




A global perspective on Agri-Food

Global trends transitioning the US\$8 Trillion Agri-Food Industry

Summerfruits NZ Stakeholder Meetings

Ian Proudfoot

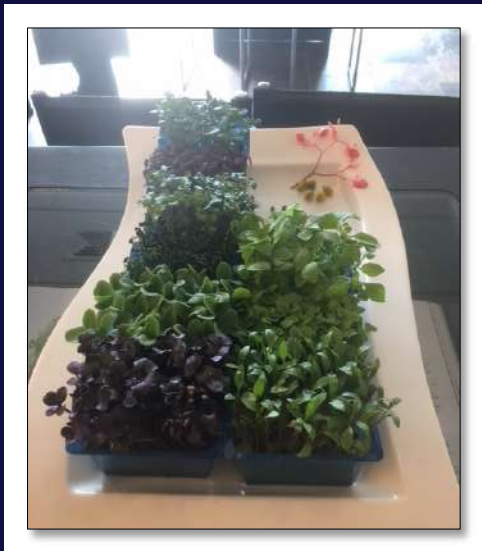
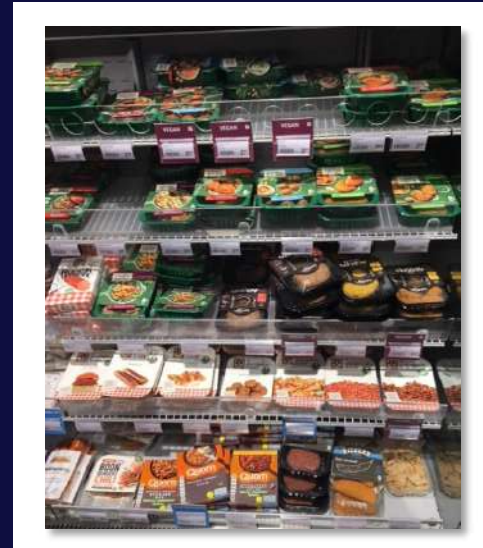
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 IProudfoot_KPMG

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**“CHANGE IS COMING...
WE JUST DON'T KNOW
WHAT IT IS GOING TO LOOK
LIKE”**



