



Global perspectives

Shaping NZ's Food and Fibre Future

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kpmg.com/nz





**“WE DO NOT INHERIT THE
WORLD FROM OUR PARENTS
- WE BORROW IT FROM OUR
CHILDREN”**

*ORIGIN GREEN, BORD BIA
IRELAND*





Whole Foods Market

**“WITH GREAT COURAGE, INTEGRITY AND LOVE,
WE EMBRACE OUR RESPONSIBILITY TO CO-
CREATE A WORLD WHERE EACH OF US, OUR
COMMUNITIES, AND OUR PLANET CAN FLOURISH
– ALL THE WHILE, CELEBRATING THE SHEER
LOVE AND JOY OF FOOD”**

***PURPOSE STATEMENT
WHOLE FOODS
MARKET INC***



**“WE CHOOSE TO GO
TO THE MOON IN THIS
DECADE AND DO THE
OTHER THINGS, NOT
BECAUSE THEY ARE
EASY, BUT BECAUSE
THEY ARE HARD”**

*PRESIDENT JOHN F
KENNEDY
RICE UNIVERSITY,
HOUSTON
SEPTEMBER 1961*



Millennial consumers



The ageing population



Urban citizens

Envisioning their food futures



Millennial consumers



**THE HYPER-CONNECTED
CONSUMER WHO SEEKS
INSTANTANEOUS
ACCESS TO THE LATEST,
GREATEST THING**

Millennial consumers



Instantaneous access



Crowd source farming



Alternative proteins



Food is fashion



Social disruption



Food as a social connector



FOODTM
INK.



The ageing population

I am so pleased to know that you are celebrating your one hundredth birthday on 21st March, 2008. I send my congratulations and best wishes to you on such a special occasion.

Elizabeth



AN EXPANDING COHORT OF SENIOR CITIZENS FACING LIFE MANAGING CHRONIC HEALTH ISSUES, ALBEIT MANY ARE EQUIPPED WITH FINANCIAL RESOURCES

The ageing population



Food for chronic health



Tailored nutrition



Accessible packaging



Craft mainstreams



Passionate foodies with the time to explore



Something a little bit naughty!

Urban citizens



THE RAPIDLY BURGEONING
POPULATION, SWELLED BY RURAL
PEOPLE **SEEKING A BETTER LIFE
IN CROWDED, SPRAWLING
METROPOLITAN REGIONS**

