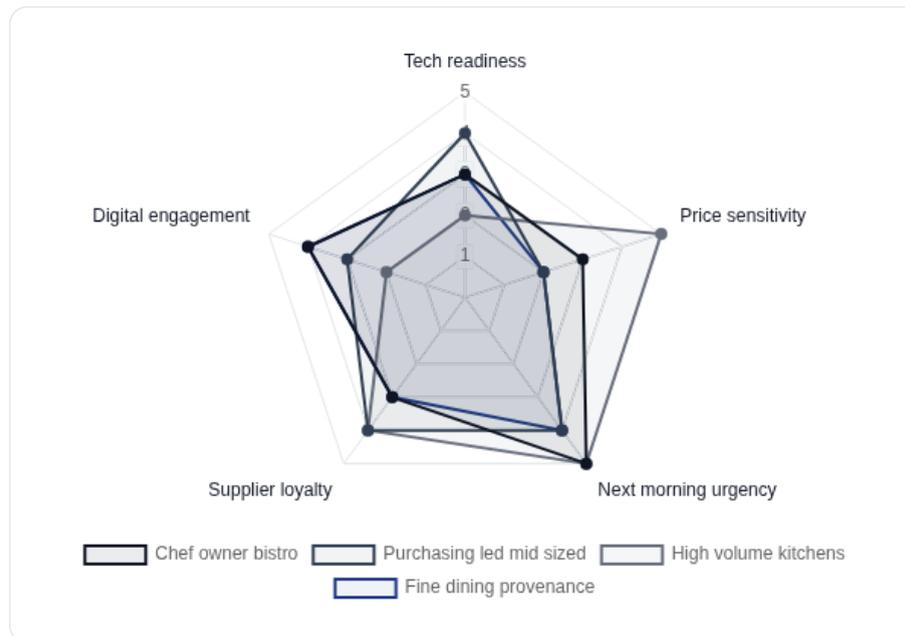
Figure 2: Radar comparison of the 4 personas across adoption-relevant traits for a Zürich-first next-morning farm supply service.

8) Willingness to pay by segment (and what drives it)

The key truth about pricing in Zürich restaurant supply

Restaurants rarely evaluate a delivery fee or commission "in isolation." They compare you to the *total cost of their current routine*, including:

- **Labor time** (calls, chasing invoices, Aligro runs)
- **Risk cost** (missed prep, menu compromises, guest experience damage)
- **Waste cost** (inconsistent quality → trimming and spoilage)
- **Admin cost** (many invoices, reconciliation errors)

This is why two segments can accept the same headline fee for very different reasons:

- The **high-volume kitchen** pays if it prevents costly disruptions.
- The **fine-dining chef** pays if it protects quality and reputation.

Practical WTP guidance per segment (Zürich launch)

Use these as pricing test ranges during your 4–6 week validation:

- **Chef owner bistro:**
  Wants affordability but values time saved

  - Delivery fee: CHF 8–12
  - Service fee: 5–8%

- Monthly plan: CHF 250–320
- **Purchasing led mid sized:**
  Will pay for clean invoicing and predictable operations

  - Delivery fee: CHF 10–15

  - Service fee: 6–10%

  - Monthly plan: CHF 300–400

- **High volume kitchens:**
  Price sensitive, but will pay for punctuality and consistency

  - Delivery fee: CHF 8–10

  - Service fee: 5–7%

  - Monthly plan: CHF 200–280

- **Fine dining provenance:**
  Pays for quality, verification, and priority allocation

  - Delivery fee: CHF 12–15

  - Service fee: 7–10%

  - Monthly plan: CHF 320–450

What to bundle so the monthly plan feels "worth it"

To make CHF 299-ish feel rational versus "just fees," the plan should clearly include things competitors don't give them:

- **Guaranteed delivery slot** (the real product, not the app)

- **Faster issue resolution** and clear substitution rules

- **Seasonal availability planning** (what's coming next week)

- **Consolidated invoicing** (especially versus multi-farm buying)

This helps you win against:

- **Aligro** (breadth and immediacy, but costs labor time and is not next-morning delivered to the kitchen)

- **Local distributors** (stable operations, but weaker farm-level story/seasonal planning)

- **Farmy.ch** (online convenience, but not built around restaurant workflows and predictable next-morning service for prep)
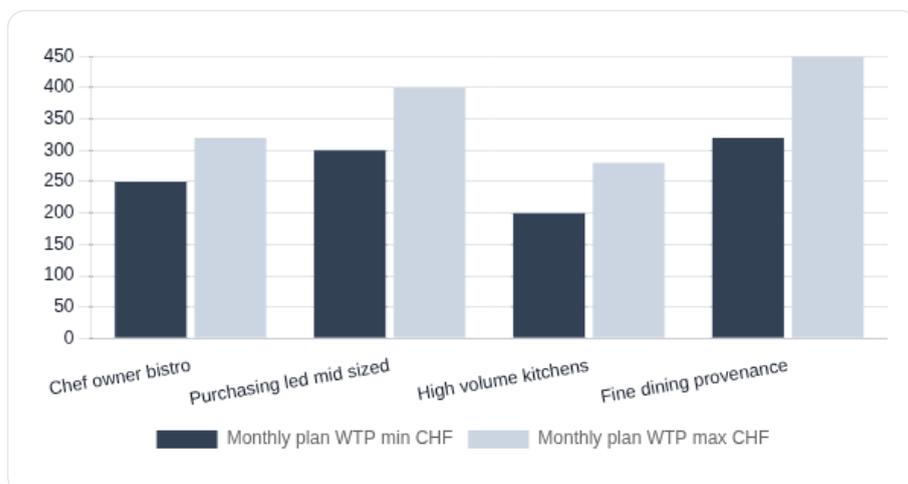
9) Segment prioritization matrix (who to target first in Zürich)

To prioritize, you need two simple axes:

- **Value to you:** frequency, retention potential, and willingness to pay
- **Ease to win:** how fast they decide, how risky switching feels, and how much process change is required

Prioritization table (Zürich-first)

SEGMENT	VALUE TO YOU	EASE TO WIN	WHY IT LANDS HERE (ZÜRICH REALITY)	RECOMMENDED PRIORITY
Chef owner bistro	High	High	Fast decision-maker; strong pain on time + reliability; seasonal story resonates; switching part of spend is easy	1
Fine dining provenance	Medium-high	Medium	Will pay and can become a flagship reference, but quality bar is strict and expectations are high	2
Purchasing led mid sized	High	Medium-low	Great for volume + stable retention once integrated, but requires procurement buy-in and proof of admin benefits	3
High volume kitchens	Medium	Low	Very sensitive to consistency and price; switching risk feels high; needs tight ops and specs before they trust it	4

What "priority" means operationally for your pilot

- **Start with Chef-owner bistros (Priority 1):**
  Best mix of fast learning, frequent orders, and willingness to forgive early imperfections if you fix them quickly.
- **Add 1–2 Fine-dining accounts early (Priority 2):**
  Not for volume, but for quality discipline and credibility. They force you to get verification, handling, and seasonal planning right.
- **Approach Purchasing-led groups once your ops are stable (Priority 3):**
  Come with evidence: on-time rate, invoice consolidation, clear substitution rules, and predictable delivery windows.
- **Delay the strict high-volume segment until consistency is proven (Priority 4):**
  They are the most likely to churn if one week goes wrong. Win them later with specs, standing orders, and a track record.

Note on Lausanne and Geneva expansion (same segments, different emphasis)

When you expand to **Lausanne and Geneva**, the same four segments exist, but prioritization often shifts slightly:

- Purchasing-led operations may become relatively more important sooner (more structured procurement in some groups).
- Fine-dining/provenance can be a strong wedge if you can secure distinctive farm supply and reliable next-morning routing in each city's geography.
- High-volume remains the "prove it with ops" segment everywhere: they follow reliability, not marketing.

Industry Trend Analysis

1) Trend intelligence brief — what is changing, how fast, and why it matters (Zürich first)

This business sits at the intersection of **fresh produce**, **B2B ordering**, and **next-morning cold-chain delivery**. In Zürich (and later Lausanne/Geneva), that intersection is being reshaped by: cost pressure in hospitality, climate-driven supply swings, rising expectations for reliability, and faster "business shopping online" behavior.

Below are the **12 most important trends** for a farm-to-restaurant ordering and delivery layer in **Zürich + 30–40 km**, with **impact ratings (1–10)** and time horizons.

2) Trend scorecard (impact ratings + horizon + "so what")

The 12 trends (5 macro forces + 7 micro patterns)

ID	TREND (PLAIN LANGUAGE)	TYPE	HORIZON	IMPACT (1–10)	"SO WHAT" FOR THIS BUSINESS IN ZÜRICH
M1	Restaurants stay cost-sensitive and demand predictable pricing	Macro	Short–Mid	9	Win by reducing waste and surprises: stable delivery slots, clear substitutions, transparent fees
M2	Climate volatility increases supply swings for local produce	Macro	Mid–Long	9	Make "availability truth" your product: live stock, smart substitutes, farmer pooling, menu planning help
M3	Sustainability proof moves from nice-to-have to required	Macro	Mid	8	Build easy proof: origin, farm verification, packaging returns, simple footprint proxies per delivery
M4	Tight labor market pushes automation and partner models	Macro	Short–Mid	7	Ops must be lightweight: courier partners, tight picking windows, fewer manual touches, fewer invoices
M5	B2B buying goes more digital and more integrated	Macro	Short	8	Ordering must be faster than WhatsApp/email; integrations and reorders become key retention drivers
m1	Chefs shift to smaller, more frequent orders to cut waste	Micro	Short	8	Next-morning reliability becomes non-negotiable; subscription plan fits daily ordering
m2	Reliability becomes a differentiator: narrow time windows, proactive updates	Micro	Short	8	Compete head-on with wholesalers and Farmy.ch on predictability, not only "local story"
m3	Demand rises for restaurant-ready formats and consistent specs	Micro	Short–Mid	7	Packaging/quality standards become a moat; onboarding farms into consistent grades matters
m4	Consolidated invoicing is increasingly valued	Micro	Short	7	Your invoicing layer can beat farm shops and markets; reduce admin for chefs/purchasing
m5	More hybrid sourcing: chefs mix local farms with wholesalers	Micro	Short	6	Position as "fresh local layer" that plugs into weekly routines; don't force exclusivity
m6	Reusable crates and return logistics become common	Micro	Mid	7	Add crate deposits/returns; optimize routes around returns to protect margins
m7	Market is consolidating: distributors and online grocers expand service scope	Micro	Mid	6	Expect reactions from local wholesale distributors and Farmy.ch; differentiation must be workflow-deep

3) Macro trends — 5 global forces shaping the industry (localized to Zürich rollout)

M1) Restaurants stay cost-sensitive and demand predictable pricing (Impact 9/10)

What's happening: Food and labor costs have been elevated for years, and restaurants are acting like every franc matters. In practice, that means more scrutiny on: delivered price, wastage, minimum order sizes, and "hidden" fees.

Why it matters in Zürich: Independent bistros and mid-sized restaurants often run tight margins. They will pay for convenience *only if it reduces total cost* (less waste, less staff time, fewer emergency runs to cash-and-carry like **Aligro**).

So what for you:

- Make the "value math" obvious: **waste avoided + time saved + fewer gaps in service**.
- Offer price tools that feel fair: **stable price bands**, "best price today" flags, and **clear substitution rules**.
- The CHF 250–400/month plan will land better if it bundles **predictability** (priority slot, fewer stockouts, simpler returns), not just "faster delivery."

M2) Climate volatility increases supply swings for local produce (Impact 9/10)

What's happening: Weather volatility makes local supply less steady—volumes and quality can swing week to week.

Why it matters in Zürich: Your promise is "next-morning, restaurant-ready, local." Climate volatility directly threatens that promise unless you build systems for it.

So what for you:

- Build **availability credibility**: real-time stock, earlier cut-off times, and honest lead times.
- Make "substitutions" a premium feature: chef-controlled rules like "replace romaine with frisée" or "no substitutes."
- Use **multi-farm pooling** so one farm's shortfall doesn't break your delivery route.

M3) Sustainability proof moves from nice-to-have to required (Impact 8/10)

What's happening: Restaurants increasingly need to show sustainability to customers, corporate clients, venues, and sometimes landlords or event organizers. Even when laws don't directly force small restaurants, requirements travel through supply chains.

Why it matters in Zürich: Zürich diners skew sustainability-aware, and many restaurants position themselves on local/seasonal. Proof reduces skepticism and supports pricing.

So what for you:

- Treat traceability as a product: farm verification, origin, harvest date when possible, packaging return rate.
- Turn sustainability into less work for chefs: one-click "supplier proof" PDFs for audits or marketing.
- Reusable cold-chain crates can become a visible sustainability feature if returns are painless.

M4) Tight labor market pushes automation and partner models (Impact 7/10)

What's happening: Staffing remains hard in both hospitality and logistics. Businesses respond by simplifying workflows, outsourcing non-core tasks, and expecting tools to "just work."

Why it matters in Zürich: The hardest thing to scale here isn't the app—it's daily operations: picking accuracy, cold chain, and delivery punctuality.

So what for you:

- Design ops around **few human handoffs**: standardized farm packing, scan-based receiving, and predictable courier pickup windows.
- Courier partners (2–3) reduce risk, but only if you standardize packaging and handover rules.
- Your part-time ops coordinator must be supported by strong tooling: exception alerts, not manual chasing.

M5) B2B buying goes more digital and more integrated (Impact 8/10)

What's happening: Chefs and purchasing managers increasingly expect the same speed as consumer shopping, but with B2B needs: reorders, invoices, approvals, delivery slots, and substitutions.

Why it matters in Zürich: Competitors like **Farmy.ch** (online grocery) help normalize ordering online. Meanwhile, local wholesale distributors improve their digital ordering.

So what for you:

- Win on **workflow fit**, not just product catalog: reorders, standing daily baskets, invoice export, and clear delivery promises.
- Integration (even simple): export to accounting, clean invoice formats, and order history that supports menu planning.

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4) Micro trends — 7 emerging patterns from the last 12 months (industry behavior you can feel on the ground)

m1) Smaller, more frequent orders to cut waste (Impact 8/10)

What's happening: Restaurants are trying to lower spoilage and free up cash by ordering closer to need.

Zürich implication: Next-morning delivery becomes a core operating rhythm, not an occasional service.

So what for you:

- Your subscription plan becomes a "daily ordering system," not a discount.
- Tight execution matters more than adding many SKUs.

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m2) Reliability and communication are becoming the main differentiators (Impact 8/10)

What's happening: Buyers increasingly judge suppliers by: on-time window, accuracy, and how issues are handled.

Competitive angle: Wholesalers have strong logistics; markets have freshness but are time-heavy; farm shops can be inconsistent. **Farmy.ch** can be convenient but is not always "restaurant-first."

So what for you:

- Build trust tools: live delivery tracking, proactive delay alerts, and "confirmed by" timestamps.

- Make delivery slot reliability a headline promise for Zürich (and price for it).

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m3) More demand for restaurant-ready formats and consistent specs (Impact 7/10)

What's happening: Kitchens want predictable sizes, grades, and packing that reduces prep and sorting.

So what for you:

- Your farm onboarding fee becomes easier to justify if it funds: packing standards, labeling, and consistency checks.
- Create "chef specs" per item: size range, ripeness, pack weight tolerance.

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m4) Consolidated invoicing is increasingly valued (Impact 7/10)

What's happening: Admin time is a hidden cost. Multiple farms means multiple invoices unless someone consolidates.

So what for you:

- Consolidated invoicing is a strong wedge against weekly markets and direct farm ordering.
- Offer invoice grouping by week, cost center tags, and simple exports.

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m5) Hybrid sourcing becomes normal (Impact 6/10)

What's happening: Many kitchens blend: wholesalers for staples, local farms for seasonal highlights, and cash-and-carry (**Aligro**) for emergency fills.

So what for you:

- Don't fight the pattern—fit into it. Position as "best local layer" with dependable morning delivery.
- Expand thoughtfully: add only the items that reduce emergency trips and protect menu quality.

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m6) Reusable packaging and return logistics are becoming common (Impact 7/10)

What's happening: Reusable crates and insulated boxes reduce waste and protect quality, but they require return discipline.

So what for you:

- Add crate deposits, return reminders, and pickup-with-next-delivery loops.
- Route planning must treat returns as first-class cargo, not an afterthought.

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m7) Consolidation pressure: incumbents broaden service (Impact 6/10)

What's happening: In tight markets, scale players try to lock in customers by bundling: ordering + delivery + credit terms + product breadth.

So what for you:

- Expect responses from local wholesale distributors (better ordering UX, special pricing) and **Farmy.ch** (B2B offers).

- Your defensibility must be: chef workflow features, verified farms, and truly predictable slots in Zürich.

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5) Technology disruptions — what changes the game, and when it likely hits mainstream in Switzerland

Disruption A) Smarter ordering: "standing baskets" + AI-assisted suggestions (Mainstream: 0–1 year)

What it is: Reorder templates, par-level lists, and suggestions based on past orders and seasonality.

Why it matters: It reduces chef time—the real pain point.

What to do: Make reordering and substitutions faster than texting a supplier.

Disruption B) Real cold-chain proof: low-cost temperature logging + exception alerts (Mainstream: 1–3 years)

What it is: Affordable sensors and QR scans that prove temperature stayed in range.

Why it matters: Trust and quality disputes are expensive. Proof reduces friction.

What to do: Start simple: sealed crate IDs, scan timestamps, and "temperature checked" steps for sensitive items.

Disruption C) Route optimization that treats time windows as sacred (Mainstream: 0–1 year)

What it is: Better routing tools that optimize for: narrow windows, returns, multi-stop farms, and city traffic.

Why it matters in Zürich: City delivery penalties are often reputational, not contractual. Late deliveries ruin mise en place.

What to do: Use routing as a competitive advantage: fewer promises, kept reliably.

Disruption D) Reusable "smart crates" and deposit automation (Mainstream: 1–3 years)

What it is: Trackable crates with deposits, automated reconciliation, and return compliance.

Why it matters: Reusables protect quality and cut packaging cost, but only if returns work.

What to do: Build deposit and return logic early, even with simple QR labels.

Disruption E) Lightweight integrations: accounting exports and invoice automation (Mainstream: 0–1 year)

What it is: Clean invoice data exports, standardized invoice formats, and automatic matching.

Why it matters: Your invoicing layer is a major differentiator versus direct farm buying.

What to do: Prioritize "finance happiness" features as much as chef UX.

Disruption F) Quality grading support at the source (Mainstream: 3–5 years)

What it is: Tools that help farms grade produce consistently (simple photo checks, standardized grading guides).

Why it matters: Consistency is what turns "local farms" into "reliable supply."

What to do: Start with human standards and training; tech can follow later.

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6) Regulatory shifts — upcoming rules and policies to watch (Switzerland first, EU spillover second)

Regulation in this space usually hits through **packaging**, **transport**, **food safety/traceability**, and **labor models**. Even when rules are not aimed at small restaurants, suppliers often adopt them, and expectations flow downstream.

Shift 1) Packaging and waste tightening (Watch window: 1–3 years)

What to watch: Stronger pressure toward recyclable/reusable packaging and clearer reporting of packaging waste (EU policy changes often influence Swiss packaging expectations via suppliers and customer standards).

So what for you:

- Reusable crates become not just cost-saving, but a compliance-friendly default.
- Build deposit/return workflows before you scale beyond Zürich.

Shift 2) Food safety and traceability expectations rise (Watch window: 1–3 years)

What to watch: More emphasis on "where did this come from," batch-level traceability for certain products, and tighter documentation for cold chain.

So what for you:

- Make "verified Swiss farm" real: documented onboarding, consistent labeling, and clear chain-of-custody steps.
- Treat traceability as a product feature for restaurants, not just internal admin.

Shift 3) Urban delivery constraints and emissions expectations (Watch window: 1–3 years)

What to watch: City-level measures that indirectly shape delivery: noise restrictions, curb access, idling rules, and increasing preference for low-emission vehicles for city logistics.

So what for you:

- Zürich routing and vehicle choice matter: e-cargo bikes for small drops, consolidated stops, and strict time windows.
- Build operational flexibility so you can adapt without breaking the promise.

Shift 4) Courier labor classification and working conditions (Watch window: 0–3 years)

What to watch: Ongoing scrutiny of gig-style delivery models across Europe, with potential knock-on expectations in Switzerland (even without a single "big law," enforcement and standards can tighten).

So what for you:

- Partnering with reputable courier firms reduces legal and reputational risk.

- Price delivery to reflect true labor costs; don't race to the bottom.

Shift 5) Data protection and customer data handling (Watch window: 0–1 year)

What to watch: Increasing attention to how customer ordering data is stored, shared, and used.

So what for you:

- Keep data use simple and transparent; avoid "creepy" personalization.
- Restaurants are sensitive about revealing suppliers and pricing—earn trust with clear controls.

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7) Consumer behavior changes — how buyer preferences are evolving (your "consumer" is the chef/purchasing manager)

Change A) "Time is the currency"

Chefs value anything that reduces back-and-forth: fast ordering, predictable substitutions, fewer calls, fewer invoices.

So what: Your winning message in Zürich is "less chaos every morning," not "marketplace."

Change B) Trust beats variety

A smaller catalog that is consistently available and reliably delivered often wins over a huge list that is unpredictable.

So what: In the pilot, prioritize reliability on the top seasonal items and staples that create emergency runs.

Change C) Sustainability is expected, but only if friction is low

Many restaurants want local/seasonal and better packaging—but not if it adds admin.

So what: Bake sustainability into defaults (reusable crates, farm verification) and make reporting one click.

Change D) More openness to subscriptions if they feel like insurance

If a monthly plan buys peace of mind—priority slot, guaranteed morning windows, fewer stockouts—buyers accept it.

So what: Position CHF 299/month as "priority morning slot + reliability package," not "membership."

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8) Investment signals — where smart money is flowing (and what that implies for Zürich)

What investors have favored recently (directionally)

1. **B2B workflow software** (ordering, invoicing, forecasting): sticky and scalable if it becomes the daily habit.

2. **Asset-light marketplaces** with strong unit economics: fewer owned warehouses, more partner delivery.

3. **Cold-chain and packaging systems** that lower spoilage and disputes.

4. **Traceability and compliance tooling**: increasingly demanded by larger buyers and food service groups.

5. **Consolidation plays**: incumbents buying software or smaller platforms to defend accounts.

What this suggests for your business

- A "software + tight ops" model is more investable than a heavy owned-logistics model.

- Consolidated invoicing and chef workflow are the most defensible pieces versus incumbents.

- Expect M&A interest to come from: local wholesale distributors, logistics firms, and online grocers like **Farmy.ch** if you prove retention in Zürich.
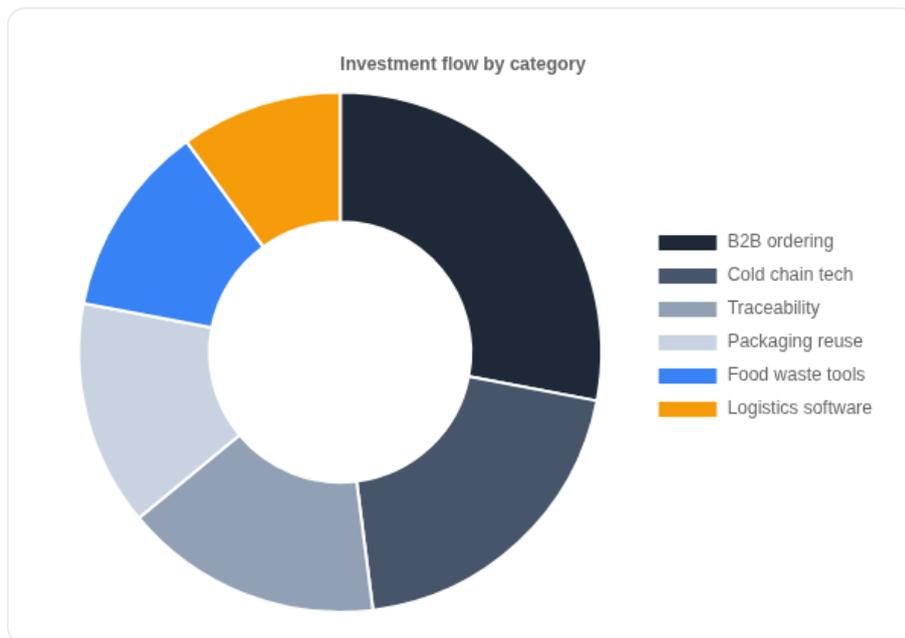
Figure 1: Directional split of where investment attention concentrates across categories relevant to farm-to-restaurant ordering and delivery.

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9) Timeline — mapping each trend to short, mid, and long term (and what you should do first)

Short term (0–1 year): impacts the Zürich validation + pilot immediately

- **M1 cost sensitivity**

- **M5 B2B goes digital**

- **m1 smaller, frequent orders**

- **m2 reliability as differentiator**

- **m4 consolidated invoicing value**

- **Shift 5 data handling expectations**

- **Disruptions A, C, E** become table stakes

What to do in the next 4–12 weeks (Zürich):

- Prove morning reliability with 10–15 restaurants: tight cutoffs, clear substitutions, proactive comms.

- Make invoicing and reorders unbelievably easy.
- Keep the farm set small but dependable; consistency beats breadth.