PERSONALISED NUTRITION

CULTURED FARMING

FARMING TO ORDER

NON-TARIFF BARRIERS

MICRO-ALGAE FOODS

BIO-PLASTIC MARKERS

CANNABIS ECONOMY

COUNTERFEIT PROTECTION

BIOTECHNOLOGIES

ARTISAN AND CRAFT

NOVEL PROTEINS

FOOD WASTE RECOVERY

BY AND CO PRODUCTS

ANCIENT AND HERITAGE

SHARING PLATFORMS

FUNCTIONAL FOODS

VERTICAL FARMING

CLIMATE CHANGE

VEGAN AND FLEXITARIAN

REGENERATIVE SYSTEMS

GENE EDITING

BREXIT

BIOSECURITY

RESILIENT RURAL ECONOMIES

ZERO CARBON FOOD

LICENSE TO OPERATE

MODERN SLAVERY

FOOD DELIVERY SYSTEMS

OPTIMISING BLUE LARDER

DIGITAL AUGMENTED FARMING

BLOCKCHAIN LEDGERS

SOCIAL IMPACT AGRI

PREVENTATIVE HEALTH

CLONING

WATER RESILIENCE

ZERO HUNGER

DRONES AND ROBOTICS

ANTIBIOTIC RESISTANCE

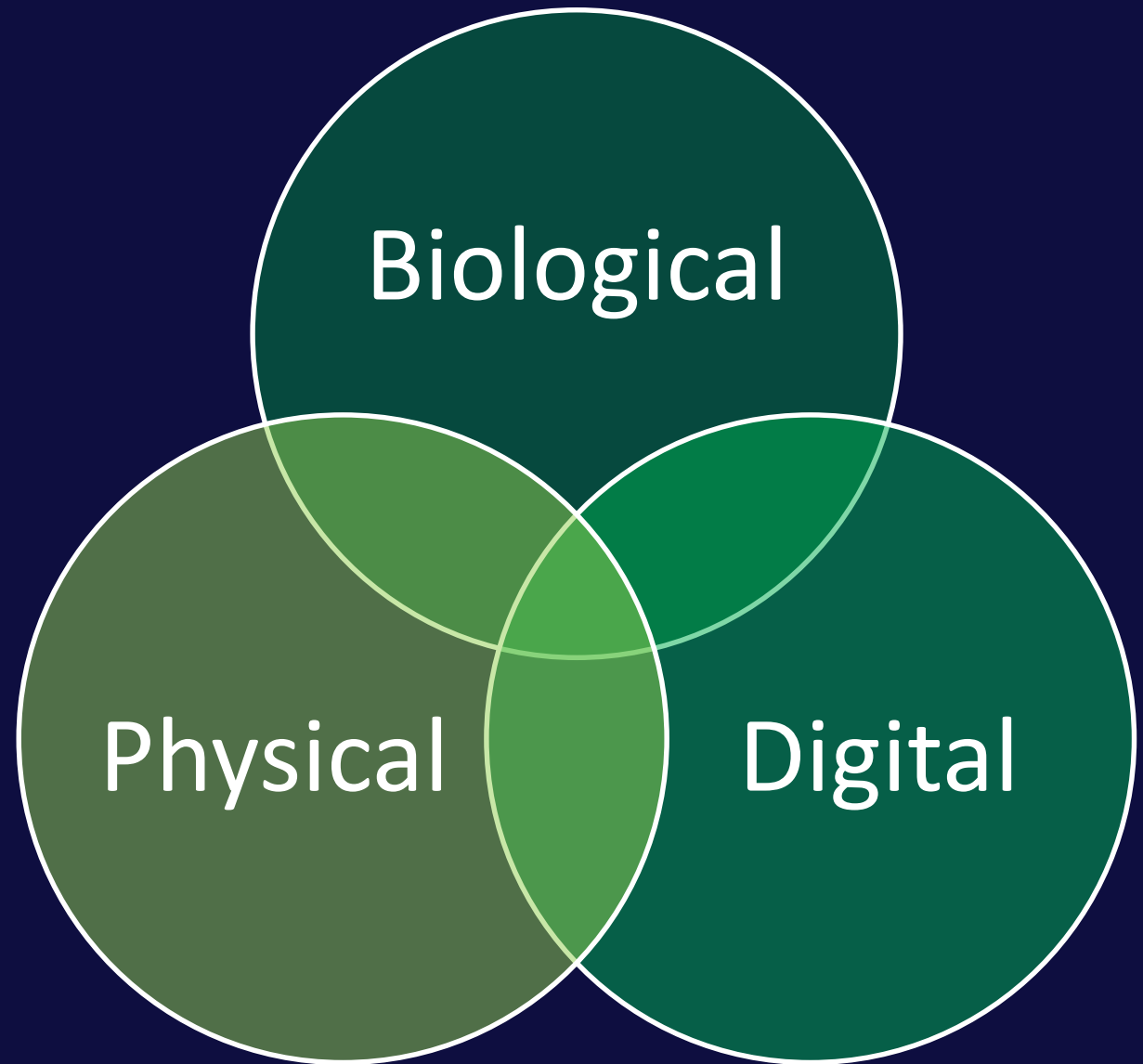
FOOD PRINTING

LIFESTYLE ENABLED FOOD

LOCAL FOOD

AND MANY MORE.....

THE GLOBAL AGARIAN REVOLUTION



DISRUPTION

=

OPPORTUNITY

Sustainability defines the agri-food sector's future - need to produce more with less



Food is an integral component of emerging preventative healthcare systems



Protein agnostic companies are emerging as the protein transition accelerates



The novel food landscape

Plant based



Cellular farmed



Other options





Other key issues facing global agri-food businesses





Waste is in the spotlight - it increasingly risks the license to operate



Impact is no longer a nice to have - it's a business imperative



Ethical impacts of biotechnology evolving global consumer perceptions



Attribute enhanced food can attract a transient premium



Robotics, AI and IoT augment and enhance the intuition of food producers



Growers need to plan to extract value from Blockchain obligations



If it is not worth counterfeiting...it is not worth buying



You can no longer rely only on global trade rules to secure market access - more is needed