Mid term (1–3 years): determines whether you can expand to Lausanne and Geneva without breaking

- **M3 sustainability proof**
- **M4 labor constraints**
- **m3 restaurant-ready specs**
- **m6 reusable crates**
- **m7 consolidation pressure**
- **Shift 1 packaging tightening**
- **Shift 2 traceability expectations**
- **Shift 3 urban delivery constraints**
- **Shift 4 courier labor scrutiny**
- **Disruptions B, D** become differentiators

What to do after Zürich pilot proves demand:

- Standardize farm onboarding, specs, and packaging so the model travels city to city.
- Design crate returns and deposits before route complexity grows.
- Build operations dashboards so one coordinator can manage exceptions, not daily firefighting.

Long term (3–5 years): shapes category winners

- **M2 climate volatility** becomes more pronounced
- **Quality grading support at source** becomes more feasible and expected (Disruption F)

What to build toward:

- A resilient supply network: multiple farms per item, seasonal planning, and substitution intelligence.
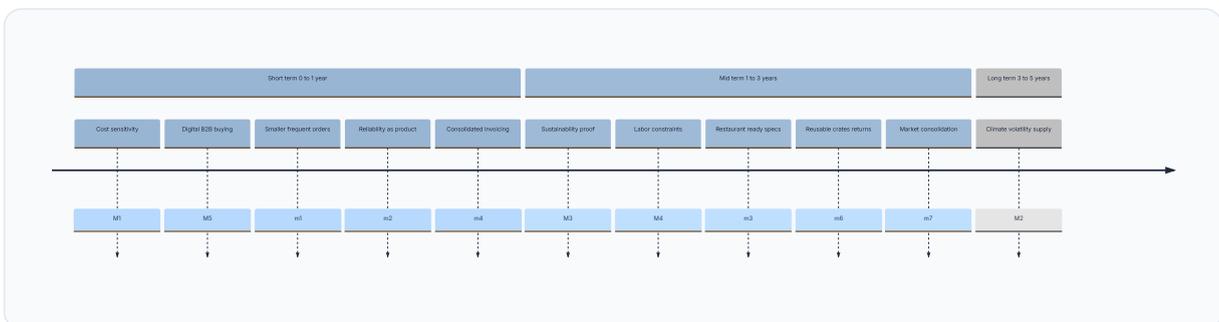- Evidence and trust: consistent specs, traceability, and measurable service reliability.

Figure 2: Trend horizon mapping showing which forces hit immediately in Zürich versus later as the model scales to Lausanne and Geneva.

10) Impact ratings — what matters most (and why)

In Zürich, the highest-impact trends are the ones that directly affect **daily kitchen operations**: price predictability, availability truth, and delivery reliability. Trends like sustainability and packaging matter, but they become decisive when they are turned into **easy defaults** that save time.
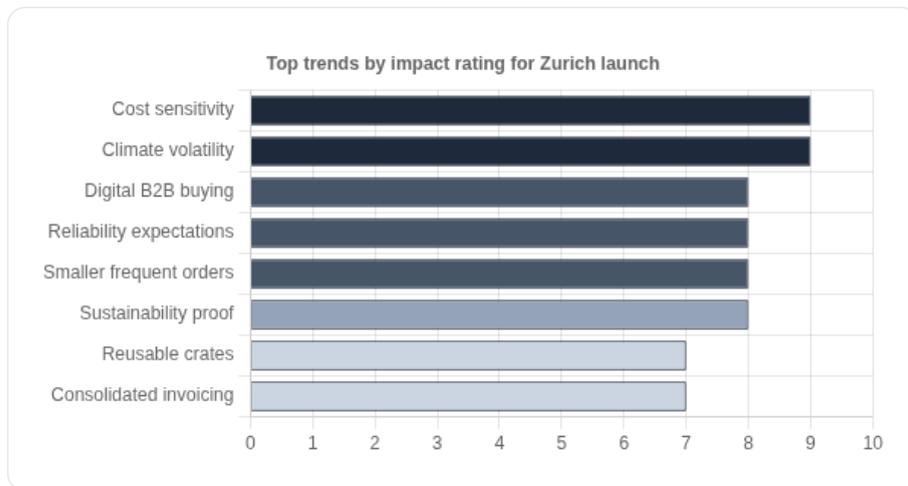
Figure 3: Highest-impact trends ranked for the Zürich launch, highlighting where execution and product focus will matter most.

11) "So what" — practical guidance to exploit each trend (Zürich launch playbook)

If M1 (cost sensitivity) is true, then:

- Lead with "total cost saved" stories: fewer emergency **Aligro** trips, less waste, fewer admin hours.
- Offer predictable delivery fees and transparent service percentage; avoid surprise add-ons.

If M2 (climate volatility) is true, then:

- Build substitution rules and seasonal planning into the app from day one.
- Maintain multiple farms per critical item before expanding to Lausanne/Geneva.

If M3 (sustainability proof) is true, then:

- Default to reusable crates and track returns.
- Provide simple "origin and farm verification" outputs restaurants can reuse for menus and procurement policies.

If M4 (labor constraints) is true, then:

- Design for low-touch ops: standard packaging, scan events, automated exception alerts.
- Use courier partners with clear SLAs and training for cold-chain handling.

If M5 (digital B2B buying) is true, then:

- Make ordering faster than messaging a supplier: reorders, favorites, standing daily baskets.
- Make invoicing painless: consolidated invoice, clean exports, easy reconciliation.

If m1 (smaller, frequent orders) is true, then:

- Optimize for daily rhythm: early cutoff, morning delivery, high fill rate on core items.
- Your monthly plan becomes a reliability contract.

If m2 (reliability expectations) is true, then:

- Compete on predictable delivery slots and proactive communication vs wholesalers and **Farmy.ch**.
- Track and publish internal KPIs: on-time rate, fill rate, substitution acceptance rate.

If m3 (restaurant-ready specs) is true, then:

- Create a farm standard kit: labels, pack sizes, grading guides.
- Charge onboarding fees as "quality enablement," not listing fees.

If m4 (consolidated invoicing) is true, then:

- Make this a primary marketing message for Zürich: "one invoice, many farms."
- Add cost-center tags and weekly summaries for purchasing managers.

If m5 (hybrid sourcing) is true, then:

- Position as the "fresh seasonal layer" that complements wholesalers.
- Avoid trying to replace wholesalers; aim to own the high-value local produce share.

If m6 (reusable crates) is true, then:

- Build deposits and returns into the ordering flow.
- Use returns to improve unit economics: fewer disposables, fewer product damages.

If m7 (consolidation) is true, then:

- Assume incumbents respond with pricing or improved ordering UX.
- Defend with workflow depth: chef-first substitutions, menu planning, verified farms, and morning reliability that is measurably better.

SWOT & Porter's Five Forces

1) SWOT analysis (Zürich first, 30–40 km radius; later Lausanne + Geneva)

Strengths — 7 internal advantages (with evidence)

1. **Clear "next-morning + restaurant-ready" promise (Impact: 5/5)**
   You are not trying to be "groceries for everyone." The product is built around a very specific job: *busy chefs need reliable, early delivery of the right quantities, ready to use*.
   Evidence: Your differentiator explicitly focuses on next-morning delivery, restaurant-ready orders, predictable slots, and chef-friendly planning.

2. **Verified Swiss farms + curated supply improves trust (Impact: 4/5)**
   Restaurants care a lot about consistency, provenance, and avoiding surprises (quality swings, missing items).

"Verified farms" reduces risk for chefs and purchasing managers.
Evidence: "Verified Swiss farms" is part of the core value proposition.

3. **Consolidated invoicing reduces admin pain (Impact: 4/5)**
Chefs and small restaurant teams hate dealing with many small invoices and payment flows. One consolidated invoice is a real operational win.
Evidence: Consolidated invoicing is explicitly in the differentiator.

4. **Predictable delivery slots fit kitchen workflows (Impact: 4/5)**
Restaurants run on tight prep windows. Predictable delivery slots are often worth paying for because they reduce labor chaos (someone must receive, check, store).
Evidence: "Predictable delivery slots" is explicitly in the differentiator and in the paid "priority delivery" plan.

5. **Seasonal availability + menu planning creates "sticky" habit (Impact: 4/5)**
If the platform helps chefs plan menus around what is available locally right now, it becomes part of weekly planning—not just a transactional ordering tool. That increases retention.
Evidence: "Menu planning based on seasonal availability" is explicitly part of the differentiator.

6. **A focused launch geography makes operations learnable (Impact: 4/5)**
Starting in Zürich city + nearby canton (30–40 km) is a manageable radius for next-morning routes and farm pickups/drops. This is the right shape for proving cold-chain + timing.
Evidence: Your launch plan and expansion sequence are defined and operationally realistic: Zürich first, then Lausanne/Geneva after routes are proven.

7. **Two revenue levers that match the value delivered (Impact: 3/5)**
Commission aligns with order volume, and the CHF 299/month plan monetizes reliability (priority delivery) for restaurants that value guaranteed slots.
Evidence: Revenue model includes 6–10% commission plus CHF 299/month plan.

Weaknesses — 7 internal limitations (honest assessment)

1. **Cold-chain logistics are hard to execute perfectly (Impact: 5/5)**
Fresh produce with next-morning delivery means temperature control, handling standards, and "no excuses" reliability. A few failures can damage trust quickly.
Evidence: You already list cold-chain crates as a required resource—meaning the model depends on this operational complexity.

2. **Dependence on courier partners reduces control (Impact: 5/5)**
Using 2–3 courier partners is practical, but it means service quality depends on external teams (lateness, handling, missing crates).
Evidence: Courier partners are a stated requirement; no owned fleet is mentioned.

3. **Marketplace chicken-and-egg risk in Zürich (Impact: 4/5)**
Restaurants want breadth and reliability; farms want consistent demand and simple workflows. Early on, you may have "not enough of both."
Evidence: Your validation plan targets 10–15 restaurants and a pilot with 5 farms—good for learning, but still thin supply density for daily reliability.

4. **Thin operating team increases fragility (Impact: 4/5)**
A part-time ops coordinator plus a "simple app" can work in a pilot, but daily exceptions (substitutions, late items, refunds, complaints) add up fast.
Evidence: Resources list includes only 1 part-time ops coordinator and a simple app/dashboard.

5. **Margin pressure: fresh logistics + service expectations (Impact: 4/5)**
If restaurants expect "wholesale-ish pricing" but you're also delivering daily with cold-chain complexity, your 6–10% commission can get squeezed unless order sizes are healthy.

Evidence: Revenue model is commission-based and includes guaranteed-slot expectations; price willingness suggests restaurants are cost-aware.

6. **Quality standardization across farms takes work (Impact: 3/5)**
   "Restaurant-ready" implies consistent grading, packing, labeling, and substitutions rules. Getting small farms to do this consistently is operationally heavy.
   Evidence: You plan to charge farms an onboarding fee for packaging standards—because standards are needed and non-trivial.

7. **Seasonality and supply variability can cause stock-outs (Impact: 3/5)**
   Seasonal Swiss produce is a strength, but it also means availability changes quickly. Chefs hate last-minute changes unless substitution rules are rock-solid.
   Evidence: "Seasonal availability" is core; therefore variability is structurally part of the model.

Opportunities — 7 external factors you can exploit (Zürich-specific)

1. **Zürich has many independent restaurants that value local sourcing (Impact: 4/5)**
   Independent bistros and mid-sized restaurants often want "local + seasonal" as part of brand and menu identity. This supports a premium for freshness and provenance.
   Evidence: Your defined target customer is exactly this group in Zürich, Lausanne, Geneva.

2. **Time savings is a stronger hook than "local" for busy chefs (Impact: 5/5)**
   In Zürich, labor is expensive and schedules are tight. If you reliably cut ordering time, chasing invoices, and delivery chaos, you can win even when competitors are cheaper.
   Evidence: Your differentiator emphasizes consolidated invoicing, predictable slots, and restaurant-ready orders.

3. **Expansion to Lausanne + Geneva after proving routes (Impact: 4/5)**
   Once you've built the playbook in Zürich (packaging standards, courier SOPs, substitution rules), you can replicate it in the other two cities with similar customer profiles.
   Evidence: Expansion path is explicitly planned.

4. **Partner with culinary communities and local food networks (Impact: 3/5)**
   Zürich has strong food culture. Partnerships (chef groups, gastronomy schools, local producer networks) can accelerate trust and supply onboarding more than generic ads.
   Evidence: You've set aside ~CHF 20k pilot marketing—partnership-driven marketing can be more efficient than broad campaigns.

5. **Create a "seasonal specials" ordering rhythm (Impact: 4/5)**
   A weekly drop of "what's great this week within 30–40 km of Zürich" can become a habit and increase basket size (restaurants add items they weren't planning).
   Evidence: Menu planning + seasonal availability is already part of your design.

6. **Add "predictability products" beyond delivery (Impact: 3/5)**
   For example: standing orders for staples (salads, potatoes, onions) plus flexible seasonal add-ons. This makes demand more stable for farms and your routes more efficient.
   Evidence: Your business model includes a monthly plan—standing-order features naturally support subscription value.

7. **Build a quality/handling reputation that farm shops and general grocers don't optimize for (Impact: 4/5)**
   Many consumer-oriented services (or farm shops that also deliver) are not designed around chef workflows (weights, prep standards, receiving windows). You can own that niche.
   Evidence: Your positioning is "built specifically for busy chefs," unlike general online grocers.

Threats — 7 external factors that could harm the business (Zürich-specific)

1. **Local wholesale distributors can defend accounts aggressively (Impact: 5/5)**
   Incumbent distributors already have relationships, delivery routes, and credit terms. They can offer discounts, bundles, and "one truck solves everything."
   Evidence: Wholesale distributors are named direct competitors.

2. **Farmy.ch (and similar online grocers) can extend into B2B (Impact: 4/5)**
   A strong e-grocery brand may offer "business accounts," morning delivery windows, and curated local produce, leveraging existing infrastructure and marketing reach.
   Evidence: Farmy.ch is a named competitor.

3. **Farm shops with delivery can scale their delivery offers (Impact: 3/5)**
   Some farm shops may extend delivery to restaurants directly—especially if they already do home delivery in the Zürich area.
   Evidence: Farm shops with delivery are named direct competitors.

4. **Aligro and other cash-and-carry options anchor price expectations (Impact: 4/5)**
   Even if your quality is better, chefs can compare you to cash-and-carry pricing and availability. In cost pressure periods, they may revert to "pickup runs."
   Evidence: Aligro is explicitly named as an indirect competitor/substitute.

5. **Operational disruption risk: traffic, weather, peak-day volatility (Impact: 4/5)**
   Next-morning delivery in and around Zürich can be sensitive to route delays. A few late deliveries can cause churn because kitchens are unforgiving about timing.
   Evidence: Your core promise is next-morning reliability; therefore disruption is a direct threat.

6. **Food safety, traceability, and liability expectations (Impact: 4/5)**
   Restaurants will expect clear traceability, handling standards, and accountability if quality issues happen. Any incident can hurt brand trust.
   Evidence: Your "verified farms" and packaging standards imply you're taking responsibility for quality and process.

7. **Disintermediation: farms and restaurants go direct after you prove demand (Impact: 3/5)**
   If you successfully match farms and restaurants, some pairs may try to bypass the platform to avoid fees—especially if volumes become predictable.
   Evidence: Your model is an intermediary with commissions; bypass incentives are structural.

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2) SWOT cross-analysis (how to turn the SWOT into decisions)

SO strategies — match Strengths to Opportunities (what to do on purpose)

1. **Turn "next-morning reliability" into a paid habit (S1 + S4 + O2 + O6)**

- Build the CHF 299/month "priority delivery" plan around *guaranteed receiving windows*, fast issue resolution, and predictable substitutions rules.
- Position it as "less kitchen chaos," not "premium produce."

2. **Use consolidated invoicing + standards to win busy Zürich independents (S3 + S2 + O1 + O2)**

- Sell to the purchasing manager's pain: fewer vendors, fewer invoices, fewer calls.
- Make onboarding feel like a relief: one workflow, clear receipts, clean product labeling.

3. **Make seasonal menu planning the retention engine (S5 + O5)**

- Launch a simple weekly "seasonal availability list" for Zürich-area farms (what's plentiful, what's ending, chef-friendly notes).
- This creates a reason to open the app even when they "already know what they need."

4. **Prove the Zürich playbook, then replicate to Lausanne + Geneva (S6 + O3)**

- Treat Zürich as a controlled experiment: lock down packaging standards, delivery SLAs with couriers, customer support scripts, and farm substitution rules.
- Expansion becomes copying a system, not reinventing the business.

5. **Partnership-driven growth beats broad ads in a trust market (S2 + O4)**

- Trust is currency in food. Lean into chef communities and producer networks to get "social proof" faster than paid marketing alone.

6. **Differentiate hard against generalists (S1 + S5 + O7)**

- Make "restaurant-ready" concrete: consistent weights, crate labeling, chef notes, predictable substitutions.
- This is exactly where farm shops and consumer grocers often don't optimize.

7. **Use pricing flexibility to segment restaurants (S7 + O1)**

- Some restaurants will pay per delivery + service fee; others want a monthly plan for reliability.
- Use both to avoid forcing one pricing shape onto different restaurant types.

WT risks — the most dangerous Weakness + Threat combinations (what could break you)

1. **Courier dependency + next-morning promise (W2 + W1 + T5)**
   If a courier partner underperforms, you wear the blame. This can cause fast churn in Zürich because kitchens can't "wait it out."
   Risk control: strict courier SLAs, backup partner on every route, and proactive late-delivery alerts.

2. **Thin team + strong incumbent retaliation (W4 + T1 + T4)**
   Distributors can pressure restaurants with discounts and bundled offers, while your small ops team is already busy "keeping the trains running."
   Risk control: narrow ICP focus (restaurants that value reliability + local), and keep the offering simple during pilot.

3. **Supply variability + substitution alternatives (W7 + T3 + T7)**
   If items are often unavailable, restaurants will revert to stable sources (wholesalers) or go direct with a farm they trust.
   Risk control: multi-farm sourcing for key items, clear substitution rules, and "availability confidence" signals in the app.

4. **Marketplace thinness + competitive choice overload (W3 + T1 + T2)**
   In early days, limited farm selection can make the platform feel incomplete compared to wholesalers or Farmy.ch's broader catalog.
   Risk control: start with "must-have" items for Zürich chefs and guarantee them, rather than trying to offer everything.

5. **Margin pressure + price anchors (W5 + T4)**
   If customers compare you to Aligro pricing and expect daily delivery reliability, your economics can get tight quickly.
   Risk control: push larger baskets, standing orders, and paid reliability plans—don't rely only on small ad-hoc orders.

6. **Standardization burden + reputational risk (W6 + T6)**
   If packaging/quality standards are inconsistent across farms, restaurants blame the platform, not the farm.
   Risk control: onboarding checklist, spot checks, and a clear "quality guarantee" process.

7. **Low marketing budget + noisy market (W4 + T1 + T2)**
   CHF 20k pilot marketing must be used carefully; incumbents already have mindshare.
   Risk control: target 10–15 restaurants tightly, make them successful, then use testimonials/referrals to expand.
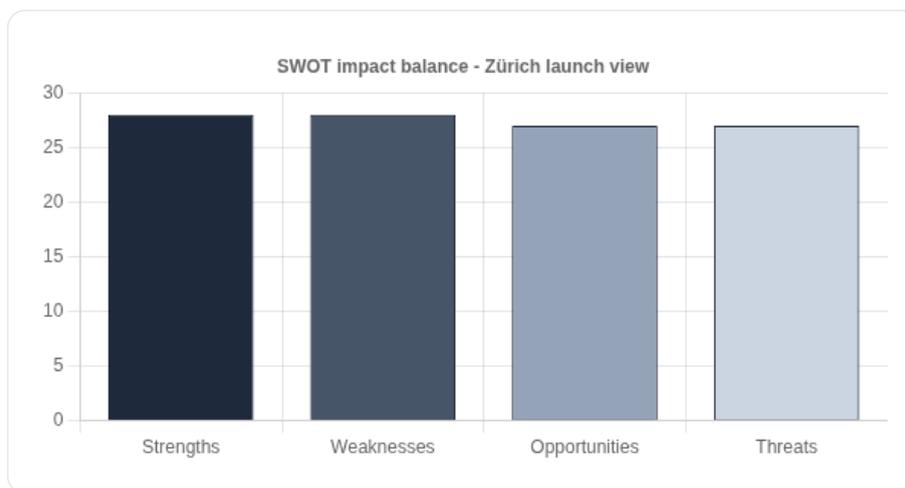

Figure 1: A simple weighted view of how much "impact" sits in each SWOT quadrant for the Zürich launch—showing that strengths and weaknesses are both meaningful, with opportunities and threats close behind.

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3) Porter's Five Forces (Zürich launch context)

How to read the scores (1–10):

- 1 = weak force (good for you; easier to earn healthy margins)
- 10 = strong force (bad for you; tougher to earn healthy margins)

3.1 Supplier power — 6/10 (moderately high)

Who the key suppliers are (in this business):

- **Farms** supplying produce (your core product)
- **Courier partners** providing delivery capacity and driver reliability
- **Cold-chain crates / packaging suppliers** (and cleaning/handling processes)
- **Software infrastructure** (app hosting, payment processing)

Why supplier power is meaningful in Zürich:

- **Top farms are not infinite.** "Verified" farms implies you will be selective, which increases dependence on fewer high-quality suppliers.
- **Courier performance is the bottleneck.** If your promise is next-morning reliability, then dependable courier capacity becomes scarce on peak days.
- **Seasonality changes the balance.** In some seasons, certain items are abundant; in others, the best farms can be fully booked.

What it means (practical):

- You need **multi-sourcing** for key categories (so one farm issue doesn't break the menu).

- You need **redundant delivery capacity** and clear SLAs (because delivery is not "just logistics"—it is the product).

3.2 Buyer power — 8/10 (high)

Who the buyers are:
Independent bistros and mid-sized restaurants in Zürich (chefs or purchasing managers).

Why buyer power is high:

- **Many alternatives exist today.** Restaurants can buy from local wholesalers, farm shops with delivery, online grocers like **Farmy.ch**, or substitutes like **Aligro** (cash-and-carry).
- **Switching can be fast.** If a restaurant gets two late deliveries or a few quality misses, they can revert to their current supplier immediately.
- **They can negotiate by threatening to leave.** Especially if they place frequent orders, they may ask for lower fees or better terms.

What it means (practical):

- You must compete on **reliability + workflow relief**, not just "local."
- The monthly plan should feel like a **service guarantee** (not a "nice-to-have membership").

3.3 Competitive rivalry — 8/10 (high)

Who you're up against (named rivals in your market):

- **Local wholesale distributors** (direct competitor)
- **Farm shops with delivery** (direct competitor for local sourcing)
- **Farmy.ch** (direct/adjacent competitor as online ordering + delivery)
- **Aligro** and other cash-and-carry patterns (indirect competitor)

Why rivalry is intense in Zürich:

- **Incumbents already own relationships.** Wholesalers are embedded in restaurant routines.
- **Competitors can bundle.** Wholesalers can offer "everything in one drop," not just produce. That's hard to match early.
- **There's limited patience for experimentation.** Kitchens are busy; if your ordering or fulfillment feels uncertain, they default back to what works.

What it means (practical):

- Win a **narrow wedge** first: "best next-morning local produce workflow in Zürich," then expand categories later.
- Your "unfair advantage" has to be operational (delivery + standards), not just a prettier app.

3.4 Threat of substitution — 7/10 (high)

Substitutes beyond direct competitors:

- **Self-pickup at Aligro** (or other cash-and-carry): predictable availability, predictable price
- **Weekly markets** and direct farmer relationships: freshness + story, often flexible
- **Wholesaler "daily staples"**: consistent and simple even if less "local"

- **Chefs changing menus to reduce complexity** (e.g., fewer fresh SKUs)

Why substitution is strong:

- The core job is "get ingredients tomorrow morning without drama." Many paths can achieve that—even if they are less "local platform" aligned.

What it means (practical):

- Reduce the substitute appeal by being **the least-drama option**: fewer mistakes, better substitutions, easier admin.
- Make it easy to place a **small daily order** without feeling "fee punished" (this ties directly to your delivery fee + service fee design).

3.5 Threat of new entry — 6/10 (moderately high)

Why entry is not trivial:

- The app is easy to copy; the **Zürich-specific operations** are not.
- Next-morning delivery with standards requires real coordination: farms, packaging, routing, customer support, exception handling.

Why entry is still plausible:

- A motivated local team (or an existing logistics player) can start in Zürich with a focused niche, especially if they already have delivery capacity.
- Existing competitors (including wholesalers or Farmy.ch-style platforms) can add a "chef workflow" layer.

What it means (practical):

- Your defense is **execution + relationships**: trusted farms, trusted restaurants, and a reputation for reliability.
- Build "hard-to-copy" assets early: SOPs, quality processes, and a recognizable brand among Zürich chefs.
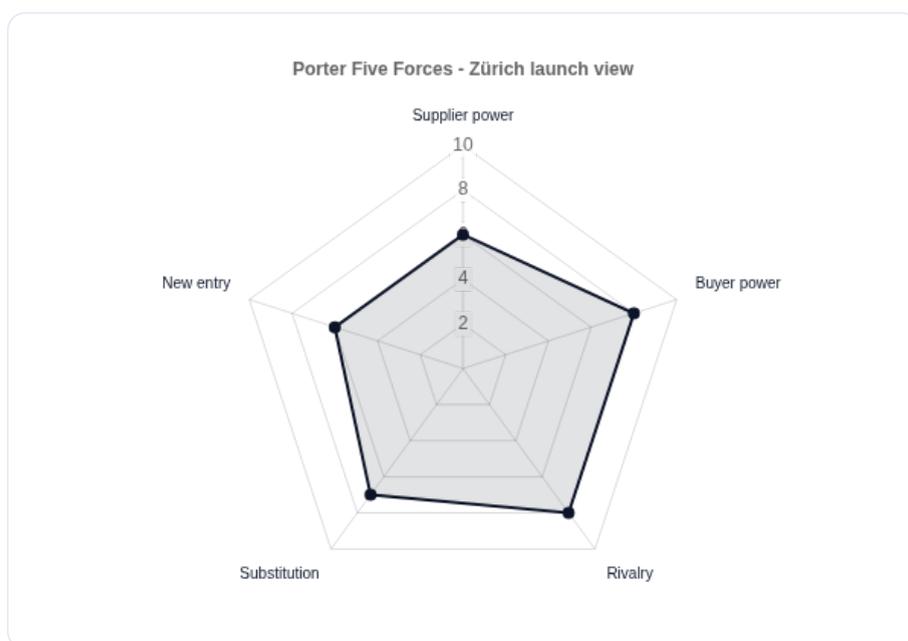

Figure 2: A radar snapshot of competitive pressure for a Zürich-first farm-to-restaurant next-morning delivery platform—higher values mean tougher economics unless you differentiate through reliability and workflow relief.

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4) Overall industry attractiveness score (for this concept in Zürich)

Force-by-force summary (lower is better for profitability)

- Supplier power: **6/10**
- Buyer power: **8/10**
- Competitive rivalry: **8/10**
- Threat of substitution: **7/10**
- Threat of new entry: **6/10**

Average force intensity: (6 + 8 + 8 + 7 + 6) / 5 = **7.0 / 10**

Industry attractiveness score (higher is better)

To convert "pressure" into an "attractiveness" score, a simple way is:
Attractiveness = 11 − average force intensity
So: **11 − 7.0 = 4.0 / 10**

Overall attractiveness (Zürich launch): 4/10

What that score really means (plain language)

- This is **not** an easy market where you win by launching an app. The economics are tough because restaurants have options, incumbents are strong, and reliability is expensive.
- But it *can* still be a good business if you win on the few things competitors don't deliver well for chefs:
  1. **next-morning reliability**,
  2. **restaurant-ready standards**, and
  3. **admin simplicity** (consolidated invoicing + predictable receiving windows).

If you execute those three in Zürich, you create a defensible "chef habit" that can travel to Lausanne and Geneva with the same operational blueprint.

Pricing Strategy Analysis

1) What "pricing" really means for this business (Zürich first)

You're not just pricing "delivery." You're pricing a bundle that a busy Zürich chef actually cares about:

- **Reliable next-morning delivery** within ~30–40 km of Zürich (predictable slot, fewer surprises)
- **Restaurant-ready ordering** (units, pack sizes, substitutions that make sense in a kitchen)
- **Verified Swiss farms + seasonal availability** (menu planning support, not random stock)
- **One clean invoice** instead of admin chaos (consolidated billing)

So the pricing has to do three things at once:

1. **Feel normal to restaurants** (your stated willingness: **CHF 8–15 per delivery + 5–10% fee**, or **CHF 250–400/month** for "daily ordering + guaranteed freshness").
2. **Cover real costs** (cold-chain handling, routing, support, payment fees, ops coordination).
3. **Drive the behavior you want** (bigger, consolidated orders; fewer emergency exceptions; predictable routes).

The best structure for Zürich is a **hybrid**:

- A **per-delivery fee** (covers "a vehicle showed up at your door, on time, cold chain intact")
- A **% service fee** on the basket (scales with value and covers the platform + ops layer)
- An optional **monthly plan** that buys "priority" (guaranteed slots, earlier cutoff, fewer headaches)

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2) Competitor pricing audit (Zürich-first reality check)

Below is how restaurants in Zürich typically pay today—either with obvious fees (delivery, minimums) or hidden costs (time, shrink, chaos).

A) Farmy.ch (online grocer / direct competitor for convenience, not restaurant-fit)

What their pricing model looks like (publicly visible elements):

- **Minimum order value: CHF 50.00**
- **Minimum quantity surcharge: CHF 7.90 for order value below CHF 100.00**
- **Shipping costs:** "delivery-dependent shipping costs" (varies; not clearly displayed in a static pricing table)

Packaging / "kitchen fit":

- Broad assortment, but often **consumer-style pack sizes**.
- For a restaurant, the friction is usually: pack-size mismatch, substitutions, and availability not optimized for "service tomorrow morning."

What this means for your pricing:

- Farmy sets a reference point that **minimums + small-order penalties are normal** in Zürich delivery commerce.
- Your edge is not "cheaper"; it's "built for chefs + next morning + consolidated invoice."

B) Aligro (cash-and-carry; indirect competitor for price + control)

What their pricing model looks like:

- The "price" restaurants feel is often:
  - **Low unit prices** (especially when buying case packs)
  - **No explicit service fee**
  - But **you pay with time** (someone must go) and **inventory risk** (overbuying / spoilage)

Public pricing visibility:

- In practice, detailed price browsing commonly requires **login / market selection**, so it's not a simple public "pricing page."

Packaging / "kitchen fit":

- Strong on **case packs** and bulk formats.
- Great if you have time to go, space to store, and tight prep control.

What this means for your pricing:

- You can charge a fair fee if you save **1–2 trips/week** or reduce "we ran out, go now" moments—because those moments are expensive in Zürich labor terms.

C) Local wholesale distributors (direct competitor for routine supply)

What their pricing model looks like (typical structure):

- Often **contract / account-based pricing** (not a public price list)
- Commonly **minimum order thresholds** to make delivery economics work
- Delivery is usually **scheduled**, but not always "next-morning from farms" and not always "seasonal menu guidance"

Packaging / "kitchen fit":

- Usually strong: predictable SKUs, standardized grades, case sizes.
- Weak spot versus your offer: local-farm variety + seasonality intelligence + multi-farm consolidation built specifically for chefs.

What this means for your pricing:

- Distributors normalize the idea that **reliability costs money**.
- Your pricing should look "procurement-professional" (clear tiers, predictable rules, no gimmicks).

D) Farm shops with delivery (direct competitor for authenticity + freshness)

What their pricing model looks like (typical):

- Retail-ish product pricing, sometimes with a **delivery fee** and/or **minimum order**
- Usually **single-supplier** (one farm), so restaurants still juggle multiple suppliers to cover a full list

Packaging / "kitchen fit":

- Often mixed:
  - Great freshness story
  - But inconsistent: pack sizes, labeling, substitutions, invoice format

What this means for your pricing:

- Your platform can charge for **reducing supplier juggling** and **standardizing packaging/invoicing**—because that's real pain for Zürich chefs.

Figure 1: Side-by-side comparison of minimum order levels and small-order penalties relevant to Zürich restaurant purchasing. Farmy.ch values are publicly listed; "typical" farm shop and distributor figures vary by supplier and are shown as practical Zürich market estimates.

Farmy shipping fees page

Farmy.ch shipping and minimum order info shown on Toppreise dealer profile

Aligro login page - product pricing commonly requires login or market selection

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3) Value-based pricing model (price it based on what you save the restaurant)

A simple way to value your service: **time saved + waste reduced + fewer "service problems."**
Below are conservative Zürich-first calculations using kitchen reality, not theory.

Step 1: Put a CHF value on time (because time is what chefs don't have)

Assumptions for Zürich:

- Fully-loaded cost of a chef/purchasing manager's hour (wage + overhead): **~CHF 45–70/hour**
- Time spent today on ordering and chasing supply (multiple suppliers, calls, WhatsApp, invoices): **~30–60 minutes/day** for produce-heavy kitchens

Conservative time value:

- 0.5 hours/day × CHF 55/hour = **CHF 27.50/day**
- Over ~22 operating days/month: **CHF 605/month**

Even if you only save **half** of that, it's still **~CHF 300/month**.

Step 2: Put a CHF value on reduced waste and "wrong product" errors

If your platform improves freshness and pack-size fit, even small improvements matter.

Assumptions:

- Monthly produce spend (typical independent restaurant range): **CHF 4,000–10,000/month**
- Waste/spoilage or "we couldn't use it" reduction with better planning + next morning: **0.5%–2%**

Example at CHF 6,000/month produce spend:

- 1% reduction = **CHF 60/month**
- 2% reduction = **CHF 120/month**

Step 3: Put a CHF value on fewer "menu disruption" moments

This is the hardest to price precisely, so keep it conservative:

If your reliability prevents just **one** "we're out of X" situation that would otherwise cause:

- a same-day emergency run (labor + travel) or
- a compromised menu item (lower guest satisfaction)

It's easily **CHF 50–150/month** in avoided fire drills for many kitchens.

Value summary (conservative)

For a Zürich restaurant, monthly value is often:

- **CHF 300–600** (time)

- **CHF 60–120** (waste)
- **CHF 50–150** (fire drills avoided)
  Total: ~CHF 410–870/month

That supports your stated willingness of **CHF 250–400/month** for a priority plan *and/or* per-delivery + % fees—especially if you deliver truly next morning with predictable slots.

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4) Cost-plus analysis (your floor price: don't price below physics)

You need a price floor that covers variable costs per delivery and leaves enough margin to pay fixed costs (ops coordinator, software, support, sales).

A) The real variable costs per Zürich restaurant delivery (typical ranges)

For a next-morning consolidated drop (30–40 km radius), a practical variable cost stack looks like:

- **Courier partner cost per drop:** CHF 8–14
- **Cold-chain crate handling (cleaning, loss, depreciation):** CHF 1–3
- **Pick/pack coordination + exceptions (ops time, labeling):** CHF 2–6
- **Payment processing + support overhead per order:** CHF 1–3

Variable cost ballpark: CHF 12–26 per delivery

If you charge **CHF 8–15 per delivery**, you may be **below** true variable cost unless:

- you negotiate strong courier rates,
- drops are dense (many deliveries in one route),
- and exceptions are rare.

B) Why the % service fee matters

Your % fee is what scales with order size and funds the parts that restaurants don't see:

- farmer onboarding + verification
- standard packaging rules
- seasonal availability planning
- routing and exception handling
- platform development and maintenance

C) A clean "floor price" rule of thumb (Zürich)

To avoid losing money per delivery, aim for:

- **Delivery fee charged to restaurant:** target **CHF 10–12** (not CHF 8) for Starter/Plus
- **Plus a service fee: 6–8%** (fits stated willingness of 5–10%)

Example floor check (order value CHF 220):

- 6% fee = CHF 13.20
- delivery fee CHF 12
- total revenue per delivery = **CHF 25.20**

If your variable costs are ~CHF 16–20, you still have **CHF 5–9 contribution** per delivery to pay fixed costs. That's workable if volume grows.

5) Price elasticity estimate (how sensitive Zürich restaurants will be)

In plain terms: **some restaurants will be very price-sensitive, others will pay for "no surprises."** The trick is to aim your default tier at the middle, and use the other tiers to catch the extremes.

Segment-level sensitivity (Zürich launch)

- **Price-sensitive buyers (higher elasticity):**

  - smaller bistros with tight cash flow

  - kitchens that already do Aligro runs efficiently

  - restaurants that can accept "not always next morning"

  - Likely reaction: if you move from **6% → 8%**, some will churn unless you show clear operational value.

- **Reliability buyers (lower elasticity):**

  - busy kitchens where the chef is also the buyer

  - places that change menus with seasonal Swiss produce

  - teams that hate admin and invoice chaos

  - Likely reaction: they'll accept a higher fee if the service is consistent and saves time.

Practical elasticity guidance (what to expect when you change price)

For Zürich-first go-to-market, a reasonable working estimate is:

- **Every +1 percentage point** on service fee (e.g., 6% → 7%) can reduce conversion **~5–12%** among price-sensitive prospects *unless* you also improve something visible (earlier cutoff, guaranteed slot, fewer substitutions, better invoice flow).

- **Delivery fee changes** are psychologically "louder" than % fee changes:
  - CHF 10 → CHF 12 is noticed immediately
  - 6% → 6.5% is often tolerated if performance is strong

So: keep delivery fees stable and simple; do most optimization with tiering and value add.

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6) Psychological pricing tactics (simple, ethical, and effective)

These tactics work in B2B when they're honest and tied to real differences.

A) Anchoring (make the middle tier feel safe)

- Put a premium plan (Priority) at **CHF 299/month** so:
  - the Plus tier feels "reasonable"
  - the Starter tier feels "safe to try"

B) Charm pricing (use it selectively in Switzerland)

B2B buyers in Switzerland often prefer clean numbers, but charm pricing can work for **monthly plans**:

- **CHF 299/month** reads meaningfully lower than CHF 300 without looking gimmicky.

For per-delivery fees, keep it clean:

- **CHF 12** is easier for invoices than CHF 11.90.

C) Decoy strategy (a plan that steers behavior)

Design Plus so it's the "default," and Priority is for operations-heavy kitchens.

Example:

- Starter: cheaper but fewer operational guarantees
- Plus: best balance for most kitchens
- Priority: for "we cannot miss tomorrow morning" kitchens

The decoy effect happens when Plus is clearly the best tradeoff, not when you try to trick people.

D) Make the fees feel fair (fee framing)

Restaurants accept fees when they're:

- **predictable**
- **tied to reliability**
- **transparent on the invoice**

A simple invoice line like:

- "Next-morning consolidated delivery (Zürich route): CHF 12"
- "Service fee 6%: CHF X" ...reduces pushback.

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7) Tiering recommendation: 3 Zürich-first tiers (with feature allocation)

These tiers are designed to match your stated willingness-to-pay and to keep unit economics sane inside a 30–40 km Zürich radius.

Tier 1 — Starter (best for early adoption and smaller kitchens)

Price

- **CHF 12 per delivery**
- **6% service fee** on order value

What they get

- Next-morning delivery within Zürich + nearby canton (30–40 km), **standard slot**
- Verified Swiss farms (basic)
- Consolidated invoice (weekly)
- Basic substitutions (only within pre-approved rules)
- Standard cutoff time (e.g., early evening)

What they *don't* get (by design)

- Guaranteed delivery slot if routes overflow
- Early cutoff / priority fulfillment
- Dedicated support response times

Why this tier exists

- Matches the stated willingness (CHF 8–15 + 5–10%)
- Keeps pricing simple for the first 10–15 restaurant validations

Tier 2 — Plus (the default tier you want most Zürich restaurants on)

Price

- **CHF 10 per delivery**
- **8% service fee**

What they get

- Next-morning delivery with **priority sloting** versus Starter
- Earlier cutoff time (useful for real kitchens)
- Better substitutions: "chef-friendly" rules (size/variety/grade controls)
- Consolidated invoice (weekly or biweekly) + simple cost-center tagging
- Seasonal availability feed + "menu planning suggestions" view
- Multi-user accounts (chef + purchasing manager)

Why this tier wins

- The extra 2% fee pays for fewer failures: better routing priority + more ops attention
- It's easy to justify because it's tied to visible reliability improvements

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Tier 3 — Priority (for daily ordering + guaranteed next morning)

Price

- **CHF 299 per month**
- **6% service fee**
- **CHF 0 delivery fee** for standard Zürich-area next-morning drops (within the defined radius)

What they get

- Guaranteed delivery slot (within policy)
- Earliest cutoff time
- Highest fulfillment priority when supply is tight
- Best support SLA (fast responses for exceptions)
- "Seasonal lock-in" options (reserve quantities with farms when possible)
- Monthly account review (what's working, what to change)

Why this tier is powerful

- It matches the stated willingness of **CHF 250–400/month** for daily ordering + guaranteed freshness.
- It reduces per-order friction ("free delivery") and encourages **frequent ordering**, which makes routing density better in Zürich.

Important guardrail

- Define "free delivery" precisely:
  - within the Zürich 30–40 km service area
  - next-morning standard window
  - reasonable order minimum (e.g., CHF 120+) to protect economics
    You can keep the plan attractive while preventing loss-making micro-orders.

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8) Discount strategy (when to discount, how much, and for whom)

Discounting should buy you something valuable: density, proof, or long-term retention. Don't discount just to feel busy.

A) Early adopter offer (best for first 10–15 Zürich restaurants)

Goal: get fast validation and references.

Offer one of these (pick one, keep it simple):

- **Waive first-month delivery fees** (up to a cap, e.g., 10 deliveries), *or*
- **Reduce service fee by 1 percentage point** for 60 days (e.g., 6% → 5%)

Avoid discounting Priority too heavily; it anchors your value.

B) Route-density discount (discount that improves your unit economics)

If a restaurant chooses a delivery slot that makes routing easier (dense neighborhoods, predictable days):

- Discount **CHF 2 per delivery** (e.g., CHF 12 → CHF 10)

This is "discounting that pays for itself."

C) Volume-based discount (only after behavior is proven)

After 2–3 months of consistent ordering:

- If monthly GMV exceeds a threshold (example: CHF 6,000/month), reduce fee:
  - Plus **8% → 7.5%** This keeps high-value customers without breaking pricing for everyone.

D) "Farm onboarding" discount (use carefully)

You plan to charge farms a small onboarding fee for packaging standards and listing. You can discount it if:

- the farm agrees to your packaging + labeling rules immediately
- and commits to availability updates
  That reduces ops burden.

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9) Revenue projection: 3 pricing scenarios (Zürich launch year)

Below is a practical first-12-month model for **Zürich city + 30–40 km radius** after paid launch. It uses your recommended hybrid pricing and realistic adoption.

Common assumptions (kept simple)

- Orders per restaurant per week:
  - Conservative: **3**
  - Moderate: **4**
  - Aggressive: **5**

- Average order value (produce + farm items per drop):
  - Conservative: **CHF 180**
  - Moderate: **CHF 220**
  - Aggressive: **CHF 250**

- Delivery fee average:
  - Conservative/Moderate: **CHF 10**
  - Aggressive: **CHF 9** (more density → lower average)
- Priority plan:
  - Price: **CHF 299/month**
  - Adoption:
    - Conservative: **10%**
    - Moderate: **20%**
    - Aggressive: **25%**
- Service fee average:
  - Conservative: **6%**
  - Moderate: **7.5%** (mix of Starter + Plus + Priority)
  - Aggressive: **8.5%** (more value delivered, more Plus adoption)

What the scenarios imply

- **Conservative** = slow, steady adoption; good for proving ops and unit economics.
- **Moderate** = healthy growth; aligns with "paid launch in ~6 months" + strong delivery performance.
- **Aggressive** = requires excellent routing, farmer supply depth, and tight execution of next-morning reliability.
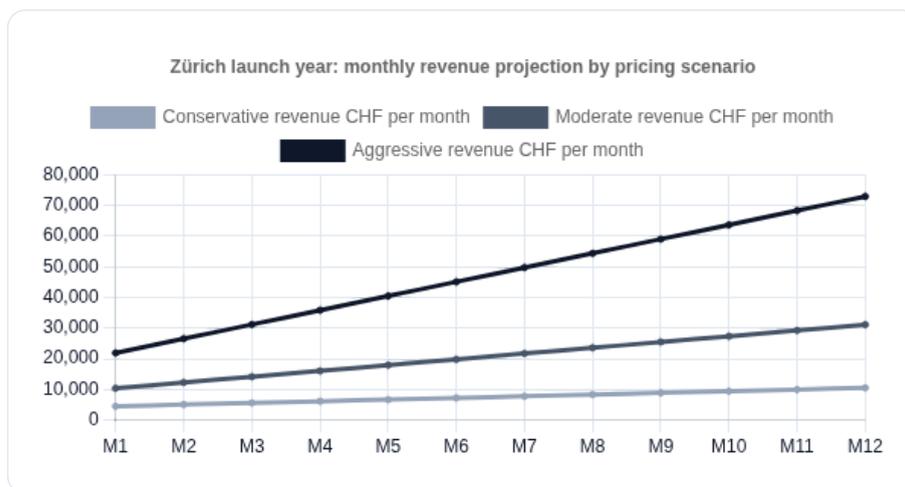
Figure 2: Projected monthly revenue trajectories over the first 12 months post-launch in Zürich, under conservative, moderate, and aggressive adoption and pricing mixes.

10) Monetization opportunities (upsells, cross-sells, and usage-based add-ons)

These are add-ons that fit Zürich restaurant reality and keep your core price clean.

A) Upsells (higher value, same customer)

1. **Guaranteed early delivery window add-on** (if not on Priority)
   - Example: **CHF 49–99/month**

- Why it sells: brunch places, high-prep kitchens, and small teams.

2. **Seasonal menu planning pack** (lightweight but valuable)

   - Example: **CHF 39–79/month**

   - Includes: "what's strong this week," suggested swaps, and cost impact.

3. **Packaging upgrades** (chef-friendly formats)

   - Example: **CHF 2–5 per delivery** or **CHF 19/month**

   - Includes: standardized labeling, lot tracking, tighter substitution rules.

B) Cross-sells (more basket share)

1. **Add-on categories that increase order value without killing ops**

   - Herbs, microgreens, specialty items from verified farms

   - Simple dairy/eggs if cold chain is already in place
     Cross-sell success metric: higher CHF per drop makes delivery economics better.

2. **Weekly "chef staples" list**

   - Curate a small list that restaurants reorder often.

   - Less browsing = more repeat orders.

C) Usage-based pricing (only where it matches cost)

1. **Extra stop / split delivery fee**
   If a restaurant asks for two drop locations or split time windows:

   - Charge **CHF 10–20** per extra stop
     This protects your routing economics.

2. **Late cutoff fee** (behavior-shaping, not punitive)

   - Example: **CHF 15–30** for "after cutoff but still next morning"
     Use sparingly; it's mainly to keep ops sane.

D) Farm-side monetization (keep it small and tied to standards)

Since your core commission comes from restaurants, keep farm fees simple:

- **One-time onboarding fee** (packaging standards + listing + first QA): **CHF 150–350**
- Optional paid upgrades:
  - "Featured farm" placement during peak season
  - Packaging support (labels, crate tracking)

The rule: farm monetization should **reduce ops cost** or **increase order success**, not feel like rent.

Zürich-first pricing recommendation (the "most likely to work" setup)

If you want one clear recommendation to implement for the Zürich pilot and paid launch:

- **Starter:** CHF 12/delivery + **6%** fee
- **Plus:** CHF 10/delivery + **8%** fee
- **Priority: CHF 299/month** + **6%** fee + **free standard deliveries** in Zürich service area (with a sensible minimum order policy)

This stays inside what your target customer already said they'll pay, while giving you enough room to run a real next-morning operation without pricing below your costs.

Go-To-Market Strategy

1) What we're trying to achieve (Zürich first, 30–40 km radius)

Primary goal (first 6 months)

Build a reliable "next-morning, restaurant-ready" ordering + delivery service in **Zürich city + nearby canton (30–40 km)** that:

- Wins **repeat weekly orders** from chefs (not just one-time curiosity).
- Proves **on-time delivery + consistent quality**.
- Creates a playbook that can be copied to **Lausanne**, then **Geneva**.

Success targets by phase (simple, concrete)

- **End of Pre-launch (60 days):**
  - **10–15 restaurants** have tried at least 1 order
  - **5 farms** onboarded with agreed packaging standards
  - On-time delivery ≥ **95%** on test routes

- **End of Post-launch (90 days after launch):**
  - **30–40 active restaurants** (active = ordered in last 14 days)
  - **10–12 farms** with dependable availability updates
  - **Repeat ordering ≥ 60%** week over week among active restaurants
  - At least **10 restaurants** on the CHF 299/month priority delivery plan (or a refined version that sells)

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2) Launch phasing (actionable timelines)

Phase A — Pre-launch (60 days) | "Prove demand + nail operations"

Objective: Get real orders moving in Zürich before you "announce" anything big.