Government will not solve your problems - they are struggling to regulate change



Every consumer is driven
by their personal
circumstances





Clean food

Lack of understanding

Animal welfare

Health and wellness

Personalised nutrition

Opinions on GMO



Growing practices

Focus on natural

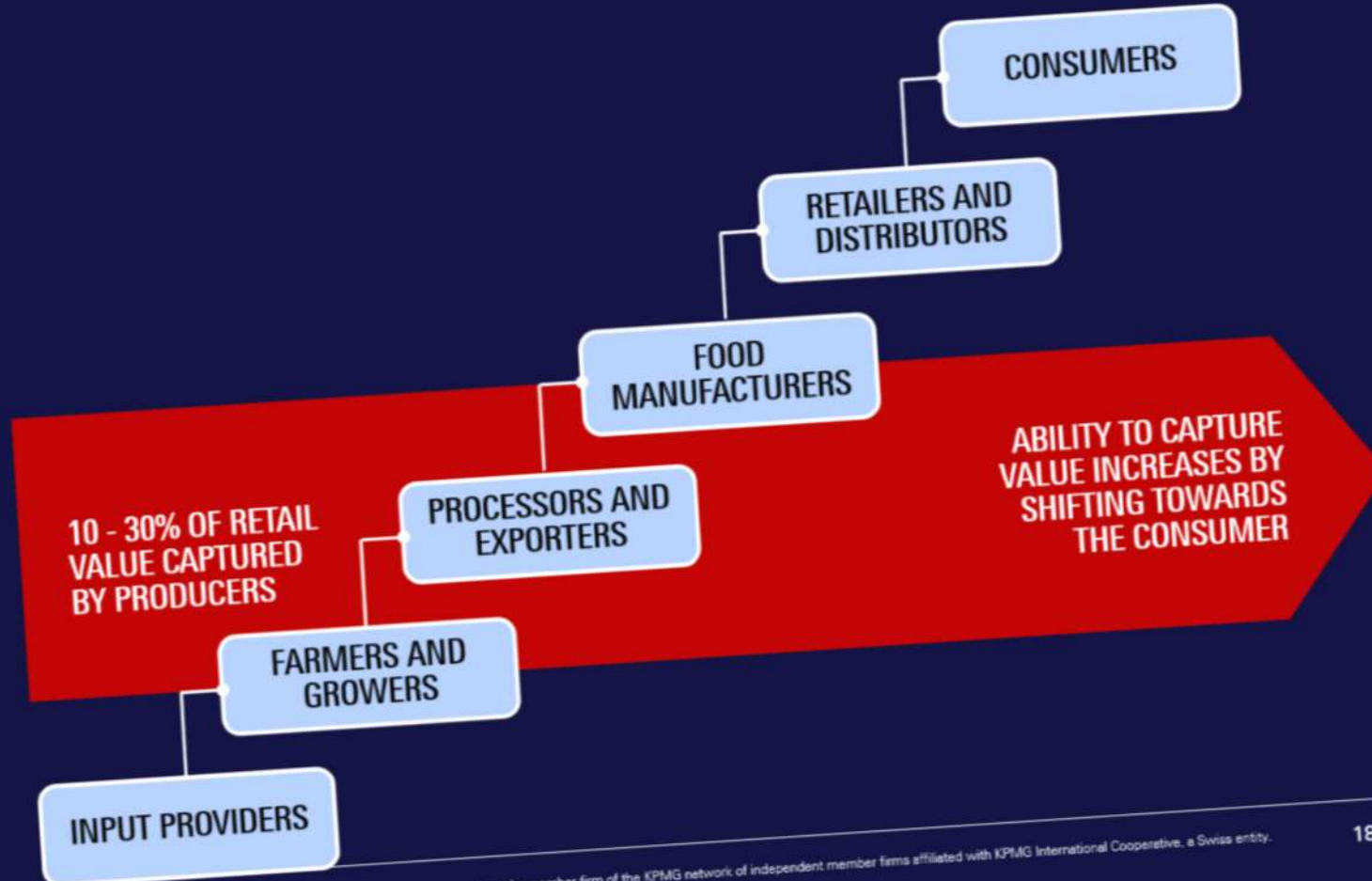
Affordability

Generation Voice

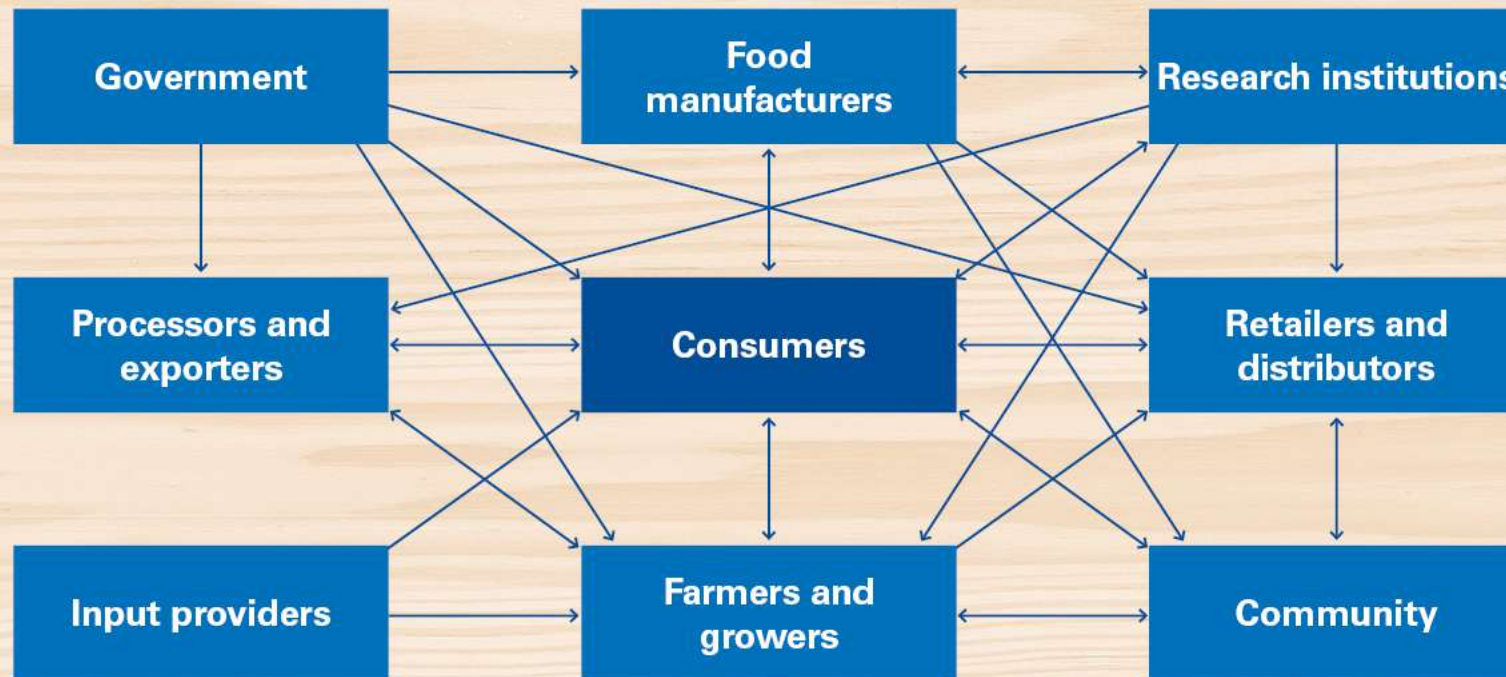
Is it safe....or safer?

Government regulation

Traditional value chains will never deliver to food producers



Envisaging the future: a consumer-centric value web



Target investment to get close to consumers

TANGIBLE
CAPITAL
ASSETS

PEOPLE

BRAND
EXPERIENCE

INNOVATION

CONSUMER
CONNECTION

CRITICAL INTANGIBLE INVESTMENTS

Limited
competitive
differential

Standing out drives value



Thank you

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