Week-by-week playbook

- **Days 1–10: Build the minimum that sells**
  - Create a **chef-ready ordering flow** (can be simple): web form + WhatsApp confirmation + invoice
  - Create your **core product list** (fast-moving items): leafy greens, herbs, root veg, tomatoes seasonal, mushrooms, eggs if allowed
  - Define **delivery windows** (start with 2):
    - Slot 1: **06:00–08:30**
    - Slot 2: **08:30–11:00**
  - Write a **one-page "how it works"** for restaurants (PDF)

- **Days 11–25: Recruit supply (farms) and lock standards**

- Onboard **5 farms** within the delivery radius
- Standardize:
  - Pack sizes (e.g., 1 kg, 2.5 kg, crates)
  - Labeling (farm name, harvest date when relevant)
  - Substitution rules (what can be swapped, what cannot)
- Create a **daily cut-off time** (example: orders by **16:00** for next-morning delivery)
- **Days 26–45: Recruit demand (restaurants) with "concierge onboarding"**
  - Target **10–15 restaurants** in Zürich that already care about seasonal Swiss produce
  - Offer "concierge ordering":
    - Chef texts needs → you build cart → chef approves → next-morning delivery
  - Capture objections you must solve:
    - "What if you don't have it tomorrow?"
    - "Who do I call at 06:30?"
    - "I need one invoice, not five"

- **Days 46–60: Turn pilots into repeat habits**
  - Launch a **weekly seasonal availability message** every Sunday evening (for Monday planning)
  - Create **2–3 default baskets** (chef can tweak):
    - "Seasonal veg starter"
    - "Herbs and salad pack"
    - "Soup and prep pack"
  - Ask every active chef for one intro to a peer (referral loop)

What you do NOT do in pre-launch

- Don't overspend on ads.
- Don't expand beyond the 30–40 km service area.
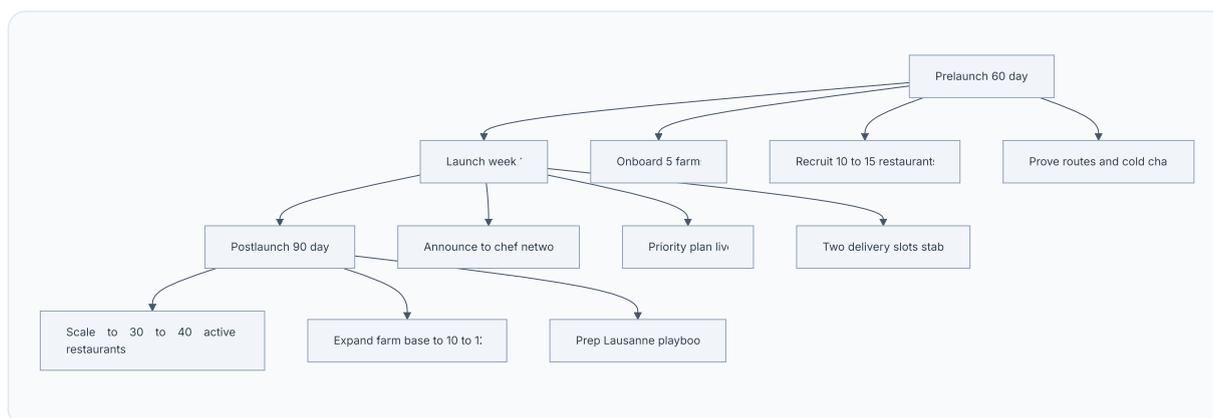- Don't offer too many SKUs; reliability beats variety.

Figure 1: Launch phasing from pre-launch validation to launch execution and 90-day scale-up.

Phase B — Launch (Week 1) | "Make it feel real and dependable"

Objective: Convert your pilot into a "this is our new way to buy produce" habit.

Day 1–2: Launch message to a tight list

- Email + WhatsApp to:
  - All pilot restaurants
  - Warm intros (friends of chefs, restaurant groups)

- Keep message short:
  - Cut-off time
  - Delivery windows
  - What makes you different vs **Farmy.ch** (consumer-first) and wholesalers (not seasonal-first)

Day 3–5: Make ordering frictionless

- Put your ops coordinator on a **hotline** during cut-off + delivery window
- Send a daily "today's best seasonal picks" (5 items max)

Day 6–7: Lock in repeats

- Offer a simple choice:
  - "Want this weekly basket automatically reserved for you?"

- Push the CHF 299/month plan only to restaurants that truly value reliability:
  - Busy bistros with daily prep pressure
  - Kitchens that hate last-minute supplier uncertainty

Phase C — Post-launch (90 days) | "Scale carefully, keep quality high"

Objective: Grow in Zürich without breaking service. Build the blueprint for Lausanne, then Geneva.

Month 1 (Days 1–30): Stabilize

- Standardize substitutions and refunds
- Create a "quality issue" playbook with photos + fast credit notes
- Add **2–3 farms** only if they improve reliability (not just variety)

Month 2 (Days 31–60): Add predictable growth loops

- Launch referrals:
  - Restaurant → restaurant (chef network)
  - Farm → restaurant (farm introduces their restaurant customers)

- Run 2 small chef tastings in Zürich (10–12 chefs each)

Month 3 (Days 61–90): Prepare the next city

- Document:
  - Farm onboarding checklist
  - Courier partner scorecard
  - Delivery route template
  - Seasonal planning cadence

- Start **Lausanne farm conversations** only once Zürich on-time + fill rate is stable.

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3) Channel strategy (ranked: top 7 acquisition channels by expected ROI)

> ROI here means: **fast, low-cost customer wins** in Zürich, with a high chance they reorder weekly.

#1 Direct chef outreach (walking + calling + warm intros)

Why it wins in Zürich: Chefs trust people and reliability more than ads—especially when they're comparing you to wholesalers and their current routine (including early **Aligro** runs).

- Tactics:
  - Build a list of 80–120 target restaurants in Zürich city
  - Do 15–20 short visits per week (off-peak hours)
  - Offer a first order with **concierge setup** in under 5 minutes

#2 Chef-to-chef referrals (your best "trust engine")

- Tactics:
  - "Introduce 1 chef friend, both get CHF 50 credit after their second order"
  - Ask at the moment of delight: right after a perfect delivery

#3 Partnerships with local restaurant groups and associations

- Examples in Zürich:
  - **GastroSuisse / local Zürich sections**
  - Local chef communities, restaurant collectives

- Tactics:
  - Member-only offer: priority delivery trial for 30 days
  - Invite association leaders to observe a delivery morning

#4 Farm-led introductions (use farms' existing restaurant relationships)

- Many farms already sell to a few restaurants informally.
- Tactics:
  - "If you introduce 3 restaurants, we waive onboarding fee"
  - Co-branded seasonal list: "From Farm X to Zürich kitchens tomorrow"

#5 Small chef tastings and kitchen demos (high impact, small scale)

- Not big trade shows; think:
  - 10 chefs in a small venue in Zürich
  - 6 seasonal items, 2 farms present, 30 minutes total

- Goal: compress trust-building into one evening.

#6 Google Search (high-intent, limited budget, very targeted)

- People search when they have a problem:
  - "regional gemüse lieferung zürich restaurant"
  - "bio gemüse grosshandel zürich" (and you position differently)

- You're not trying to outspend **Farmy.ch**. You're trying to capture **restaurant-intent** searches with a clear "built for chefs" landing page.

#7 LinkedIn outreach (targeted, not spam)

- Works best for:
    - Purchasing managers
    - Multi-location restaurant operators

- Tactics:
    - Short message + one clear ask: "Want a 10-minute call to see if next-morning seasonal delivery fits your kitchen?"
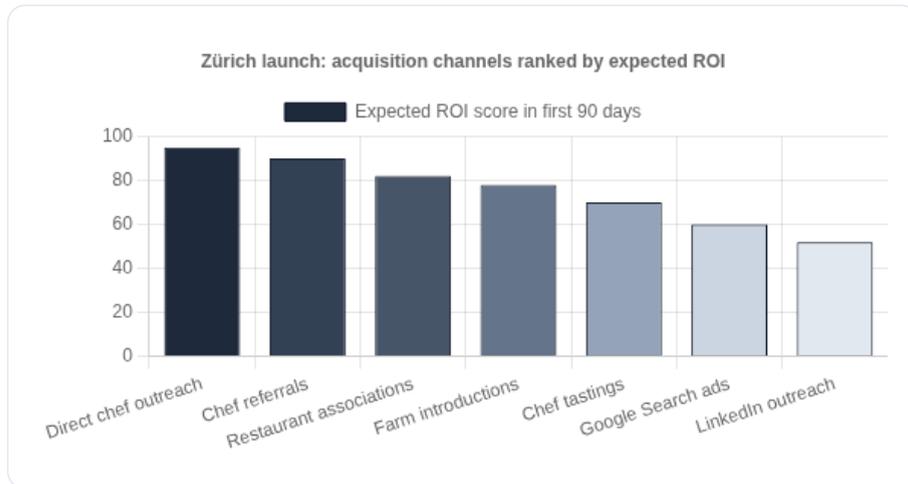
Figure 2: Expected ROI ranking of the top acquisition channels for a Zürich-first launch.

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4) Messaging framework (what you say, and how you prove it)

Core value proposition (one sentence)

"Next-morning, restaurant-ready Swiss produce from verified local farms—delivered in predictable time slots with one consolidated invoice, so chefs can plan menus and prep without last-minute sourcing runs."

Supporting message 1 — "Reliability beats randomness"

- What it means in plain terms:
    - You deliver when you said you would.
    - You don't leave chefs guessing at 06:00.

- Proof points to build immediately:
    - Publish on-time delivery rate weekly (even if only to customers)
    - Clear cut-off time and substitutions policy
    - Ops hotline during delivery windows

Supporting message 2 — "Built for chefs, not consumers"

- Direct contrast:
    - **Farmy.ch** is strong for household shopping; your edge is **chef workflow**.

- Proof points:
    - Pack sizes match kitchen prep
    - Predictable delivery windows (not "sometime tomorrow")

- Menu-planning seasonal list every week

Supporting message 3 — "Seasonal Swiss produce, without the early Aligro run"

- Direct contrast:
  - **Aligro** and cash-and-carry can be cheaper sometimes, but it costs time, planning, and morning stress.

- Proof points:
  - Next-morning delivery + one invoice
  - Seasonal availability planning message
  - Quality checks and quick credits if something is off

Simple "proof" assets to create (non-negotiable)

- **1-page service promise** (what you guarantee, what you don't)
- **Seasonal availability snapshot** (weekly)
- **Customer story** (even if it's a short quote after 3 good deliveries)
- **Farm verification checklist** (short and credible)

---

5) Content strategy (what to create at each funnel stage)

> Funnel in plain language: people first hear about you, then consider you, then try you, then stick with you.

Awareness (they just learned you exist)

Goal: Make it instantly clear you're Zürich-first and chef-built.

- Content:
  - Landing page: "Zürich next-morning produce for restaurants"
  - One short explainer: "How next-morning works in Zürich"
  - 3 farm spotlight posts (credible, local, simple photos)

Consideration (they're comparing you to wholesalers, farm shops, or Farmy.ch)

Goal: Reduce risk in their head.

- Content:
  - "Chef FAQ" (pricing, cut-off, delivery slots, substitutions, invoicing)
  - "What's different vs wholesalers" (plain-language comparison)
  - "Sample invoice" showing consolidated billing

Trial (first and second orders)

Goal: Make the first two orders effortless, because habits form fast.

- Content:
  - First-order checklist (2 minutes)
  - "Starter basket" templates (seasonal veg, herbs, salad)
  - WhatsApp order template message chefs can copy/paste

Retention (repeat weekly orders)

Goal: Become their default.

- Content:
    - Weekly seasonal planning message (Sunday evening)
    - "What's coming next week" forecast
    - Short monthly kitchen feedback form (5 questions)

Supply-side content (farms)

Goal: Make farms confident you won't create chaos.

- Content:
    - Packaging and labeling guide (1 page)
    - Cut-off + pickup expectations
    - "What sells to Zürich restaurants" cheat sheet

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6) Partnership opportunities (5 that can accelerate Zürich growth)

1) Restaurant associations and local networks

- Why it helps: instant trust + concentrated access to decision makers
- Examples to pursue:
    - **GastroSuisse** local Zürich groups
- Activation idea:
    - "Member pilot: priority delivery trial + seasonal menu planning sheet"

2) Zürcher Bauernverband and regional farm networks

- Why it helps: faster farm onboarding + credibility
- Activation idea:
    - Co-host a "Meet the buyer" morning (farms + 10 chefs)

3) Culinary schools and hospitality training programs

- Zürich now, Lausanne later (and then Geneva)
- Why it helps: long-term pipeline + credibility with chefs
- Activation idea:
    - Seasonal product demo day + student kitchens using your basket

4) Cold-chain logistics suppliers (crates, insulation, handling)

- Why it helps: protects the promise (freshness) as you scale
- Activation idea:
    - Discounted crate lease or sponsorship for pilot visibility

5) Restaurant software and POS partners

- Why it helps: distribution into existing restaurant workflows
- Activation idea:
    - A simple integration roadmap + joint webinar: "How to cut produce ordering time"

7) Budget allocation (how to split a pilot marketing budget across channels)

Assume **CHF 20,000** marketing budget for the pilot (as planned). The split below matches what wins early in Zürich: human trust + proof + a little targeted demand capture.

Recommended split (CHF 20k)

- **Direct chef outreach support — 20% (CHF 4,000)**
  - Printing, samples, basic CRM tooling, small travel/visit costs

- **Chef tastings and small demos — 25% (CHF 5,000)**
  - Venue, product samples, simple filming/photos, farm participation support

- **Referral incentives — 10% (CHF 2,000)**
  - Credits triggered after second order (avoids "freebie hunters")

- **Restaurant association partnerships — 10% (CHF 2,000)**
  - Member offer, small event sponsorship, co-marketing materials

- **Google Search ads — 15% (CHF 3,000)**
  - Zürich-only, restaurant keywords, strict negative keywords to avoid consumer traffic

- **Content (photo, simple video, case study) — 15% (CHF 3,000)**
  - 1 landing page, 1 case study, farm profiles

- **PR and local press — 5% (CHF 1,000)**
  - One strong story: "Zürich chefs get next-morning seasonal Swiss produce"
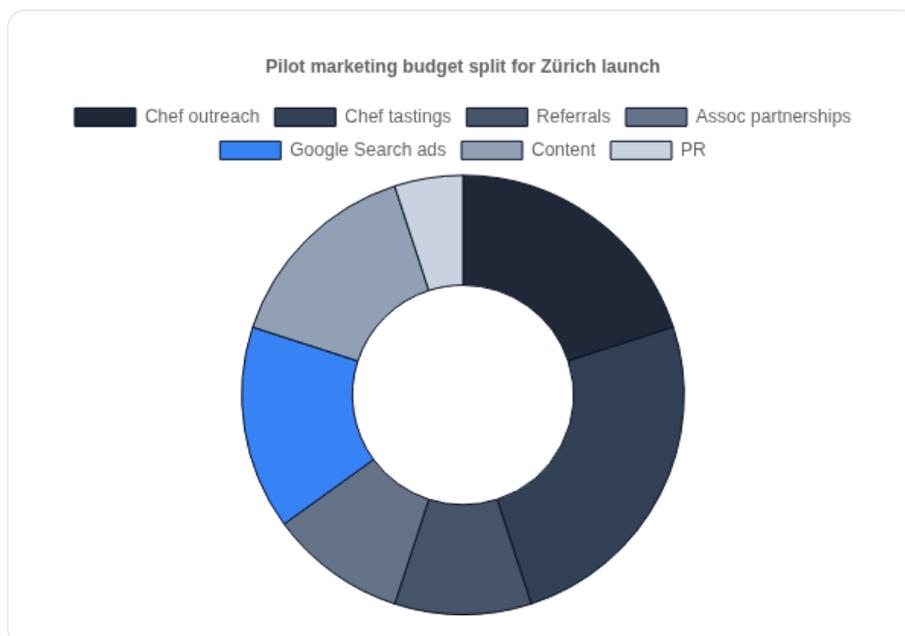

Figure 3: Suggested allocation of a CHF 20k pilot marketing budget across the highest-leverage channels.

8) KPI framework (10 metrics to track weekly, with target benchmarks)

Track these weekly from day 1. They keep you honest on both growth and service quality.

1. **Active restaurants**

- Target: **10–15** by day 60; **30–40** by day 180

2. **New restaurant trials per week**

- Target: **3–5/week** during pre-launch; **5–8/week** for first 4 weeks post-launch

3. **Repeat order rate (week to week)**

- Target: **≥ 60%** among active restaurants by day 90 post-launch

4. **Average orders per active restaurant per week**

- Target: **1.5–2.5** by day 90 post-launch

5. **On-time delivery rate**

- Target: **≥ 95%** (and keep it there before adding new zones)

6. **Order fill rate (items delivered as ordered)**

- Target: **≥ 92%** (with clear substitution rules)

7. **Quality issue rate (credits / complaints per order)**

- Target: **≤ 3%** by day 90 post-launch

8. **Average order value**

- Target: grow toward **CHF 180–350** depending on segment (bistros vs larger kitchens)

9. **Take rate achieved (commission actually captured)**

- Target: consistent **6–10%** without heavy discounting

10. **Priority plan conversion (CHF 299/month)**

- Target: **5 customers** by day 30 post-launch; **10–15** by day 90 post-launch (only if it truly improves retention)

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9) Risk mitigation (top 5 launch risks + contingency plans)

Risk 1: Delivery failures damage trust fast

- What causes it: courier no-shows, route overload, missing crates
- Contingency plan:
  - Keep **capacity buffer** (don't sell beyond what you can deliver)
  - Have **2–3 courier partners** and a clear fallback rotation
  - "If late by more than X minutes → automatic credit" (simple, consistent)

Risk 2: Supply gaps and last-minute unavailability

- What causes it: farms not updating availability; weather swings
- Contingency plan:
  - Daily farm confirmation process (simple "yes/no" list)
  - Pre-approved substitution list per restaurant
  - Maintain a small "backup supply" option (careful: use wholesalers selectively without breaking the promise)

Risk 3: Price pushback vs wholesalers or Aligro

- What causes it: chefs compare sticker price, not total cost of time
- Contingency plan:
  - Sell the "no early run + one invoice + predictable delivery" bundle
  - Offer 2 tiers:
    - Standard delivery
    - Priority plan for kitchens that value reliability most
  - Use a "first 2 orders" onboarding credit, not permanent discounts

Risk 4: Invoicing complexity and admin pain

- What causes it: multiple farms, multiple documents, disputes
- Contingency plan:
  - Consolidated invoice must be perfect from day 1
  - Clear line items: farm source, weights, credits
  - Weekly invoice cadence option for trusted customers

Risk 5: Competitor reaction (wholesalers, farm shops, Farmy.ch)

- What it looks like: promos, "we also deliver," undercutting
- Contingency plan:
  - Don't play a price war; play a workflow + reliability game
  - Publish service standards and performance metrics privately to customers
  - Lock in repeat habits with seasonal planning + reserved weekly baskets

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10) Quick wins (first 14 days tactics that can generate traction)

Quick win 1: "Founding Zürich Kitchens" program (10 spots)

- Offer:
  - Priority delivery trial
  - Concierge ordering setup
  - Early access to weekly seasonal forecast

- شرط (simple rule):
  - They must place **2 orders in 14 days** to keep benefits

Quick win 2: Sunday evening seasonal planning message (even before launch)

- Send to all pilot chefs:
  - 8–12 items, short notes, what's best this week

- Why it works:
  - You enter their menu planning moment, not their panic moment.

Quick win 3: One mini tasting night with two farms (10 chefs max)

- Keep it tight:
  - 45 minutes
  - 6 ingredients

- One clear CTA: "Place a trial order by Wednesday 16:00 for Thursday morning delivery"
- Collect:
  - 2–3 video quotes for your landing page (simple, real)

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11) Zürich-first operating rules (so growth doesn't break the product)

- **Protect the radius:** stay within **30–40 km** until delivery performance is stable.
- **Protect the cut-off:** no endless exceptions; reliability is the brand.
- **Protect the SKU count:** expand variety only when availability updates are consistent.
- **Protect the "one invoice" experience:** this is a key reason restaurants switch from farm-by-farm buying.
- **Only expand to Lausanne and Geneva once Zürich is boringly reliable:** the playbook must be repeatable, not heroic.

Customer Journey Mapping

This is the end-to-end journey for a chef or purchasing manager at an independent bistro or mid-sized restaurant in **Zürich city + ~30–40 km** who wants **reliable next-morning Swiss produce** without the daily hassle.

Journey map (Zürich launch)
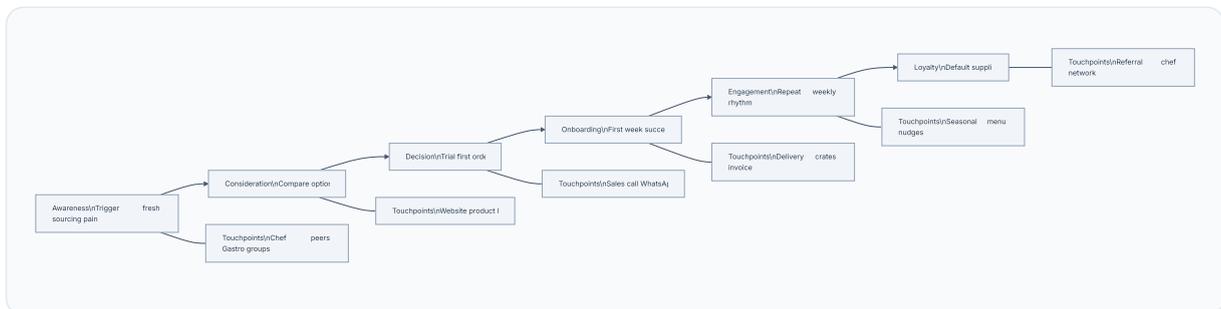
Figure 1: Customer journey flow from first awareness to loyalty, with the key touchpoints that matter in Zürich.

Stage 1 — Awareness (first discovery)

Customer actions

- A chef realizes Monday morning ordering is chaos again (missing items, poor quality, last-minute substitutions).
- They ask other chefs: "Who delivers Swiss seasonal produce reliably in Zürich?"
- They notice:
  - A chef friend posting a "local farm box for restaurants" story
  - A mention in a Zürich chef WhatsApp group
  - A supplier flyer or card at a local food event / farm tasting
- They do a quick search during prep downtime: "local farm delivery Zürich restaurant", "Swiss seasonal produce delivery".

What they think

- "I don't need another marketplace. I need something that *shows up tomorrow morning*."

- "If it saves me time and reduces surprises, I'll pay a bit more."

Emotions (typical)

- **Frustrated → cautiously curious**

- Stress is high because tomorrow's mise en place depends on it.

Touchpoints (digital + physical)

- Word-of-mouth from chefs (strongest in Zürich)

- WhatsApp messages and quick links

- A simple landing page explaining:
  - next-morning delivery window

  - Zürich radius coverage

  - verified Swiss farms

  - consolidated invoicing

- A one-page PDF / printed card for chefs (kitchen-friendly)

Pain points + friction

- "Is this real or just marketing?"

- Fear of operational risk: "If they fail once, service is ruined."

- Confusion about coverage: "Do they deliver to my postcode and my preferred time?"

Opportunities to delight

- A **30-second promise** that is very concrete:
  - "Order by X pm → delivered next morning in Zürich in a predictable slot."

- Show **2–3 real restaurant examples** (even anonymized at pilot stage):
  - "Independent bistro in Kreis 4 receives 06:30–07:00 slot"

- Clear "what happens when something is unavailable" policy (substitution rules chosen by chef).

Key metrics to track

- Source of leads (chef referral vs search vs events)

- Website conversion to contact (CTA clicks)

- Cost per qualified lead (especially for Zürich)

- Time to first response (minutes/hours)

Recommended tools/tactics

- **Chef-to-chef referral engine**
  - "Invite a chef, both get CHF X credit on the next invoice"

- **Local credibility placements**
  - Partner with Zürich food communities and associations (events, newsletters, member groups)

- **Fast response loop**
  - WhatsApp Business + a simple inbound form that triggers an immediate confirmation message

- **Coverage clarity**
  - A postcode checker or "delivery radius map" for Zürich + nearby canton

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Stage 2 — Consideration (they compare and validate)

In Zürich, they almost always compare you against a mix of:

- **Farmy.ch** (online grocery convenience, but not always restaurant-first workflows)
- **Local wholesale distributors** (reliable, broad catalog, less "farm-direct seasonal story")
- **Farm shops with delivery** (great quality, but fragmented ordering/invoices)
- **Aligro** (cash-and-carry control, but time cost + unpredictability)
- **Weekly markets** (quality + relationships, but time and limited consistency)

Customer actions

- They check:
  - product range (core vegetables, herbs, specialty seasonal items)
  - cut/pack format (restaurant-ready vs consumer pack sizes)
  - pricing structure (delivery fee + service fee vs subscription)
  - delivery slots and reliability

- They ask "proof questions":
  - "Who are the farms?"
  - "What's your cold-chain approach?"
  - "What happens if the farmer can't deliver?"

- They test the experience by building a sample cart.

What they think

- "Will this replace my current routine, or add another one?"
- "I can't manage multiple invoices and random delivery times."

Emotions

- **Curious → skeptical**
- They want confidence, not a hard sell.

Touchpoints

- Website/app catalog (must feel restaurant-focused)
- "How it works" page
- Seasonal availability view (what's good this week in Switzerland)
- Short call / voice note with ops coordinator
- Simple comparison sheet they can forward internally

Pain points + friction

- Trust gap: "New supplier risk"
- Product uncertainty: seasonal items change; chefs need predictability for menu planning
- "Hidden fees" fear

- Setup effort: onboarding farms vs onboarding restaurant—restaurant wants it to "just work"

Opportunities to delight

- **Menu planning support** (key differentiator)
  - "Chef list for next week: top seasonal Swiss items + suggested swaps"

- **One-invoice promise**
  - "No matter how many farms, you get one consolidated invoice"

- **Chef control over substitutions**
  - Toggle options: "No substitutes", "Chef-approved substitutes only", "Best match"

Key metrics to track

- Consideration → decision conversion rate (lead-to-first-order)
- Cart build rate (catalog engagement)
- Drop-off reasons (delivery time, product gap, minimum order, pricing confusion)
- Time from first contact to first order (days)

Recommended tools/tactics

- **Competitor comparison page (honest, Zürich-specific)**
  - "When to use Aligro vs when we save you time"
  - "How we differ from Farmy.ch for restaurant workflows"

- **Trust assets**
  - Farm verification checklist summary (photos, standards, packaging rules)
  - Delivery reliability statement (SLA-like, in plain language)

- **Sales enablement**
  - A short "trial order script" for ops coordinator focused on risk removal:
    - "Let's do one breakfast delivery for your top 6 items."

Stage 3 — Decision (they convert or hesitate)

Customer actions

- They decide whether to place a **first trial order**.
- They often start small:
  - herbs + salad leaves + 2–3 vegetables for tomorrow's service
- They choose a delivery slot and confirm invoice details.

What they think

- "If tomorrow's delivery is smooth, I'm in."
- "If there's any surprise, I go back to my distributor or Aligro."

Emotions

- **Hopeful but anxious**
- The perceived downside is high (service failure).

Touchpoints

- Signup / account creation (should be minimal)
- First order checkout
- Confirmation message (WhatsApp/email)
- "Delivery slot + what to expect" briefing
- Payment/invoicing setup

Pain points + friction (what almost stops them)

- Too many steps to create an account
- Unclear delivery cutoff time
- Lack of a human fallback ("Who do I call at 06:30 if something is wrong?")
- Unclear packaging (how it arrives, where to put crates, returns)

Opportunities to delight

- **Risk-free trial framing**
  - "First delivery: dedicated support, easy credits if something is off"

- **Chef-friendly confirmation**
  - A single message with:
    - items summary
    - delivery window
    - driver instructions field (back entrance, bell name)
    - support number

- **Predictability**
  - "Your slot is stable if you order consistently."

Key metrics to track

- Checkout conversion rate
- Account creation completion
- First-order average basket size
- Support contact rate pre-delivery (questions = friction signal)
- Delivery slot selection distribution (helps route planning in Zürich)

Recommended tools/tactics

- **Frictionless sign-up**
  - "Order first, finalize billing after" for pilot (with guardrails)

- **Human safety net**
  - A Zürich ops hotline for delivery mornings

- **Checkout clarity**
  - Transparent fees: delivery fee + service fee, shown early

- **Abandoned cart recovery**
  - WhatsApp follow-up: "Want me to place the order for you in 2 minutes?"

Stage 4 — Onboarding (first 7 days: retention is made or broken)

The first week is where you earn the right to become the default.

Customer actions (day-by-day reality)

- **Day 0 (first order placed):** confirms delivery instructions, shares receiving constraints
- **Day 1 (first delivery):** checks quality, weight/units, labeling, temperature, cleanliness
- **Day 2–3:** decides whether to place the second order
- **Day 4–7:** starts building a routine (standing order patterns)

What they think

- "Did this save me time, or create new work?"
- "Are the products consistent enough for my menu?"

Emotions

- **High sensitivity to errors**
- One bad delivery can reset trust to zero.

Touchpoints

- Delivery experience (the biggest moment)
  - crates, labeling, freshness, cleanliness
  - driver professionalism and punctuality

- Receiving + issue reporting flow (must be fast)
- First consolidated invoice
- Seasonal recommendation nudge for next order

Pain points + friction moments

- Missing items or wrong units (kg vs bunch)
- Inconsistent quality across farms
- Too much packaging waste, unclear crate returns
- Slow resolution when something is wrong
- Menu planning mismatch: item unavailable after chef planned around it

Opportunities to delight (specific "wow" moments)

- **Restaurant-ready labeling**
  - Clear label: farm, harvest date if available, quantity, storage tip

- **Ultra-fast issue resolution**
  - "Report in-app with photo → credit issued within hours"

- **Predictable receiving**
  - Driver texts 10 minutes before arrival (WhatsApp)

- **Chef time-saver**
  - "Reorder last order" + "favorite list"

- **Seasonal swap suggestions**
  - If an item is tight supply, suggest 2 chef-usable alternatives *before checkout*

Key metrics to track (first-week health)

- Time to second order (best predictor of retention)
- On-time delivery rate (Zürich routes)
- Fill rate (items delivered / items ordered)
- Issue rate per order (and resolution time)
- % of customers using "reorder" within 7 days
- Trial → subscription attach rate (CHF 299/month priority plan)

Recommended tools/tactics

- **Onboarding checklist (internal)**
  - Delivery instructions captured, preferred units, substitution rules, invoice details

- **First-week concierge**
  - Proactive message after first delivery: "Everything ok? Anything to adjust?"

- **Quality standardization**
  - Farm packaging standards + acceptance criteria

- **Simple feedback loop**
  - 1-question rating after each delivery: "Did this delivery make tomorrow easier?"

Stage 5 — Engagement (repeat use and habit building)

Engagement is about becoming part of the weekly rhythm in Zürich kitchens.

Customer actions

- Sets a routine:
  - order at a consistent time (e.g., after service)
  - uses repeat lists (core staples)

- Uses seasonal items for specials when confident.
- Shares access with sous-chef or purchasing assistant.

What they think

- "This is finally predictable."
- "I can spend my time on cooking, not sourcing."

Emotions

- **Relief → growing trust**
- Satisfaction becomes calmer, less fragile.

Touchpoints

- Weekly seasonal availability updates (Switzerland-focused)
- Order reminders before cutoff time
- Stable delivery window
- Consolidated invoice cadence (weekly or monthly)

- Support that feels like "ops partner", not a call center

Pain points + friction

- Stockouts during peak seasons or sudden weather impacts
- Too many notifications (chefs hate noise)
- Price perception if a competitor promo appears
- Operational slips (late delivery during Zürich traffic, parking constraints)

Opportunities to delight

- **"Menu helper" that respects chef reality**
  - 5 seasonal items + best uses + storage tips in 30 seconds

- **Smart repeat ordering**
  - "Your usual staples list is ready—adjust quantities in 1 tap"

- **Delivery precision**
  - Reliable window + clear escalation path if late

- **Proactive substitutions**
  - Notify before cutoff: "Item tight—choose swap now to avoid morning surprises"

Key metrics to track

- Orders per week per restaurant
- Average basket size and gross margin contribution
- Repeat rate (weekly and monthly)
- Share of wallet proxy (how many categories they buy from you)
- Notification engagement (opens, click-through, opt-outs)
- Customer support tickets per 10 orders

Recommended tools/tactics

- **Cohort tracking**
  - Track Zürich customers by "week of first order" to see retention trends

- **Personalized ordering surfaces**
  - Favorites, last order, standing order templates

- **Ops-driven reliability**
  - Route optimization, delivery slot management, cold-chain audits

- **Lightweight account management**
  - For high-value restaurants: monthly check-in, seasonal planning chat

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Stage 6 — Loyalty (they become your advocate)

Loyalty is when you're no longer "a supplier." You're the default path to fresh Swiss produce.

Customer actions

- Stops price-shopping for core produce.
- Recommends you to other chefs in Zürich.

- Joins the subscription (CHF 299/month priority delivery) if it protects their routine.
- Uses you to support restaurant storytelling ("Swiss seasonal, local farms").

What they think

- "This makes my kitchen run smoother."
- "It's worth paying for reliability."

Emotions

- **Confidence and pride**
- Pride matters: chefs like being known for sourcing well.

Touchpoints

- Loyalty / referral program
- Seasonal "chef picks" drops
- Occasional farm spotlight (short, authentic, not marketing-heavy)
- Quarterly reliability report (simple: on-time %, fill rate, issue resolution time)

Pain points + friction

- Loyalty collapses fast if reliability drops for multiple deliveries
- If invoicing becomes messy or disputes drag on, trust erodes
- If product quality varies across farms, they blame the platform (not the farm)

Opportunities to delight

- **Make them look good**
  - Provide a small "origin note" they can use on the menu (optional)

- **VIP stability**
  - Prioritized delivery window for loyal accounts

- **Invite-only tastings**
  - Zürich-based seasonal tasting box for chefs (once per season)

Key metrics to track

- Net revenue retention (NRR)
- Referral rate (invites sent, referrals converted)
- Subscription penetration among loyal cohort
- NPS (but interpret carefully—B2B NPS can be noisy; pair with behavior metrics)
- Churn rate of top 20% accounts

Recommended tools/tactics

- **Referral trigger moments**
  - After 10 successful deliveries, ask for one referral (not earlier)

- **Tiered loyalty**
  - Benefits tied to reliability needs (stable slot, early access to limited seasonal items)

- **Advocacy assets**
  - Simple farm origin cards, seasonal produce notes, kitchen-friendly

Stage 7 — Churn (why they leave + early warning signals)

Churn in Zürich will be driven less by "features" and more by **operational trust**.

Customer actions

- Reduces order size, then pauses ordering.
- Returns to:
    - their **local wholesale distributor** for predictability
    - **Aligro** for control
    - **farm shops with delivery** for specific items
    - **Farmy.ch** for convenience on non-critical items
- Stops responding to messages, ignores reminders.

What they think

- "This is not reliable enough for my service."
- "The savings in time aren't worth the risk anymore."
- "When something went wrong, it took too long to fix."

Emotions

- **Disappointment → irritation**
- They often don't complain; they just quietly switch back.

Touchpoints

- Support interactions (this is where the relationship is tested)
- Delivery exception handling (late, missing, quality issue)
- Billing disputes or unclear credits

Pain points that cause churn (most common)

- Two or more "bad mornings" in a short period (late/missing/quality)
- Repeated stockouts of staples
- Poor substitution handling (chef feels out of control)
- Slow or unfair issue resolution
- Delivery slot instability (arrival time drifts)

Early warning signals (catch these fast)

- Order frequency drops (e.g., weekly → every other week)
- Basket shrinks to "test items only"
- More complaints about the same category (e.g., leafy greens quality)
- Higher last-minute cancellations
- Increased support contacts per order
- Lower engagement with reorder/favorites (they stop building habit)

Opportunities to delight (win-back done right)

- **Own the problem quickly**
  - "We missed. Here's what we changed in Zürich routes."

- **Make it painless to return**
  - "Come back with a dedicated stable slot for 2 weeks."

- **Fix the root cause**
  - If it's one farm's inconsistency, swap suppliers or tighten standards.

- **Chef control**
  - Offer stricter substitution rules for that account.

Key metrics to track

- Churn rate (logo churn and revenue churn)
- Time-to-detect churn risk (days from first signal)
- Recovery rate (paused → active again)
- Root cause categories (ops, quality, pricing, invoicing)
- Delivery exception rate by route and time window

Recommended tools/tactics

- **Churn risk scoring**
  - Simple rules-based model at first (frequency + issues + basket shrink)

- **Post-incident playbook**
  - Clear actions after a failure: proactive call, credit, process fix, follow-up

- **Operational dashboards (Zürich first)**
  - On-time %, fill rate, exception heatmap by postcode/slot

- **Save offers that match the real problem**
  - Not discounts first—offer reliability and control (stable slot, stricter substitutions)

Emotional curve (how it feels across the journey)

If you plot the chef's emotional state from 1 (bad) to 10 (great), it usually looks like this:

- **Awareness (4/10):** pain is high; they are stressed and annoyed by sourcing problems
- **Consideration (5/10):** hope rises, but skepticism stays
- **Decision (6/10):** optimism, mixed with anxiety about tomorrow morning
- **Onboarding (7/10):** big jump if the first delivery is flawless; big drop if not
- **Engagement (8/10):** calm confidence as routine forms
- **Loyalty (9/10):** pride + trust; they advocate
- **Churn (2/10):** disappointment and frustration after repeated failures
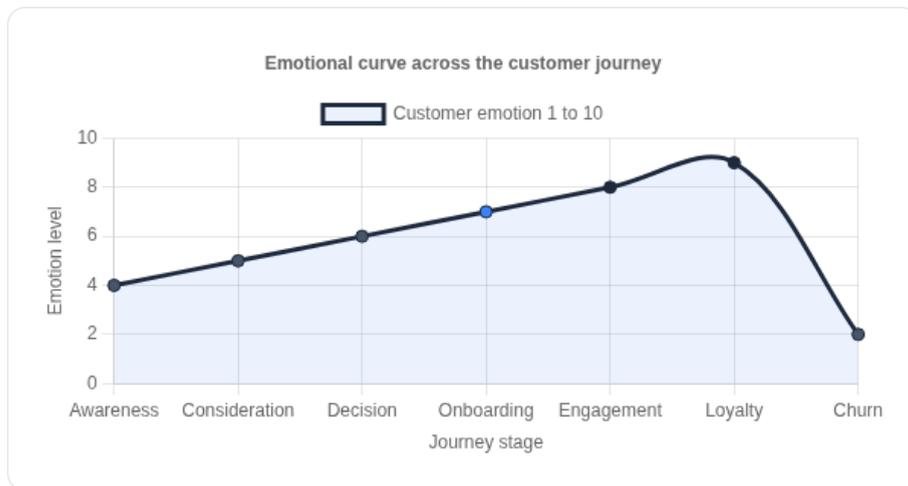
Figure 2: Emotional curve across stages, showing how trust and satisfaction rise with reliable next-morning deliveries in Zürich and collapse quickly when reliability breaks.

Financial Modeling & Unit Economics

This chapter turns the Zürich-first plan into a simple, numbers-driven model you can use to decide: **does each restaurant make money for us, how fast, and how much cash do we need to survive the ramp?**

1) Key assumptions (Zürich launch first, 30–40 km radius)

These are the "dials" that drive the whole model. I'm making them explicit so you can challenge or replace them.

1.1 Assumptions table (Base vs Best vs Worst)

ASSUMPTION	BASE CASE	BEST CASE	WORST CASE	WHY THIS IS REASONABLE FOR ZÜRICH + 30–40 KM
Average order value per delivery (CHF)	300	350	260	Independent bistros + mid-sized restaurants often place produce-heavy top-up orders in this range when they want next-morning reliability (not full wholesale replenishment).
Orders per restaurant per week	3	4	2	"Next-morning" fits frequent replenishment; but many kitchens still do partial self-sourcing (e.g., Aligro, markets).
Commission rate on basket	8%	9%	7%	Your target range is 6–10%; 8% is a middle that should still be defendable vs wholesalers if service quality is high.
Delivery fee charged to restaurant (CHF / drop)	10	12	10	Matches stated willingness (CHF 8–15). Best case assumes you price for priority slots.
Courier partner payout (CHF / drop)	8	7	9	Zürich-area last-mile is expensive; best case assumes route density improves and you negotiate better rates.
Platform delivery margin (CHF / drop)	2	5	1	Delivery fee minus courier payout. This is a key lever and a key risk.
Priority delivery subscription (CHF / month)	299	299	299	Matches your intended plan (CHF 299/month).
Subscription attach rate (share of restaurants)	20%	30%	10%	Not every restaurant values "priority" equally; early adopters likely do.
Card/payment + invoicing cost (approx. CHF / order)	2.8	2.6	3.2	If you collect payments and pay farms, payment rails + invoicing/admin costs scale with volume.
Cold-chain + packaging handling (CHF / order)	1.3	1.0	1.8	Crates, labels, ice packs, reverse logistics; improves with standardization.
Ops & support variable time (CHF / order)	0.9	0.7	1.2	Exceptions, substitutions, missed items, chef calls.
Refunds/spoilage/disputes reserve (CHF / order)	1.0	0.6	1.8	If a crate is late or quality is off, restaurants will push back hard (and will revert to Aligro/wholesalers fast).
Effective gross profit lifetime (months)	30	40	18	Base assumes service becomes "habit-forming" once reliable; worst case assumes churn stays high due to ops issues or price pressure.
CAC blended (CHF per restaurant acquired)	880	650	1,250	Early CAC is often high in Switzerland unless referrals/partners kick in.
Expansion timing to Lausanne + Geneva	Year 2	Earlier Year 2	Late Year 2 / Year 3	Depends on whether Zürich routes are smooth and farm supply is dependable.

2) Unit economics (what happens per delivery and per restaurant)

2.1 Unit economics per delivery (Base case)

One "unit" = one next-morning delivery drop to a restaurant in Zürich + nearby canton.

PER DELIVERY (CHF)	AMOUNT	NOTES
Revenue: commission	24.0	8% × CHF 300 basket
Revenue: delivery margin	2.0	CHF 10 fee – CHF 8 courier payout
Total revenue per delivery	**26.0**	Commission + delivery margin
Payment + invoicing cost	(2.8)	Scales with volume/GMV and payment method mix
Cold-chain + packaging handling	(1.3)	Crates + handling + reverse logistics
Ops & support variable	(0.9)	Exceptions, substitutions, customer support time
Refunds/spoilage reserve	(1.0)	A "quality insurance" buffer
Total variable cost per delivery	**(6.0)**	Sum of variable items above (excluding courier payout, which is already netted in delivery margin)
Gross profit per delivery	**20.0**	CHF 26.0 – CHF 6.0
Gross margin % (per delivery)	**76.9%**	High because courier is treated as pass-through except for the margin you keep

Important: If you ever have to *subsidize* delivery (pay couriers more than the fee you charge), gross margin can collapse quickly. This is a major "watch item" in Zürich because costs are high.

2.2 Unit economics per restaurant per month (Base case)

Assume **3 orders/week ≈ 12 orders/month**.

PER RESTAURANT-MONTH (CHF)	AMOUNT	HOW IT'S COMPUTED
Commission revenue	288	12 × 24
Delivery margin revenue	24	12 × 2
Subscription revenue (expected value)	59.8	20% × 299
Total revenue per restaurant-month	**371.8 (~372)**	Sum above
Variable costs (excluding courier pass-through)	(72.0)	12 × 6.0
Gross profit per restaurant-month	**299.8 (~300)**	371.8 – 72.0

Reality check vs competitors:

- If your service is not clearly better than "status quo" options (local wholesalers + Aligro runs + farm shops with delivery), a restaurant will not keep paying an 8% commission *and* a delivery fee for long. Your unit economics

assume you earn the right to be a weekly habit.

2.3 CAC (Customer Acquisition Cost) by channel (Zürich-first)

CAC = **what it costs you to sign up one paying restaurant** (sales time + marketing + onboarding effort).

CHANNEL (ZÜRICH-FIRST)	WHAT YOU DO	CAC (CHF)	WHAT'S INSIDE THE CAC
Outbound direct sales	Visit kitchens, call chefs, tastings, menu-fit pitch	1,200	Time-heavy; travel + relationship building
Chef referrals	Existing chef introduces you	400	Referral credit + minimal sales time
Partnerships	Farm associations, chef groups, culinary schools, local networks	700	Partner fees + content + a bit of sales time
Paid ads	Search/social targeted to Zürich chefs/purchasers	1,000	Click cost + landing page + sales follow-up
Events	Zürich food events, tastings, supplier showcases	1,500	Booth + samples + time (high intent, high cost)
Blended (typical mix)	40% outbound, 25% referrals, 20% partners, 10% ads, 5% events	**~880**	Weighted average

Why blended CAC matters: if referrals/partners don't grow, you'll be stuck in the expensive channels and the model gets fragile.

2.4 LTV (Lifetime Value) calculation (Base case)

LTV = **total gross profit you expect from one restaurant over its "life" with you**.

Base case inputs

- Gross profit per restaurant-month: **~CHF 300**
- Effective lifetime: **30 months**

Base case LTV

- **LTV = 300 × 30 = CHF 9,000**

To keep this honest, here's the same math across scenarios:

SCENARIO	GROSS PROFIT / RESTAURANT-MONTH	LIFETIME MONTHS	LTV (CHF)
Best	370	40	14,800
Base	300	30	9,000
Worst	210	18	3,780

2.5 LTV:CAC ratio and payback period (by channel)

Two quick tests:

- **LTV:CAC**: how many CHF you get back for each CHF spent acquiring a restaurant (bigger is better)
- **Payback**: how many months until the gross profit has "paid back" the CAC (smaller is better)

Using **Base LTV = CHF 9,000** and **gross profit/month = CHF 300**:

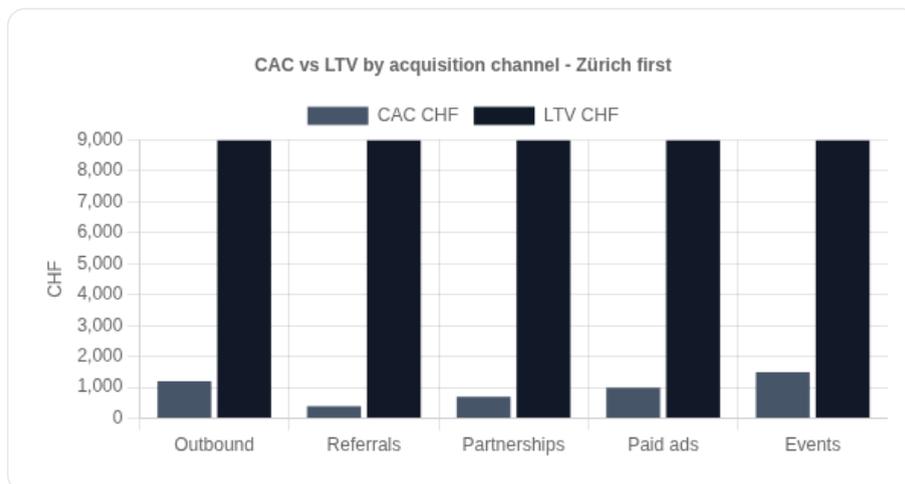| CHANNEL	CAC (CHF)	LTV (CHF)	LTV:CAC	PAYBACK (MONTHS)
Outbound direct sales	1,200	9,000	7.5×	4.0
Chef referrals	400	9,000	22.5×	1.3
Partnerships	700	9,000	12.9×	2.3
Paid ads	1,000	9,000	9.0×	3.3
Events	1,500	9,000	6.0×	5.0
Blended	**880**	**9,000**	**10.2×**	**2.9**

Figure 1: CAC compared to LTV across channels; the gap visually represents how much "room" you have to spend on acquisition.

2.6 Gross margin vs contribution margin (what really funds growth)

- **Gross margin** answers: *after direct variable costs, is the business healthy per order / per restaurant?*
- **Contribution margin** answers: *after variable costs, how much money is left to pay fixed costs (team, tools, rent) and still grow?*

In this model, the key "engine number" is:

- **Gross profit per restaurant-month (base): ~CHF 300**

So you can translate fixed costs into "restaurants needed to cover them" very simply:

- If fixed monthly costs are CHF 30,000 → you need about **30,000 / 300 = 100 active restaurants** to break even that month.

That's the heartbeat metric for Zürich: **active restaurants and orders per restaurant**.

3) 3-year financial projection (monthly Year 1, quarterly Years 2–3)

3.1 Growth plan assumptions (restaurants)

Base case active restaurants (Zürich first, then expand):

- Year 1: start ~10, end ~95 (Zürich + nearby canton)
- Year 2: ramp with expansion into Lausanne + Geneva, end ~260
- Year 3: scale across the three city hubs, end ~520

These are "active ordering" restaurants (not just signups).

3.2 Revenue model (Base case)

A) Year 1 — monthly revenue (Base case)

Assume revenue per active restaurant-month stays ~**CHF 372** (from Section 2.2).

YEAR 1 MONTH	ACTIVE RESTAURANTS	REVENUE (CHF)
1	10	3,720
2	15	5,580
3	20	7,440
4	25	9,300
5	30	11,160
6	35	13,020
7	45	16,740
8	55	20,460
9	65	24,180
10	75	27,900
11	85	31,620
12	95	35,340
Total Year 1	—	**206,460**

B) Years 2–3 — quarterly revenue (Base case)

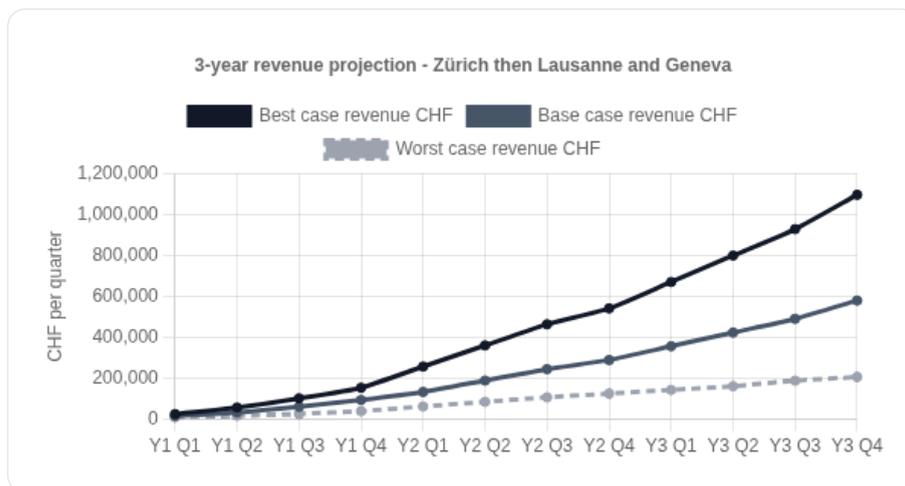| QUARTER	AVG ACTIVE RESTAURANTS	REVENUE (CHF)
Year 2 Q1	120	133,920
Year 2 Q2	170	189,720
Year 2 Q3	220	245,520
Year 2 Q4	260	290,160
Total Year 2	—	**859,320**
Year 3 Q1	320	357,120
Year 3 Q2	380	424,080
Year 3 Q3	440	491,040
Year 3 Q4	520	580,320
Total Year 3	—	**1,852,560**

Figure 2: Quarterly revenue trajectory across best, base, and worst cases over three years.

3.3 Cost structure (fixed vs variable)

To keep it simple, split costs into:

- **Variable costs**: move up/down with orders (payments, packaging handling, variable ops time, quality issues)
- **Fixed costs**: team, tools, hubs, insurance, and baseline marketing

A) Variable cost model (Base case)

- Variable cost per delivery (excluding courier pass-through already netted in delivery margin): **CHF 6.0**
- Deliveries per restaurant-month: **12**
- Variable costs per restaurant-month: **~CHF 72**

So variable costs track active restaurants closely.

B) Fixed cost build (Base case)

This is a "lean team" that matches the stated resource plan, then grows as you add Lausanne + Geneva.

YEAR	FIXED COST LEVEL (ROUGH AVERAGE)	WHAT'S DRIVING IT
Year 1	~CHF 12k/month	Part-time ops, contractors for app/dashboard, basic tools, pilot marketing
Year 2	~CHF 38k/month	Add Romandie ops coverage, more customer support, more structured marketing
Year 3	~CHF 75k/month	Multi-hub ops, light sales team, stronger customer success + QA processes

C) Cost structure breakdown example (Year 2, Base case)

This shows where the money goes once you're operating Zürich + launching Lausanne/Geneva.

| COST CATEGORY (YEAR 2)	CHF	FIXED OR VARIABLE
Courier payouts (pass-through economics still drive ops reality)	221,000	Variable
Payment + invoicing costs	83,000	Variable
Cold-chain + packaging handling	41,000	Variable
Ops variable time per order	29,000	Variable
People - ops and support and customer success	260,000	Fixed
Product and engineering	80,000	Fixed
Marketing	60,000	Fixed
Micro-hubs and storage	30,000	Fixed
Admin and insurance and legal	26,000	Fixed
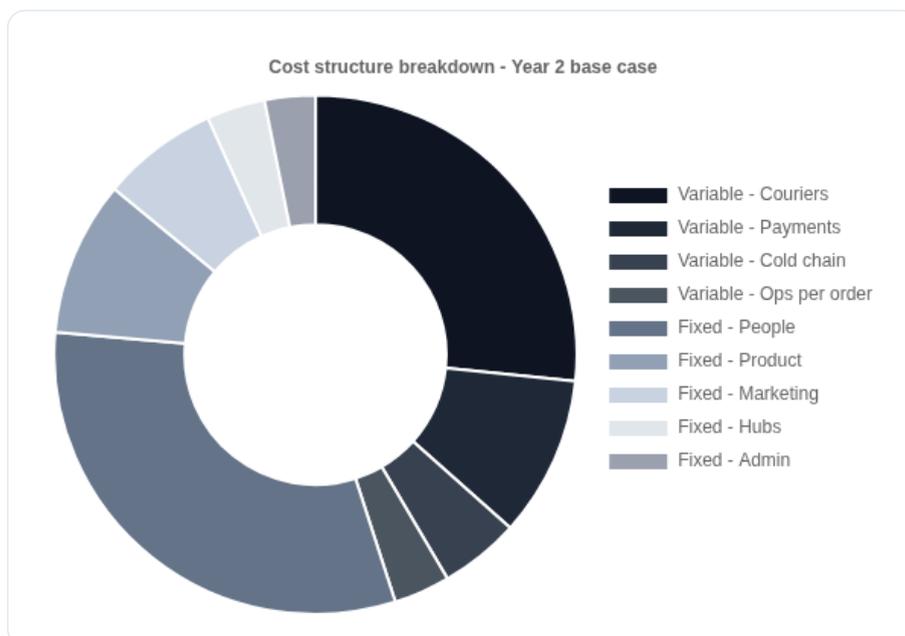
Figure 3: Cost structure showing variable costs tied to orders and fixed costs tied to the team and hub setup.

3.4 3-year P&L summary (Base case)

Using:

- Revenue per restaurant-month: **~CHF 372**
- Variable cost per restaurant-month: **~CHF 72**
- Gross profit per restaurant-month: **~CHF 300**

(CHF)	YEAR 1	YEAR 2	YEAR 3
Revenue	206,460	859,320	1,852,560
Variable costs	(39,960)	(166,320)	(358,560)
Gross profit	**166,500**	**693,000**	**1,494,000**
Fixed costs (team, hubs, tools, baseline marketing)	(196,878)	(677,760)	(1,378,080)
Operating profit / loss	**(30,378)**	**15,240**	**115,920**

Interpretation: In the base case, the business becomes meaningfully profitable only once you have enough restaurants per hub that routes are dense and the fixed team is fully utilized.

3.5 Break-even analysis (when and at what volume)

Break-even is easiest to see in "restaurants," because revenue and variable costs scale with active restaurants.

Base case gross profit per restaurant-month: ~CHF 300

A) Break-even restaurant count at different cost levels

MONTHLY FIXED COST LEVEL	RESTAURANTS NEEDED TO BREAK EVEN THAT MONTH
CHF 12,000 (lean Zürich phase)	40
CHF 25,000 (more support + more marketing)	84
CHF 38,000 (multi-city buildout starting)	127
CHF 75,000 (scaled multi-hub org)	250

B) "When" in the base ramp

- **Monthly break-even in Year 1:** around **Month 8–10** (once you're consistently above ~55–75 active restaurants in Zürich and pilot marketing spend drops).
- **Structural break-even during expansion:** you'll dip again if you add fixed team costs in Lausanne/Geneva before restaurant density catches up. That's normal, but it must be planned and funded.

3.6 Cash flow forecast and burn rate

Cash flow matters because you can have a good long-term model and still die from running out of cash during the ramp.

A) Year 1 monthly cash flow (Base case, simplified)

Assumptions:

- Fixed costs include pilot marketing in the first half.
- One-time cold-chain crate investment: **CHF 15k in Month 1**.
- Ignore working-capital swings for simplicity (see note below).

MONTH	GROSS PROFIT (CHF)	FIXED COSTS (CHF)	CAPEX CRATES (CHF)	NET CASH FLOW (CHF)
1	3,000	(14,133)	(15,000)	(26,133)
2	4,500	(14,133)	0	(9,633)
3	6,000	(14,133)	0	(8,133)
4	7,500	(14,133)	0	(6,633)
5	9,000	(14,133)	0	(5,133)
6	10,500	(14,133)	0	(3,633)
7	13,500	(10,800)	0	2,700
8	16,500	(10,800)	0	5,700
9	19,500	(10,800)	0	8,700
10	22,500	(8,800)	0	13,700
11	25,500	(8,800)	0	16,700
12	28,500	(8,800)	0	19,700

Peak cumulative cash needed (Year 1): roughly **CHF 60k–80k** in this base plan (because early months are negative and crates require upfront cash).

Working capital note (very important in Switzerland):
If restaurants insist on **invoice terms (Net 30)** but farms expect faster payout, you'll need extra cash to bridge that gap. This can easily add **tens of thousands of CHF** once volume grows. The safest early path is **card / direct debit** for restaurants, at least during Zürich validation.

B) Year 2–3 burn rate (Base case, quarterly view)

QUARTER	NET CASH FLOW (APPROX.)	WHAT IT MEANS
Year 2 Q1	Negative	Expansion costs land before Lausanne/Geneva volume fully ramps
Year 2 Q2	Near break-even	Routes improving and subscription attach starts to matter
Year 2 Q3–Q4	Positive	Density improves; fixed team better utilized
Year 3	Positive overall	Scale benefits show up if delivery margins and churn hold

3.7 Sensitivity analysis (what moves the model most)

This shows how one change affects **monthly gross profit per restaurant** (base starts at ~CHF 300/month).

LEVER	CHANGE	APPROX IMPACT ON GROSS PROFIT PER RESTAURANT-MONTH	WHY IT MATTERS IN ZÜRICH
Orders/week	+1 order/week	+~CHF 80	More frequent ordering is the fastest path to route density and profit.
Average basket size	+CHF 50 per order	+~CHF 40–50	Commission scales with basket; chefs buying more via you is a win.
Commission rate	+1 percentage point	+~CHF 30–40	Small changes compound; but price pressure vs wholesalers is real.
Courier payout	+CHF 1 per drop	−~CHF 12	If you can't keep courier costs under control, delivery margin disappears.
Delivery fee	+CHF 1 per drop	+~CHF 12	Often easier than raising commission, if you tie it to "priority slot" value.
Subscription attach	+10 percentage points	+~CHF 30	Subscriptions stabilize revenue and help fund service quality.
Customer lifetime	+6 months	+~CHF 1,800 LTV	Reliability drives habit; unreliability sends chefs back to Aligro/wholesalers quickly.

4) Benchmark comparison (how these metrics stack up)

These are practical "health targets" commonly used in high-growth businesses. Exact numbers vary, but the ranges are useful.

4.1 LTV:CAC

- **Good:** 3× to 5×
- **Strong:** 5× to 10×
- **Base case here:** ~10× blended (very strong)

But: this only stays true if churn stays low and delivery margin doesn't get squeezed.

4.2 Payback period

- **Good for many B2B models:** under 12 months
- **Better (especially if cash is tight):** under 6 months
- **Base case here:** ~3 months blended

Again, payback looks great *if* the gross profit per restaurant-month is real and stable.

4.3 Gross margin

- Pure software businesses often target very high gross margins.
- Businesses that touch logistics/ops are typically lower.

This model's gross margin can look high because courier costs are treated as mostly pass-through with a small margin kept. That's okay, but you must be strict about:

- pricing delivery correctly
- preventing exceptions (late crates, missing items, substitutions chaos)

4.4 Take rate (commission)

- Your 6–10% range is plausible for a specialized "verified farms + next-morning + consolidated invoice" service.

- Price pressure will come from:
  - wholesalers who can bundle many categories
  - chefs doing self-pickup runs (Aligro)
  - consumer-ish players like Farmy.ch shaping expectations around delivery convenience

Your defense is operational: **predictable slots, restaurant-ready packaging, and fewer kitchen headaches.**

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5) Red flags (numbers that should worry you and trigger action)

These are the "tripwires" I'd put on a weekly dashboard during the Zürich pilot.

5.1 Unit economics red flags

1. **Delivery margin ≤ CHF 0 per drop**

   - Meaning: you're subsidizing logistics.
   - Action: raise delivery fees, renegotiate courier rates, enforce minimum order sizes, or batch delivery windows tighter.

2. **Orders per restaurant < 2/week after month 2–3**

   - Meaning: you're not becoming a habit; acquisition spend won't pay back fast enough.
   - Action: improve seasonal planning tools, subscription incentives, and reorder flows.

3. **Subscription attach rate < 10% after you have 40+ restaurants**

   - Meaning: the "priority" value prop isn't clear or isn't trusted.
   - Action: tighten SLA (on-time windows), make benefits concrete (first-slot guarantee, emergency add-ons).

4. **Refunds/disputes > 1% of orders** (or rising)

   - Meaning: quality control / packing standards / cold-chain process is breaking.
   - Action: farmer packaging standards, receiving checks, photo proof, stricter substitution rules.

5.2 Growth economics red flags

5. **CAC drifting up while conversion doesn't improve**

   - Meaning: outbound is saturating and referrals/partners aren't growing.
   - Action: build referral loops, lock in partnerships, focus on a few chef communities.

6. **Payback > 6 months** in Zürich

   - Meaning: you're taking too long to recover acquisition spend.
   - Action: reduce CAC (more referrals), increase gross profit (delivery pricing, subscription), or cut fixed costs.

5.3 Cash red flags

7. **Restaurants demand Net 30 while farms demand fast payout** and you accept it too early

   - Meaning: you'll run into a cash crunch even if profits look fine on paper.
   - Action: card/direct debit first, invoice later for trusted accounts; consider factoring only if needed.

8. **Expanding to Lausanne/Geneva before Zürich is consistently smooth**

   ○ Meaning: you multiply operational complexity and churn risk.

   ○ Action: expansion gate should be metrics-based: on-time %, dispute %, orders/restaurant/week, courier cost/drop stability.

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6) The "VP of Finance" takeaway (what to watch weekly in Zürich)

If I had to reduce this chapter to a small operating scorecard for the pilot, it would be:

- Active restaurants (ordering, not signed up)
- Orders per restaurant per week
- Delivery margin per drop (fee minus courier payout)
- Subscription attach rate
- Dispute/refund rate
- CAC by channel (especially referrals share)
- Cash runway (including any invoice-term gap)

Because in Zürich, the whole model works when **density + reliability** turn you from "nice idea" into "default habit" for chefs.

Chapter 10 — Risk Assessment & Scenario Planning

1) Executive risk view (Zürich launch first)

This business succeeds or fails on one promise: **chefs in Zürich can place an order today and get restaurant-ready Swiss produce tomorrow morning, reliably**. That means the biggest risks are the ones that break trust fast:

- **Reliability risks** (late deliveries, missing items, quality issues)
- **Food handling risks** (cold chain and contamination)
- **Economics risks** (thin margins, pricing pressure, poor route density)
- **Compliance risks** (food transport rules, invoicing and VAT, data protection)
- **Reputation risks** (a few loud bad experiences can spread quickly in the Zürich restaurant scene)

To manage this like an executive risk program, we'll use:

- A **15-risk register** with probability, impact, early warning indicators, mitigation, and contingency plans
- A **prioritized risk matrix** (probability vs impact)
- A **top-10 risk ranking** (by risk score)
- Four **scenarios** with revenue impact, timeline impact, and the strategic response

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2) Risk identification (15 risks) — Zürich-first risk register

Rating scale

- **Probability (1–5):** 1 rare, 3 possible, 5 very likely

- **Impact (1–5):** 1 minor, 3 serious, 5 existential
- **Risk score:** Probability × Impact (max 25)

> Practical note: Zürich is compact but operationally tricky (tight delivery windows, traffic rules, parking constraints, high service expectations). That pushes operational reliability risks upward versus a less demanding city.

Risk register (prioritized by score, highest first)

ID	RISK	CATEGORY	PROB	IMPACT	SCORE	EARLY WARNING INDICATORS (WHAT YOU'LL SEE FIRST)	MITIGATION STRATEGY (REDUCE THE CHANCE)	CONTINGENCY PLAN (IF IT HAPPENS ANYWAY)
R1	Restaurant churn	Market	4	4	16	Repeat customers drop week-to-week; chefs stop reordering after 1–2 problems; more "I'll go back to my wholesaler" comments; lower conversion after first order	Make reliability the KPI: on-time %, fill rate, quality claims. Set "chef-grade" SLAs for Zürich AM deliveries. Rapid account management for top restaurants. Tight feedback loop after each delivery	If churn spikes: pause acquisition spend, focus on top 20 accounts, run "service recovery week" with credits + founder calls; temporarily narrow assortment to most reliable items until operations stabilize
R6	Courier capacity and failures	Operational	4	4	16	Rising late deliveries; couriers cancel last-minute; route coverage gaps in Zürich early morning; more delivery exceptions (no parking, no access)	Maintain 2–3 courier partners plus a backup on-call option. Standardize handoff, route constraints, access notes. Incentives for early AM reliability. Build route density before expanding areas	If partners fail: switch to reduced delivery zones, adjust cut-off times, use "must-deliver" list for premium customers, and communicate proactively with chefs before 6:00 AM
R8	Unit economics erosion	Financial	4	4	16	Delivery cost per stop rises; average basket size drops; more small orders; more refunds/credits; commission not covering ops	Enforce minimum order thresholds by zone/time. Encourage subscription plan for predictable routes. Bundle items and promote "chef packs." Track contribution margin per route daily	If margins collapse: increase minimums, tighten delivery days, remove low-margin SKUs, renegotiate courier rates, and shift to fewer but denser routes in Zürich city core

ID	RISK	CATEGORY	PROB	IMPACT	SCORE	EARLY WARNING INDICATORS (WHAT YOU'LL SEE FIRST)	MITIGATION STRATEGY (REDUCE THE CHANCE)	CONTINGENCY PLAN (IF IT HAPPENS ANYWAY)
R14	Late delivery backlash	Reputational	4	4	16	Angry calls from kitchens pre-service; negative WhatsApp group chatter among chefs; sudden cancellations; more "never again" messages	Design "no surprises" operations: earlier picking, buffer time, proof-of-delivery, live ETA. Priority lanes for high-value accounts and the CHF 299 plan	If backlash hits: immediate credits + personal outreach; publish a clear reliability plan; temporarily cap new signups until on-time performance returns above target
R5	Cold chain failure	Operational	3	5	15	Temperature logs missing or off-range; condensation in crates; more spoilage claims; specific items (leafy greens, berries) show higher complaint rates	Use insulated crates, gel packs, clear packing SOPs. Require farms to pre-cool where appropriate. Temperature spot checks at handoff. Train couriers on "keep closed" discipline	If failure occurs: recall affected deliveries, refund fast, pause sensitive SKUs for 1–2 weeks, switch to stricter packaging rules, and re-audit courier and farm handling
R13	Food safety incident	Reputational	3	5	15	Multiple restaurants report illness concerns; unusual smell/appearance complaints; social posts tagging the service; sudden demand for traceability	Strict farm verification and lot tracking. "Restaurant-ready" standards: cleanliness, handling, traceability. Clear rejection rules at receiving	If incident happens: immediate stop-ship from the suspected source, cooperate with authorities, communicate facts quickly to restaurants, provide traceability reports, and run third-party safety review
R2	Competitor price pressure	Market	3	4	12	Restaurants ask for discounts; wholesalers match offers; Farmy.ch or a local wholesaler promotes "B2B next-day"	Compete on "chef value," not cheapest: reliability, consolidated invoicing, predictable slots, seasonal menu	If price war escalates: introduce a limited "core basket" priced aggressively, keep premium on the rest; offer time-bound

ID	RISK	CATEGORY	PROB	IMPACT	SCORE	EARLY WARNING INDICATORS (WHAT YOU'LL SEE FIRST)	MITIGATION STRATEGY (REDUCE THE CHANCE)	CONTINGENCY PLAN (IF IT HAPPENS ANYWAY)
						pricing; higher price objections	planning. Lock in key accounts with the CHF 299 plan and service guarantees	retention offers; focus on segments that value service over lowest price
R4	Farmer supply shortfall	Operational	3	4	12	Items frequently unavailable; last-minute substitutions rise; farms miss cutoffs; weather impacts supply in Zürich hinterland	Diversify farms within the 30–40 km ring. Set clear availability publishing rules. Seasonal planning with farms 2–4 weeks ahead. Backup supplier list for key items	If shortages hit: auto-substitute with chef approval rules, adjust menus and recommendations, communicate availability early, and reduce catalog to reliable seasonal items
R7	Cash flow gap	Financial	4	3	12	Restaurants request long payment terms; late payments increase; you pay farms/couriers faster than you collect; bank balance tight before pilot ends	Tight invoicing cadence, credit checks for new accounts, deposit/weekly billing for risky accounts, incentives for direct debit. Keep a cash buffer sized to 6–8 weeks of ops	If cash crunch: pause farm onboarding, renegotiate payment timing, raise bridge funding, require prepay for some restaurants, and cut marketing until receivables stabilize
R10	Food transport compliance gaps	Regulatory	3	4	12	Missing documentation; inconsistent temperature records; complaints about handling; courier partners not aligned with food standards	Create a simple compliance pack: handling SOP, cleaning schedule, temperature logging rules, traceability. Contractual requirements for couriers and farms	If compliance issue arises: halt affected routes, retrain and re-certify partners, add audits, and document corrective actions before resuming

ID	RISK	CATEGORY	PROB	IMPACT	SCORE	EARLY WARNING INDICATORS (WHAT YOU'LL SEE FIRST)	MITIGATION STRATEGY (REDUCE THE CHANCE)	CONTINGENCY PLAN (IF IT HAPPENS ANYWAY)
R3	Seasonal demand dip	Market	3	3	9	Summer holidays reduce covers; winter storms disrupt ordering; weekly order patterns become volatile	Build forecasting by week and event calendar. Push "seasonal planning" upsells. Expand into stable segments (canteens, caterers) within Zürich region	If demand drops: reduce delivery days/zones, focus on best routes, offer seasonal bundles to lift basket size, and use part-time staffing to flex
R11	VAT and invoicing errors	Regulatory	3	3	9	Restaurants dispute invoices; credit notes pile up; farms complain about payouts; accounting reconciliation slows	Standardize SKU tax treatment and invoice templates. Test with 10 pilot restaurants. Tight reconciliation process and monthly audits	If errors spike: freeze complex promos, revert to simpler pricing, issue corrected invoices quickly, and add temporary finance support
R15	Farmer relationship conflict	Reputational	3	3	9	Farms complain about fees or standards; negative local community chatter; farms threaten to leave; inconsistent packaging adoption	Fair, transparent terms. Clear standards with support (training, packaging guidance). Fast payout policies. Highlight farms in marketing fairly	If conflict escalates: renegotiate terms for key farms, introduce a farmer advisory group, pause onboarding fees temporarily, and secure replacement supply
R9	Funding shortfall	Financial	3	4	12	Pilot KPIs not met by month 2; investors hesitate; CAC higher than expected; runway < 3 months	Stage-gate spending (pilot → launch). Keep tech lean. Track metrics weekly: active restaurants, order	If funding fails: extend pilot with paid commitments, reduce scope to Zürich core, pivot to "ordering + invoicing" first (less logistics

ID	RISK	CATEGORY	PROB	IMPACT	SCORE	EARLY WARNING INDICATORS (WHAT YOU'LL SEE FIRST)	MITIGATION STRATEGY (REDUCE THE CHANCE)	CONTINGENCY PLAN (IF IT HAPPENS ANYWAY)
							frequency, gross margin per route	risk), or partner with an established distributor/courier
R12	Courier labor classification risk	Regulatory	2	4	8	Partner couriers face legal scrutiny; insurance gaps; sudden cost increases; contract terms challenged	Prefer established courier firms with compliant employment setup. Clear contracts and insurance requirements	If classification changes costs: renegotiate rates, adjust pricing/minimums, shift to fewer delivery days, and explore hybrid model (in-house lead driver + partners)

3) Prioritized risk matrix (Probability vs Impact)

To make the matrix easy to read, we plot each risk using:

- **Probability on x-axis** (1–5 mapped to 0.2–1.0)
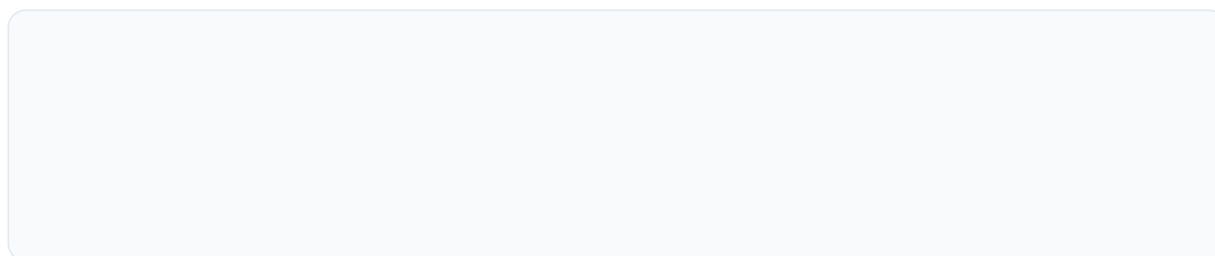- **Impact on y-axis** (1–5 mapped to 0.2–1.0)

Figure 1: Zürich-first risk matrix showing which risks need immediate action versus monitoring.

4) Risk scoring analysis (what to prioritize first)

How to interpret the scores (simple rule)

- **16–25 (Critical):** you can lose the market fast if this breaks (act now)
- **12–15 (High):** very damaging, needs a concrete plan and monitoring
- **8–10 (Medium):** manage with controls and periodic checks
- **≤7 (Low):** keep an eye on it, don't over-invest early

The "act now" cluster for Zürich

The top cluster is all about **service reliability and economics:**

1. **Reliability to the kitchen (R6, R14)**
   If chefs can't trust the delivery window, they will revert to **wholesalers** or **cash-and-carry** (e.g., **Aligro**), even if your product is better.

2. **Retention and repeat orders (R1)**
   In Zürich, word-of-mouth is strong. One restaurant leaving can influence others.

3. **Economics per route (R8)**
   If route density is weak, your commission (6–10%) won't cover the true cost of early-morning delivery with cold chain expectations.

4. **Cold chain and safety (R5, R13)**
   These are "high impact" even if not daily. A single incident can reset trust across the market.

Competitor angle (very specific to your space)

- **Local wholesale distributors** can compete aggressively on price and availability, and they already have morning logistics.
- **Farmy.ch** could expand or market harder to business buyers, and their brand credibility can shift restaurant expectations.
- **Farm shops with delivery** can win on story and freshness for a smaller radius, pulling away the "local farm" narrative.

Your best defense is not "cheaper." It's **chef-grade reliability + consolidated invoicing + predictable slots + seasonal planning** (things wholesalers often don't tailor to independent kitchens).
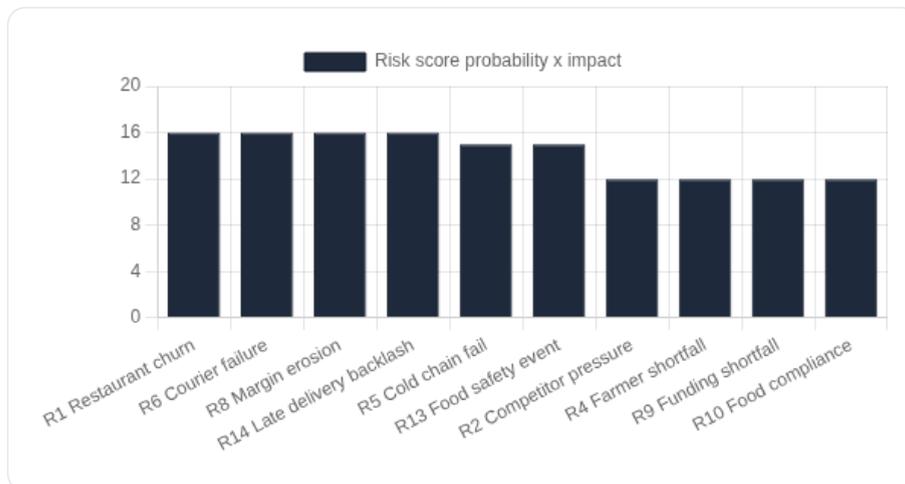
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5) Top 10 risks by score (priority ranking)

Figure 2: Top 10 risks ranked by score, highlighting where management attention should go first.

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6) Scenario planning (Zürich launch, then Lausanne + Geneva)

To keep scenarios useful, we anchor them on a clear baseline and then describe what changes.

Baseline assumptions for comparing scenarios (12-month view, Zürich-first)

These are not "forecasts," just a consistent yardstick:

- **Active restaurants by month 12 (Zürich region):** ~60 in base case
- **Average orders per restaurant:** ~3 per week
- **Average basket size:** ~CHF 220
- **Average commission take:** ~8%
- **Priority plan adoption:** ~15 restaurants on CHF 299/month
- **Farm onboarding fees:** small, one-time, not a major driver

This implies a **base-case 12-month gross revenue** (commission + subscriptions + onboarding) around **CHF 200k–260k**.

Scenario A — Best case (what goes right)

What goes right

- You nail the "next-morning" promise early: high on-time rate and low complaint rate.
- Route density improves quickly in Zürich city and nearby canton, making deliveries cheaper per stop.
- Farms follow packaging and quality standards consistently.
- Restaurants love consolidated invoicing and seasonal planning; retention is strong.
- Competitors don't respond aggressively, or their service feels generic for chefs.

What it looks like

- Strong referrals among chefs and purchasing managers.
- The CHF 299 plan becomes a real anchor product (predictable routes, predictable revenue).
- You can expand to **Lausanne and Geneva** from a position of operational strength.

Revenue impact (12 months)

- **~CHF 450k–650k** gross revenue

Timeline impact

- Demand validation: **4 weeks**
- Paid launch: **~4–5 months** (ahead of the 6-month target)
- Expansion readiness: **month 9–12**

Strategic response

- Scale carefully: cap onboarding to protect service quality.
- Invest in route tooling, temperature logging, and a tight ops playbook.
- Lock in key farms with longer-term agreements for peak seasons.

Scenario B — Base case (most likely)

What happens

- You reach product-market fit with a subset of restaurants: those who value reliability and simplicity.
- Some operational issues happen, but you solve them with process and partner management.
- Competitors create occasional price pressure, but your differentiation remains clear.

What it looks like

- Stable growth in Zürich core zones first (where route density is easier).
- You learn which items are too fragile or too variable early and adjust the catalog.
- Expansion is planned only after metrics are consistently met in Zürich.

Revenue impact (12 months)

- **~CHF 200k–260k** gross revenue

Timeline impact

- Demand validation: **4–6 weeks**
- Paid launch: **~6 months**
- Expansion readiness: **month 12–15** (a bit later than ideal)

Strategic response

- Keep scope disciplined: Zürich city + best nearby corridors.
- Focus on retention and order frequency, not logo count.
- Improve unit economics with minimums, bundles, and smart delivery windows.

Scenario C — Worst case (several bad things at once)

What goes wrong simultaneously

- Courier reliability is inconsistent in early mornings (late deliveries).
- Farm availability is unpredictable (substitutions frustrate chefs).
- You face strong price comparisons versus wholesalers and **Farmy.ch**.
- Credits and refunds rise, eroding margins.
- Restaurant churn increases, slowing route density, which further raises cost per stop.

What it looks like

- You get stuck in a loop: low density → high cost → higher prices or losses → churn → even lower density.
- The team spends most time firefighting deliveries instead of improving the product.

Revenue impact (12 months)

- **~CHF 50k–120k** gross revenue

Timeline impact

- Paid launch slips to **9–12 months**, or launches but stalls
- Expansion is paused; focus stays on stabilizing Zürich

Strategic response

- Narrow the promise: fewer delivery days, fewer zones, fewer SKUs.
- Introduce stricter minimum order and subscription-first delivery.
- Consider partnering with a stronger logistics operator to "buy reliability."
- If needed, pivot to **ordering + consolidated invoicing** first, and reintroduce delivery once operations are proven.

Scenario D — Black swan (unlikely event that changes everything)

What happens One high-impact event hits trust and/or feasibility, for example:

- A publicized **food safety incident** linked (rightly or wrongly) to the service, or
- A major compliance issue forces a temporary stop to deliveries, or
- A sudden operational shock (e.g., widespread courier disruption) during a key season causes repeated failures

What it looks like

- Restaurants immediately revert to known channels (wholesalers, **Aligro**, direct farm purchases).
- Even loyal chefs pause ordering until confidence is rebuilt.
- The business is forced into "crisis mode" with legal, PR, and operational remediation.

Revenue impact (12 months)

- **~CHF 0–40k** gross revenue (and potentially negative net cash due to refunds, legal, and rework costs)

Timeline impact

- Paid launch delayed **12+ months**, or requires a relaunch under stricter controls
- Expansion becomes irrelevant until trust is restored

Strategic response

- Act like a food company, not just a marketplace:
  - Immediate stop-ship where needed, full traceability, transparent communication
  - Third-party safety review and published corrective actions
  - Re-onboard farms and couriers under stricter standards
- Consider a controlled relaunch with a small set of restaurants and a limited catalog to rebuild credibility.
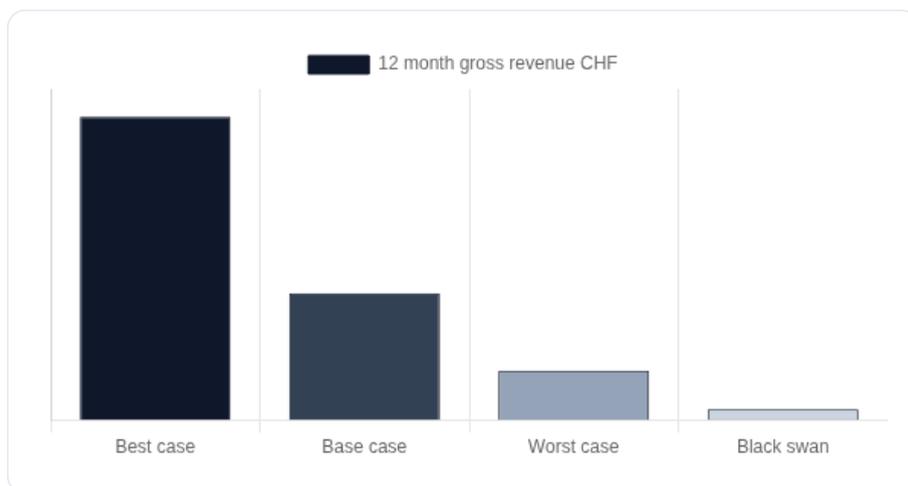

Figure 3: Scenario comparison of 12-month gross revenue outcomes for a Zürich-first launch.

7) Management plan: how to run risk day-to-day (so it's not just a spreadsheet)

A. The 5 operating metrics that prevent the biggest risks

If you track only five things weekly in Zürich, track these:

1. **On-time delivery rate** (by zone and courier partner) → protects R6 and R14
2. **Fill rate** (items delivered vs ordered) → protects R4 and R1
3. **Quality claim rate** (per 100 orders, by farm and SKU) → protects R5 and R13
4. **Contribution margin per route** (after delivery cost and credits) → protects R8
5. **Restaurant retention** (week 4 and week 8 cohorts) → protects R1 and validates the model

B. "Trigger points" that force action

Define thresholds that automatically trigger a response (examples you can tailor):

- On-time < **95%** for 2 weeks → freeze new signups in the affected zone, fix ops
- Quality claims > **2 per 100 orders** on a SKU → pause SKU and audit handling
- Contribution margin negative on a route for 3 weeks → redesign zone or minimums
- Restaurant churn > **10% monthly** → deploy retention playbook + founder outreach
- Credits > **3% of GMV** → investigate root causes (late, missing, quality)

C. The Zürich-first principle for risk reduction

Don't expand to Lausanne and Geneva until Zürich is boring (in the best way):

- Reliability is consistent
- Unit economics work at today's prices
- Farms and couriers operate to a repeatable standard
- Complaints are handled fast and transparently

That discipline is the difference between a strong Swiss expansion story and a multi-city failure that spreads operational problems across the country.

Market Entry & Expansion Strategy

1) The "markets" we're entering (and what "expansion" really means here)

You're not expanding to new countries first—you're expanding **city-by-city inside Switzerland**, where the hard part is **operations** (next-morning reliability, cold chain, packaging standards, routing, and chef trust), not border control.

We'll treat each city cluster as its own mini-market:

- **Market 1 — Zürich city + 30–40 km radius (launch market):** highest density of target restaurants, best place to prove next-morning delivery and consolidated invoicing at speed.
- **Market 2 — Lausanne + nearby Vaud (expansion market):** smaller than Zürich, but strong restaurant scene and a clean way to learn **French-language operations** with slightly less complexity than Geneva.

- **Market 3 — Geneva + nearby canton (expansion market):** high purchasing power and many demanding kitchens; operational complexity is higher (traffic patterns, tight delivery windows, stronger expectations).

Key rule: **don't "expand" until Zürich is boring.** Expansion only works when Zürich delivery quality is stable enough that it doesn't need constant heroics.

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2) Market attractiveness scoring (Zürich vs Lausanne vs Geneva)

2.1 How the scoring works (simple and honest)
- Score each factor **1–10** where **10 = best / easiest / most attractive**.
- "Competitive intensity" is scored as **how favorable the competition feels**:
  - **10 = competition is manageable**
  - **1 = competition is brutal and entrenched** (e.g., strong wholesalers, strong alternatives like Farmy.ch, and chefs happy with Aligro or weekly markets)
- Weighted total gives a single "where should we go next" view.

2.2 Weights (what matters most for this business)
- **Market size:** 25%
- **Growth rate:** 15%
- **Competitive intensity:** 15%
- **Regulatory environment:** 10%
- **Customer accessibility:** 20%
- **Infrastructure readiness:** 15%

2.3 Scores and rationale (localized to these Swiss city markets)

FACTOR	WEIGHT	ZÜRICH SCORE	LAUSANNE SCORE	GENEVA SCORE	WHAT DRIVES THE SCORE IN THIS BUSINESS
Market size	25%	9	6	7	Restaurant density and frequency potential for daily ordering
Growth rate	15%	6	6	5	Growth is more about adoption of ordering workflows than population growth
Competitive intensity	15%	5	6	6	Zürich has strong "default habits" and options (wholesalers, Farmy.ch, cash-and-carry like Aligro)
Regulatory environment	10%	8	8	8	Similar Swiss baseline; differences are mostly execution and documentation, not laws
Customer accessibility	20%	8	6	7	How quickly you can reach decision-makers and convert them (chefs, purchasing managers)
Infrastructure readiness	15%	7	6	6	Courier capacity, route density, early-morning access, parking, reliable cold-chain handling

Weighted totals (out of 10):

- **Zürich: 7.35** (best place to prove the model and unit economics)
- **Geneva: 6.50** (strong value restaurants, slightly tougher operations)
- **Lausanne: 6.20** (great "first French market" and operational stepping stone)

What this means in plain terms

- **Zürich is the must-win.** If you can't make next-morning reliability work there, it won't get easier elsewhere.
- For expansion order:
  - **Lausanne first** if you want the smoothest operational learning curve for French-language rollout.
  - **Geneva first** if you want faster access to higher-value, higher-expectation customers (but accept more operational pressure).
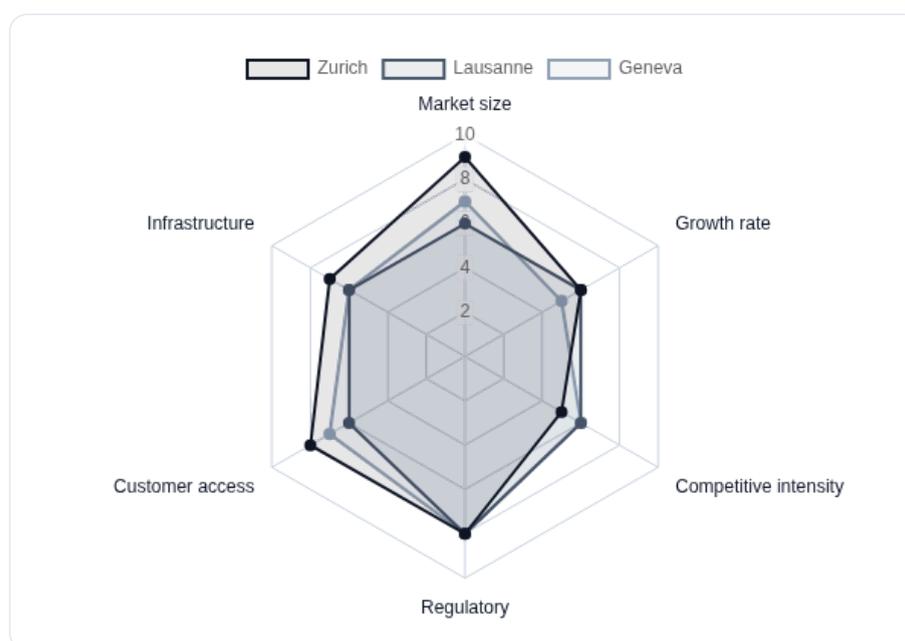- A pragmatic path is: **Lausanne pilot → Geneva pilot**, with shared French assets and shared playbooks.

Figure 1: Market attractiveness radar comparing Zürich, Lausanne, and Geneva across the six entry factors on a 1–10 scale.

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3) Entry mode analysis (what to do, not just what's possible)

Even though we're in one country, the "entry mode" question is still real because each city needs: **supply onboarding, courier reliability, and chef trust**.

Below is the honest evaluation of each mode for this business.

3.1 Direct entry (build from scratch)

What it means here

- You run the playbook yourself: recruit farms, sign restaurants, contract couriers, own QA rules, run customer support.

Pros

- Maximum control over the one thing that matters: **next-morning reliability**

- Brand stays consistent (your "verified Swiss farms + restaurant-ready orders" promise)
- You can iterate quickly on packaging standards and delivery slots

Cons

- Slower start in a new city because relationships take time
- Higher operational load on a small team

Cost (typical)

- **Medium**: hiring + onboarding + local marketing + cold-chain assets

Timeline

- **8–12 weeks** to get a real pilot running in a new city cluster (if you already have the Zürich playbook)

Best use

- **Zürich** (absolutely)
- Also works for **Lausanne/Geneva** once Zürich is stable

3.2 Partnership / joint venture

What it means here

- You keep the product and customer relationship, but you partner deeply with one of:
  - a **courier / cold-chain logistics partner** (most important)
  - a **local produce distributor** (careful: may conflict with your "farm-direct and verified" positioning)
  - a **farm cooperative** (could accelerate onboarding and standards)

Pros

- Faster operational readiness (routes, drivers, depots, early morning access)
- Can lower your fixed costs in the expansion city
- Helps you win trust faster ("we deliver with a known local operator")

Cons

- Less control over delivery experience (late deliveries kill you)
- Margin sharing (your 6–10% commission becomes tighter)
- You need strong contracts and service levels, or quality will drift

Cost

- **Low to medium** upfront, but you "pay" via margin share or minimum volumes

Timeline

- **4–8 weeks** if you already have a partner with the right capabilities

Best use

- **Lausanne and Geneva** expansion: partnership-led is usually the fastest path to reliable next-morning delivery.

3.3 Acquisition

What it means here

- You buy a small local distributor, farm delivery operation, or niche B2B supplier to instantly get customers and logistics.

Pros

- Fastest way to buy routes, relationships, and operational know-how
- Could bring warehouse or cross-dock capacity immediately

Cons

- Expensive and risky for an early-stage business
- Integration pain (systems, culture, service standards)
- You might inherit exactly what you want to disrupt (wholesaler habits)

Cost

- **High** (cash + legal + integration + earn-outs)

Timeline

- **3–9 months** from search to integration, and it can still fail

Best use

- Not recommended in the first 12 months unless a rare, perfect fit appears (small, clean ops, aligned values, easy integration).

3.4 Licensing / franchise

What it means here

- A local operator runs the market under your brand and playbook, paying you a fee.

Pros

- Low capital expansion
- Good if you want to scale to many cities later

Cons

- Hard to protect quality (and quality is your product)
- Your brand can be damaged by one weak franchisee
- Chefs expect accountability when something goes wrong at 7am

Cost

- **Low** cash, **high** complexity in training and enforcement

Timeline

- **2–6 months** to set up properly (contracts, QA, training)

Best use

- More suitable **after** you've proven a rock-solid Zürich model and documented operations (year 2+).

3.5 Digital-first entry

What it means here

- You start in a new city with the lightest version:
  - pre-orders only
  - limited SKUs
  - fewer delivery days
  - possibly "click and collect" or delivery via existing courier partner

- Goal is to test demand without building heavy infrastructure.

Pros

- Cheapest way to validate restaurant demand in Lausanne/Geneva
- Lets you learn the local seasonal preferences fast
- Useful when competition (wholesalers, Farmy.ch, farm shops with delivery) makes it hard to get attention—data helps you sharpen the pitch

Cons

- If the experience is too limited, chefs won't switch habits
- Risk of creating a "meh" first impression
- Hard to promise "guaranteed freshness and predictable slots" if ops are thin

Cost

- **Low** incremental cost (mainly sales + light ops)

Timeline

- **2–4 weeks** to run a real validation sprint

Best use

- As a **pre-expansion wedge**: run digital-first in Lausanne/Geneva while Zürich is scaling, then convert to full ops when gates are met.

3.6 Recommended entry approach (clear choice)

Zürich (launch): Direct entry + strong partnerships

- Direct entry for control of the full promise.
- Partnerships where it helps but doesn't dilute the brand:
  - **2–3 courier partners** with clear service levels and backup capacity
  - potentially **cold-chain crate supplier** and cleaning process partner

Lausanne and Geneva (expansion): Partnership-led direct entry

- Keep product, pricing logic, supplier verification, and invoicing centralized.
- Add a **deep local logistics partner** per city cluster to hit next-morning reliability quickly.
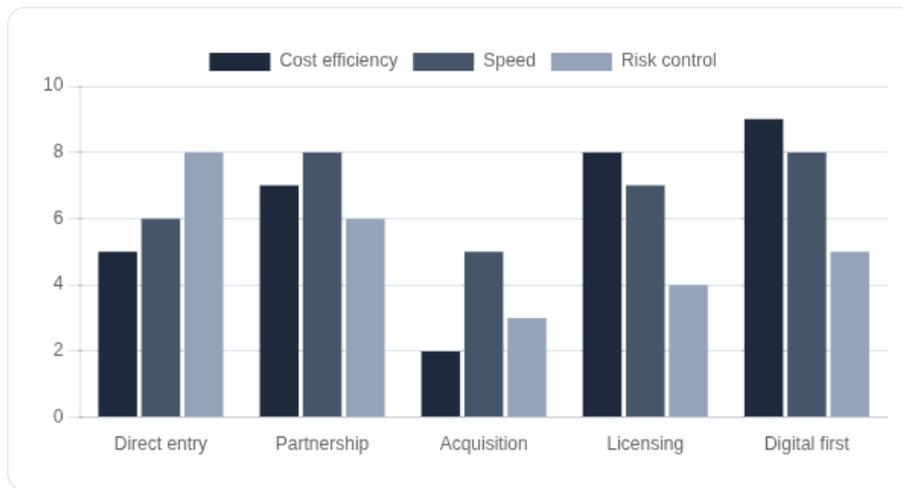- Use **digital-first validation** in the next city while Zürich is still stabilizing.

Figure 2: Entry mode comparison scored on a 1–10 "better for us" scale across cost efficiency, speed, and risk control.

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4) Localization requirements (what must change when moving beyond Zürich)

4.1 Product and service adaptations (what chefs will actually notice)

Language and workflow

- **Full French experience** for Lausanne and Geneva:
    - App UI, farmer profiles, invoices, support scripts, delivery notes

- Keep the flow fast for chefs:
    - "Reorder last list"
    - "Today's seasonal best"
    - "Substitutes approved by chef" (critical to avoid phone calls at 6am)

Catalog structure by region

- Zürich supply is not automatically the same as Vaud/Geneva supply.
- Build **region-specific catalogs**:
    - default to farms within **30–40 km** of each city cluster for freshness and reliable morning delivery
    - keep a small "Swiss-wide staples" list only if it doesn't break the promise

Delivery slot design (city realities)

- Zürich: dense routes, parking constraints, predictable early morning patterns
- Lausanne: hillier geography can slow routes; plan **slightly wider time windows** at first
- Geneva: traffic pinch points; plan **more micro-zones** and strict cutoffs for next-morning orders

Cold-chain and packaging standards

- Standardize:
    - crate types
    - labeling (farm, harvest date if available, batch/traceability tags)
    - cleaning process and swap system

- Add "restaurant-ready" packs:

- consistent sizes, minimal waste, easy storage labeling
- This is where you beat wholesalers on convenience without trying to beat them on breadth.

4.2 Pricing adjustments (keep it simple and consistent, but localize where it matters)

You already have strong willingness-to-pay signals:

- **CHF 8–15 per delivery + 5–10% service fee**, or
- **CHF 250–400 per month** for a priority plan

Recommended pricing localization

- Keep **the same pricing architecture** across cities to avoid confusion:
  - same commission band (6–10%)
  - same plan logic (CHF 299/month priority delivery as the anchor)
- Localize using **delivery economics**, not "what people can pay":
  - Lausanne and Geneva may have different route density and courier costs
  - Instead of raising commission, adjust:
    - delivery fee within your CHF 8–15 band by zone
    - minimum order thresholds for next-morning delivery in low-density zones
    - priority plan availability by zone until capacity is proven

How to message it

- Chefs do not want a pricing lecture.
- Message it as: "We can guarantee next-morning slots in these zones. Outside, we can still deliver, but the slot and fee differ."

4.3 Cultural considerations for marketing (Switzerland-specific, city-specific)

Zürich (German-speaking)

- Win with reliability, speed, and fewer headaches:
  - "Order in 60 seconds"
  - "One invoice"
  - "Predictable delivery window"
- Proof matters more than hype:
  - simple case stories from pilot restaurants
  - clear SLA-like promises (cutoff time, delivery window, substitution rules)

Lausanne and Geneva (French-speaking Romandie)

- Same core value, but tone tends to respond well to:
  - craft, provenance, relationships with producers
  - seasonal menu inspiration
- Use **chef-forward content**:
  - "This week's seasonal picks for bistro menus"
  - "Farm spotlight" in French with practical "how to use it" notes

Competitive positioning (must be explicit)

- Versus **wholesale distributors**: "farm freshness + predictable morning slot + restaurant-ready"

- Versus **farm shops with delivery**: "one order across farms + one invoice + consistent service"

- Versus **Farmy.ch**: "built for restaurants: bulk formats, morning windows, substitutions you control"

- Versus **Aligro and weekly markets**: "save time and reduce stockouts; no early runs; next-morning reliability"

4.4 Legal and compliance requirements (practical checklist)

This is not about exotic rules—it's about not getting sloppy.

Food handling and traceability

- Documented handling procedures (even for produce):
  - temperature guidance for sensitive items
  - cleaning process for crates
  - contamination prevention basics

- Traceability basics:
  - which farm supplied which restaurant order
  - timestamped delivery confirmation

Contracts and accountability

- Clear contracts with:
  - farms (quality standards, packing rules, cutoff times, substitution policy)
  - courier partners (service levels, proof of delivery, loss/damage, temperature handling expectations)

- Make the "who pays when something goes wrong" explicit.

Data privacy and payments

- Swiss data privacy compliance for customer data and ordering behavior
- Payment handling and invoice records that stand up to audits

Insurance

- Product liability, transport insurance, and business liability
- This matters because one quality incident can destroy trust fast in a tight restaurant community.

4.5 Talent and operational needs (what to hire, what to outsource)

Zürich core team (first 6 months)

- Part-time ops coordinator (as planned), but with a clear upgrade path to full-time once volume rises
- Strong customer support coverage early morning (even if it's on-call)

Expansion team model (Lausanne/Geneva)

- Do not copy-paste headcount immediately.
- Start with:
  - **1 local market operator** (part-time at first) who speaks French and can do farm onboarding + restaurant visits

- **logistics partner manager** (could be Zürich ops coordinator initially) focused on service quality and claims resolution
- Keep product/engineering centralized to avoid three versions of the app.

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5) 12-month entry roadmap (month-by-month, with gates)

This roadmap assumes:

- Months 1–6: prove and launch paid in **Zürich**
- Months 7–12: optimize Zürich while preparing and piloting **Lausanne**, then **Geneva**
- Expansion is gated by delivery quality and repeat ordering behavior.

Month 1 — Tight validation sprint (Zürich)

- Interview and sign LOIs or pilot agreements with **10–15 restaurants**
- Confirm the "must-have" workflow:
    - reorder
    - substitutions
    - cutoff time
    - delivery window
    - one invoice
- Shortlist **5–8 farms** that can meet packing and cutoff requirements
- Select **2–3 courier partners** and test early-morning reliability with empty runs

Milestone: clear pilot scope, confirmed cutoffs and delivery windows, initial farm shortlist

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Month 2 — Build the minimum "boring" operations (Zürich)

- Onboard first **5 farms** with packaging standards
- Launch the simplest ordering app experience:
    - limited catalog
    - basic farmer dashboard
    - consolidated invoicing workflow
- Run test deliveries with real produce but limited customers

Milestone: first end-to-end orders delivered next morning with acceptable accuracy

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Month 3 — Pilot volume and quality (Zürich)

- Expand to **10–15 active restaurants** ordering weekly
- Lock the substitution rules:
    - "no substitute"
    - "chef-approved substitute"
- Implement issue handling:
    - missing item, quality claim, late delivery

Gate to proceed: on-time delivery and accuracy are consistently high enough that you're not firefighting daily

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Month 4 — Paid launch readiness (Zürich)

- Introduce paid pricing:
    - commission live
    - delivery fee live
    - priority plan available for a limited set of zones

- Improve catalog hygiene:
    - consistent units
    - restaurant-ready sizes
    - seasonal recommendations

Milestone: first paying cohort and repeat ordering patterns are visible

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Month 5 — Scale supply and repeat ordering (Zürich)

- Expand farm base beyond the first five only if service quality stays stable
- Add "menu planning" features:
    - seasonal availability notes
    - limited-time highlights

- Add basic performance dashboards:
    - on-time, accuracy, substitution rate, claims

Milestone: repeat ordering is growing without support load exploding

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Month 6 — Zürich is stable (and documented)

- Write the "playbook":
    - onboarding checklist for farms
    - delivery SOP for couriers
    - support scripts for chefs
    - claim and refund rules

- Decide expansion order:
    - Lausanne first vs Geneva first, based on partner availability and early demand signals

Gate to expand: Zürich metrics are stable enough to free attention for a second city

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Month 7 — Digital-first validation in Romandie

- Run a **digital-first demand test** in Lausanne and Geneva:
    - French landing page
    - chef outreach
    - limited catalog preview

- collect pre-commitments for pilot
- Identify 1–2 serious logistics partners per city cluster

Milestone: qualified pipeline of interested restaurants and shortlist of farms and couriers

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Month 8 — Lausanne pilot setup

- Onboard initial **Lausanne-area farms** to the same standards
- Set Lausanne delivery zones and cutoff times
- Train support in French workflows

Milestone: first Lausanne test routes completed reliably

Month 9 — Lausanne pilot live

- Go live with **5–10 Lausanne restaurants**
- Make the first operational fixes:
  - packaging edge cases
  - route density adjustments
  - delivery time windows

Gate to Geneva pilot: Lausanne on-time and accuracy meet minimum bar

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Month 10 — Geneva pilot setup

- Onboard Geneva-area farms (keep "verified Swiss farms" consistent)
- Confirm courier partner capacity for tight morning windows
- Tune zoning to avoid known traffic pinch patterns

Milestone: Geneva routes tested and stable enough for real orders

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Month 11 — Geneva pilot live

- Go live with **5–10 Geneva restaurants**
- Expand priority plan only where capacity is real
- Validate whether Geneva has higher average order value and whether service expectations require more support

Milestone: two-city operations running without Zürich quality dropping

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Month 12 — Consolidate, choose the next expansion move

- Decide:
  - deepen Lausanne and Geneva density, or
  - expand radius carefully within each canton

- Strengthen retention levers:
  - reorder flows
  - seasonal planning
  - reliability guarantees

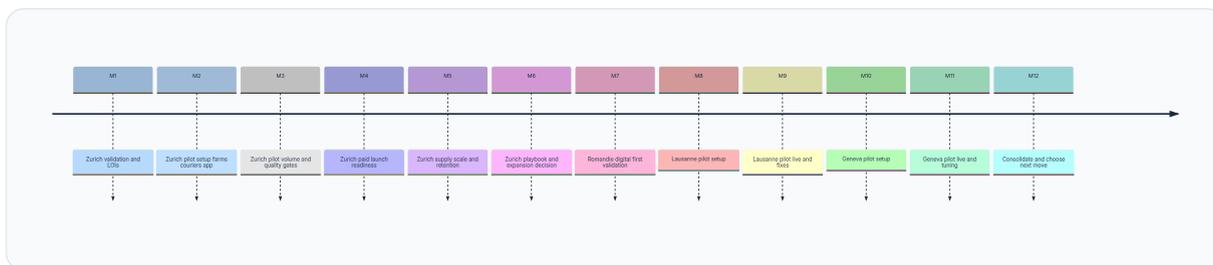**Milestone:** three-market foundation (Zürich plus Lausanne plus Geneva) with repeatable playbook

Figure 3: Month-by-month roadmap showing Zürich launch, then Lausanne pilot, then Geneva pilot, with consolidation at month 12.

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6) Investment requirement (12-month budget estimate and allocation)

Below is a practical budget range for a Zürich launch plus pilots in Lausanne and Geneva by the end of 12 months. This is designed to match your plan (pilot marketing ~CHF 20k) but still be realistic about ops and product.

6.1 Budget (ranges, CHF)

CATEGORY	12-MONTH ESTIMATE	WHAT IT COVERS
Product and tech	70k–120k	Ordering app, farmer dashboard, invoicing, support tools, analytics, bilingual DE-FR rollout
Operations staff	90k–160k	Zürich ops coordinator, part-time local operator in Lausanne, part-time local operator in Geneva, early-morning support coverage
Logistics and cold chain	35k–80k	Crates, cleaning and replacement, delivery testing runs, service-level management overhead
Sales and marketing	40k–90k	Pilot marketing, chef outreach, tastings or farm showcases, local materials, French localization
Legal, insurance, accounting	15k–35k	Contracts with farms and couriers, liability coverage, compliance documentation, accounting setup
Contingency	20k–50k	Quality incidents, courier failures, unexpected rework, seasonal supply disruptions
Total	**270k–535k**	Range depends mainly on build vs buy for product and the level of paid support coverage

6.2 Resource allocation (simple rule of thumb)

- **40–45%** operations and support (because reliability is the product)
- **25–30%** product and tech (because speed and simplicity drive repeat use)

- **15–20%** sales and marketing (because chefs are busy and require trust-building)
- **10–15%** logistics assets, legal, and risk buffer

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7) Success metrics (KPIs for first 6 months and first 12 months)

These KPIs focus on what actually decides survival in this business: **repeat ordering + delivery reliability + unit economics discipline**.

7.1 First 6 months (Zürich only: prove the model)

Demand and retention

- Active restaurants ordering at least weekly: **25–60**
- Average orders per active restaurant per week: **1.5–3.0**
- 60-day retention of activated restaurants: **50–70%**
- Share of orders using "reorder" flow: **40–60%** (signals habit formation)

Operations quality

- On-time delivery rate within promised slot: **95%+**
- Order accuracy rate: **98%+**
- Substitution rate requiring manual calls: **<5%**
- Quality claims per 100 orders: **<3–5**

Supply health

- Active farms meeting standards: **5–12**
- Stockout rate on top items: **low and trending down** month over month
- Packaging compliance rate: **95%+** (less rework, fewer claims)

Unit economics (directionally, not perfection)

- Contribution margin per order: **positive trend** by month 6
- Refunds and credits as percent of GMV: **controlled and declining**

7.2 First 12 months (Zürich + Lausanne + Geneva pilots: prove repeatability)

Expansion readiness

- Time to reach stable pilot in new city: **8–12 weeks**
- Ability to maintain Zürich service levels during expansion: **no major drop in on-time or accuracy**

Multi-city demand

- Active restaurants total across markets: **60–150**
- Lausanne active restaurants by month 12: **15–40**
- Geneva active restaurants by month 12: **15–40**
- Priority plan conversions in zones where offered: **clear upward trend** (even if small at first)

Quality and trust

- On-time delivery rate across all markets: **95%+**

- Net promoter style rating from chefs: **improving trend** quarter over quarter
- Support response time during morning window: **fast enough that chefs trust you** (measure and improve)

Financial discipline

- Gross take rate realized (commission plus delivery fees minus courier costs): **stable and improving**
- Customer acquisition cost payback (simple version): **paid back within a few months** for the best-fit segments
- "Single point of failure" risk reduced:
  - not dependent on one courier partner
  - not dependent on one farm for key items

The strategic takeaway (what to do next)

- **Win Zürich with direct control and reliability.**
- Use **digital-first validation** to line up Lausanne and Geneva demand while Zürich stabilizes.
- Expand with a **partnership-led operating model** in Romandie (especially for logistics), while keeping product, farmer verification, invoicing, and standards centralized.
- Only expand when Zürich performance is steady—because in this business, **one week of bad mornings can undo months of sales.**

Executive Strategy Synthesis

Executive summary (read in 2 minutes)

This business can win in Zürich because it solves a very specific chef problem: "I need Swiss farm produce tomorrow morning, in a format my kitchen can use immediately, without juggling five suppliers and invoices." The differentiator is not the app—it's **reliability + restaurant-ready execution** (availability accuracy, cut-off times, packaging standards, delivery slot discipline, and consolidated billing). If those basics are consistently true, chefs will reorder, tell peers, and stop splitting orders across Farmy.ch, farm shops, and wholesalers for "fresh" items.

The fastest path to a real company is to treat Zürich city + 30–40 km as a **repeatable operating system**, not a one-off launch. That means: pick a narrow starting assortment that farms can supply reliably, lock packaging and substitutions rules, build a morning delivery cadence with 2–3 courier partners, and use a simple ordering workflow that reduces back-and-forth. You should aim to become the "default morning produce run" for a small set of restaurants—then expand restaurant count, then expand farms, then expand geography (Lausanne/Geneva only after Zürich is boringly consistent).

The strategic recommendation is a **Balanced Growth approach**: prove the unit economics and service metrics in Zürich with a controlled pilot, then scale sales with confidence. The CEO-level job for the next 90 days is to force clarity on the few decisions that drive everything: what you deliver, when you deliver, what you guarantee, how you handle substitutions, and what you charge for reliability. This is how you outcompete Farmy.ch (broad, consumer-like experience), farm shops (limited logistics consistency), wholesalers (strong supply but less farm-direct storytelling/seasonality), and Aligro (self-pickup convenience but time cost).

Current state assessment (brutally honest)

What you have today (based on the plan):

- A clear target customer: independent bistros and mid-sized restaurants in Zürich (chefs/purchasing managers).
- A strong, narrow value promise: **next-morning, restaurant-ready, Swiss farms, predictable slots, one invoice**.
- A plausible pricing corridor: CHF 8–15 per delivery + 5–10% service fee, or CHF 250–400/month for a priority plan.
- A sensible validation plan: 10–15 restaurants in 4–6 weeks; 3-month pilot with 5 farms; paid launch in ~6 months.
- Identified core resources: part-time ops coordinator, simple app/dashboard, courier partners, cold-chain crates, ~CHF 20k pilot marketing.

What you do *not* have yet (the real risks):

- Proven operational reliability in Zürich mornings (the whole business depends on this).
- Confirmed supply depth for "chef staples" across seasons (not just interesting items).
- Tight standards for packaging, labeling, substitutions, and "restaurant-ready" prep level.
- A working cadence with couriers that protects freshness and on-time slots during peak traffic.
- Evidence that commissions + delivery fees cover the true cost-to-serve at small order sizes.

Bottom line: Right now it's a strong concept with a credible plan—but still fragile. One messy month (late deliveries, wrong items, inconsistent availability) will push chefs back to wholesalers, Aligro runs, or "just use Farmy.ch when we can." Your next phase is not "growth." It's **earned trust through repeatability**.

Strategic options (3 distinct paths)

Option A — Conservative / low-risk: "Zürich reliability first"
What it is

- Stay in Zürich city + 30–40 km until performance is excellent and repeatable.
- Start with a narrower assortment (the items you can deliver perfectly).
- Add restaurants slowly; focus on reorder rate and delivery reliability, not logos.

Expected outcome

- Slower revenue growth but higher retention and strong word-of-mouth.
- A strong playbook that makes later Lausanne/Geneva expansion cheaper and less chaotic.

Investment required

- Lower cash burn; focus spend on ops, packaging standards, and a simple product.
- Marketing stays targeted (chef-to-chef referrals, small local outreach), not broad campaigns.

Timeline

- 0–3 months: pilot stability and metrics.
- 3–6 months: controlled scale within Zürich; prepare expansion playbook.
- 6–12 months: expand to Lausanne or Geneva only if Zürich is consistently strong.

Key risks

- A competitor can copy pieces while you move slowly.

- Team morale risk if "progress" feels incremental.
- Farms may want faster volume growth than you can responsibly deliver.

Option B — Balanced growth: "Prove the model, then scale sales"

What it is

- Run a disciplined pilot in Zürich, but build the commercial engine in parallel.
- Expand restaurant count once weekly performance is stable (not perfect, but predictable).
- Keep Lausanne/Geneva as a planned Phase 2, triggered by metrics.

Expected outcome

- The best chance of building a durable business with manageable risk.
- Faster learning than Option A, without betting the company on aggressive expansion.

Investment required

- Moderate: ops + product + sales outreach + some marketing.
- Spend is tied to measurable milestones (not hope).

Timeline

- 0–6 weeks: validate demand with 10–15 restaurants (real orders, not "interest").
- 0–3 months: 3-month pilot with ~5 farms; lock the Zürich operating system.
- 3–6 months: paid launch in Zürich; expand restaurant base.
- 6–12 months: expand to Lausanne _or_ Geneva after meeting trigger metrics.

Key risks

- Doing "pilot + selling" can distract the team from execution quality.
- If you scale restaurants faster than farm supply consistency, you will lose trust quickly.
- Requires strong weekly discipline on metrics and decision-making.

Option C — Aggressive / high-risk: "Land-grab across Zürich + Romandie"

What it is

- Push into Zürich plus Lausanne and Geneva quickly to capture mindshare.
- Broader assortment, more farms, more couriers, heavier marketing spend early.

Expected outcome

- Potentially faster top-line growth and a perception of scale.
- If it works, it can deter smaller competitors and attract partners/investors.

Investment required

- High: more ops hires, more courier capacity, bigger marketing, more complex product needs.
- Higher working capital pressure due to logistics and service expectations.

Timeline

- 0–3 months: run Zürich pilot while simultaneously onboarding farms in Lausanne/Geneva.

- 3–6 months: multi-city launch attempt.
- 6–12 months: either scale rapidly or face churn and operational fire-fighting.

Key risks

- High chance of service failures (late/incorrect deliveries) across multiple cities.
- Harder to debug issues when problems are spread across routes and suppliers.
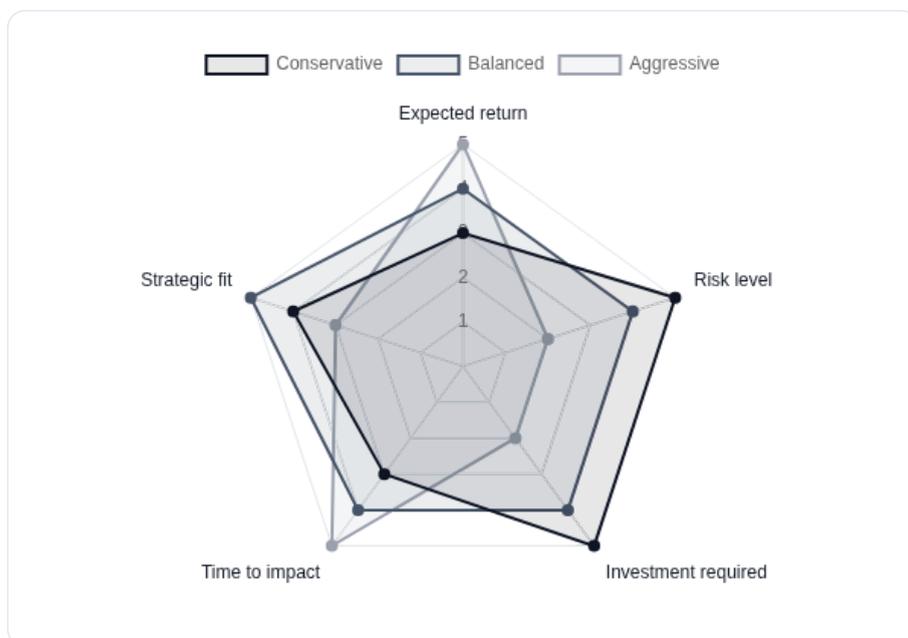- Brand damage is likely if chefs try you once and get burned.

Figure 1: Radar comparison of the three strategy options on a 0–5 score where higher is better. For Risk level and Investment required, higher means lower risk and lower investment.

Recommended strategy (top pick)

Recommendation: Option B — Balanced growth, with strict "Zürich readiness" gates

Pick **Option B** because it matches the nature of this business:

- Your advantage comes from **trust built through repeated, flawless mornings**, not from being everywhere first.
- At the same time, you need enough commercial momentum to learn quickly and justify the operational setup (couriers, crates, coordination).
- Balanced growth lets you scale *after* you've proven the few things that matter most to chefs in Zürich: availability accuracy, predictable delivery, and kitchen-friendly packaging.

The core logic (plain language)

Chefs don't reward "interesting." They reward "it shows up exactly when promised." So your strategy should be:

1. **Earn trust in Zürich** with a controlled pilot that proves consistency.
2. **Then scale restaurant acquisition** inside Zürich while holding service standards steady.
3. **Then expand city-by-city** (Lausanne or Geneva) only when Zürich performance is boringly reliable and documented.

What "readiness gates" should look like (examples)

Before expanding to Lausanne/Geneva, Zürich should hit targets like:

- On-time delivery rate: consistently high (define a tight delivery window and track it)
- Order accuracy: minimal errors, with fast resolution when something goes wrong
- Substitution handling: clear rules that chefs accept (and low complaint rate)
- Reorder rate: restaurants ordering weekly without prompting
- Positive unit economics trend: each added restaurant improves profitability, not worsens it

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Priority initiatives (next 90 days, ranked)

1) Lock the "Zürich morning operating system" (non-negotiable basics)

Goal: Make next-morning delivery predictable and repeatable.
What to do in 90 days:

- Set firm cut-off times (ordering today → delivery tomorrow).
- Define delivery slots (few at first) and enforce them.
- Write the rules for substitutions, out-of-stock, and credits so chefs aren't surprised.
- Create a simple escalation path for issues (one phone/WhatsApp number, fast fixes).

2) Standardize farm onboarding and "restaurant-ready" packaging

Goal: Reduce chaos at the source.
What to do:

- Packaging checklist: labeling, weights, crate packing, temperature handling.
- Minimum quality standards and a "no surprises" policy.
- Light training for farms (and a clear pass/fail onboarding).

3) Design the starter assortment for Zürich (small, reliable, high-repeat)

Goal: Win with staples first, not variety.
What to do:

- Build a starter catalog that covers frequent chef needs (seasonal Swiss produce plus a stable core).
- Limit SKUs to what you can deliver perfectly.
- Add "menu planning suggestions" only where supply is truly predictable.

4) Build the simplest possible ordering + invoicing workflow

Goal: Save chefs time and reduce admin friction.
What to do:

- Fast reordering (favorites, last order repeat).
- One invoice and clear line items (farm source, weights, fees).
- Transparent delivery tracking (even basic status updates beat silence).

5) Run a focused restaurant acquisition sprint in Zürich (10–15 real buyers)

Goal: Validate demand with paid behavior, not enthusiasm.
What to do:

- Target the best-fit segments: independent bistros and mid-sized restaurants that value seasonal Swiss sourcing and consistent mornings.
- Offer a pilot promise: "We deliver tomorrow morning reliably—if we fail, you get a credit."
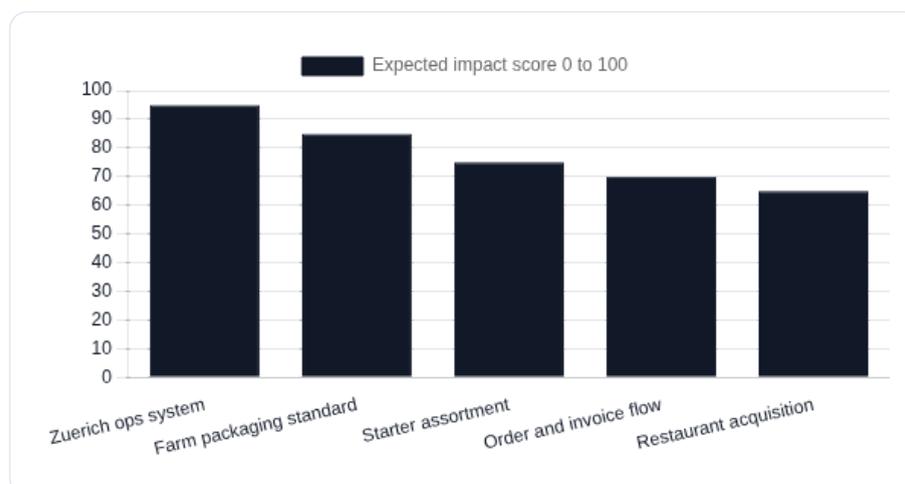- Make retention the KPI: reorder rate within 2–3 weeks.

Figure 2: Ranked view of the five 90-day initiatives by expected impact on trust, retention, and operational stability in Zürich.

Resource requirements (people, money, tools)

People (minimum viable team for the next 90 days)

- **Ops coordinator in Zürich (part-time, but strong):** owns daily execution, farm coordination, courier handoffs, issue resolution.
- **Founder/CEO (full-time focus):** restaurant sales, partnerships, standards decisions, and weekly metric review.
- **Product builder (contract or part-time):** simple ordering flow, farmer dashboard basics, invoicing exports; keep it lightweight.
- **Courier partners (2–3):** not employees at first; you need redundancy for mornings.
- **Optional (if you can afford it):** a part-time finance/admin support for invoicing and reconciliation (prevents back-office drag).

Money (practical budget buckets)

- **Pilot marketing:** ~CHF 20k (as stated), but keep it targeted in Zürich (chef outreach, small local campaigns, referral incentives).
- **Cold-chain crates + labels + packaging supplies:** enough to run morning routes without quality drops.
- **Courier costs buffer:** plan for a "reliability tax" early—paying for redundancy is cheaper than losing chefs.
- **Product and tooling:** modest build cost; avoid overbuilding before you lock the operating rules.

Tools (keep it simple, high leverage)

- **Ordering + catalog:** basic web app is enough initially if it's fast on mobile.
- **Farmer dashboard:** availability updates, packing checklist, pickup readiness confirmations.
- **Route coordination:** simple integrations (status updates, delivery confirmation).

- **Metrics dashboard:** on-time, accuracy, complaints, reorder rate, gross margin per order (simple spreadsheet to start is fine if disciplined).

Decision framework (a simple matrix for the next 10 strategic decisions)

The matrix: Reversible vs irreversible, and customer impact

Use this for each big decision. It keeps you fast where you can be fast, and careful where you must be careful.

DECISION TYPE	LOW CUSTOMER IMPACT	HIGH CUSTOMER IMPACT
Reversible (easy to change)	Decide fast. Test in 1–2 weeks.	Pilot with 3–5 restaurants first. Communicate clearly.
Irreversible (hard to undo)	Get 2 opinions. Write it down.	Slow down. Do a pre-mortem. Add a small-scale trial if possible.

How to apply it (rule of thumb):

- If it changes **chef trust** (delivery windows, substitution rules, credits), treat it as **high customer impact**.
- If it changes **cost structure** (own fleet vs partners), treat it as **hard to undo**.

The next 10 decisions to run through this matrix

1. **Delivery promise:** exact delivery windows in Zürich and what "on-time" means.
2. **Cut-off time:** how late chefs can order for next morning.
3. **Substitution policy:** allowed vs not allowed, and how chefs approve it.
4. **Minimum order / delivery fee logic:** protect unit economics without annoying chefs.
5. **Priority plan design:** what CHF 299/month truly guarantees (and what it doesn't).
6. **Assortment boundaries:** what you will *not* sell yet (to protect reliability).
7. **Courier model:** partners only vs partial in-house (and when to change).
8. **Farm onboarding bar:** how strict you are, and how you enforce standards.
9. **Returns/credits policy:** speed, fairness, and fraud protection without bureaucracy.
10. **Expansion trigger:** the exact metrics required before Lausanne/Geneva.

"If I only had 1 hour" brief

Single most important insight:
In Zürich, this is not a marketplace game—it's a **trust game built on mornings**. You will not beat Farmy.ch, wholesalers, or Aligro on variety or habit. You win by becoming the one supplier that reliably solves tomorrow morning with zero drama.

Single most important action (do this next):
Write (and commit to) your **Zürich service promise** on one page: cut-off time, delivery windows, substitution rules, packaging standard, and how credits work when you fail. Then run it with 10–15 restaurants for 4–6 weeks and measure reorder rate. If reorder is strong and complaints are low, you have a business worth scaling. If not, fix the operating system before you grow.