Urban citizens



'Bok Choy' effect



Seeking local food



Reinventing retail



On the Go Dominates

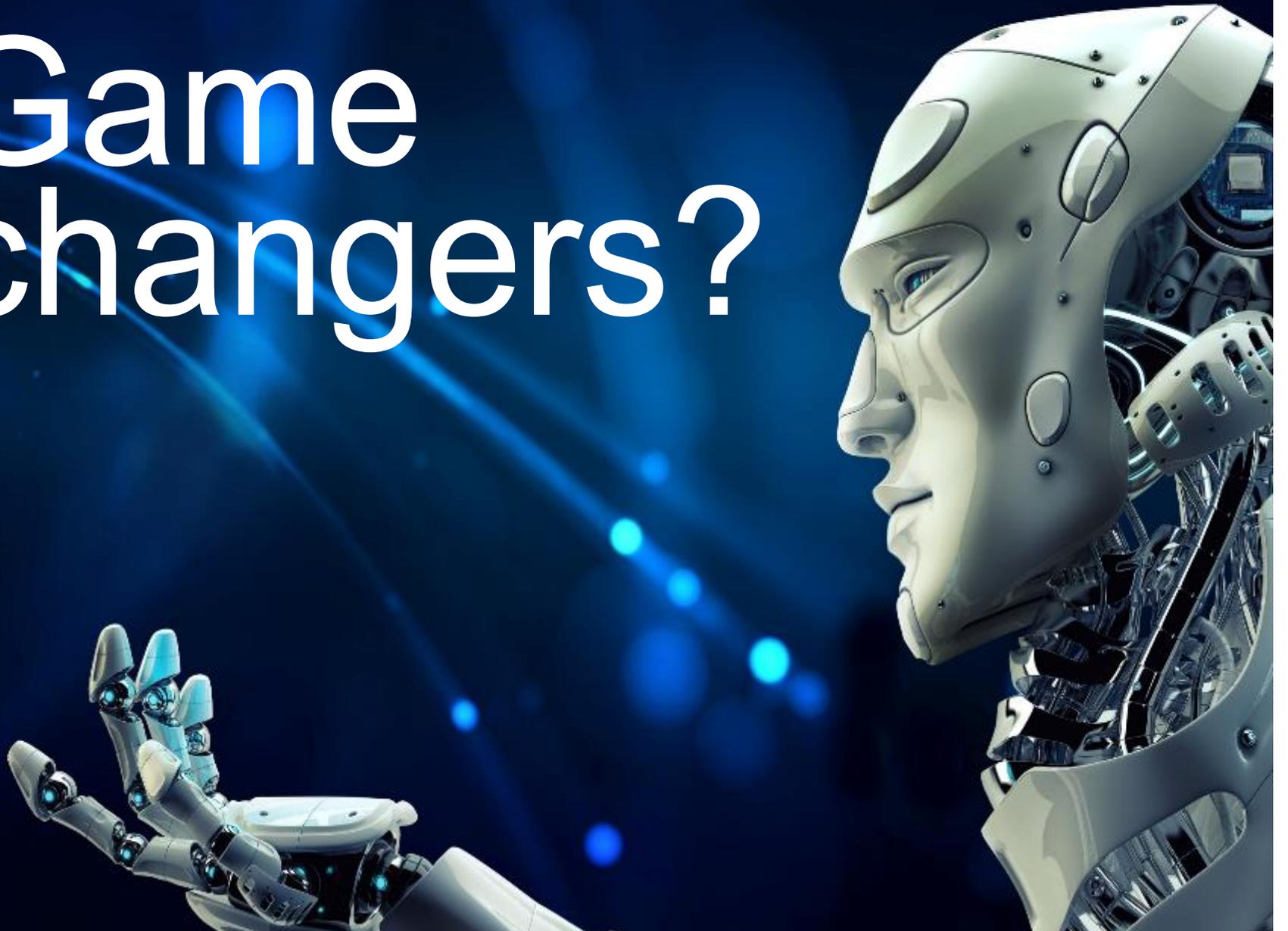


New dining paradigms



Value in ultra raw

Game
changers?



Disrupting the future



New health paradigms



Industrialised cloning



Unbundling GMO's



Post antibiotic farming



Valuing every last drop



Native flora and fauna



soylent

fa!r!life
believe in better milk

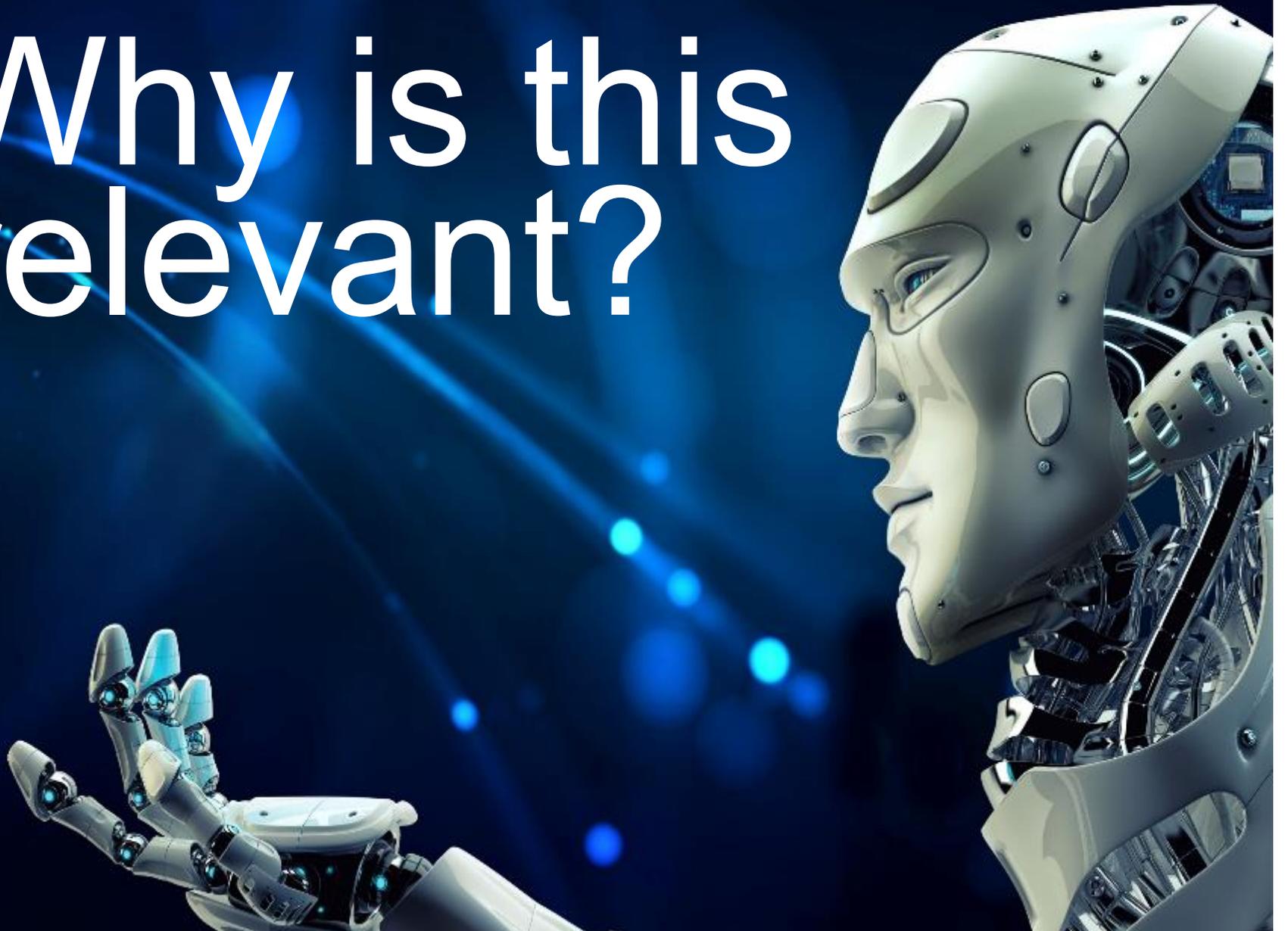
Perfect Day

WhiteWave
FOODS

glanbia
NUTRITIONALS



Why is this
relevant?



The size of New Zealand's prize

Export value



\$37 BILLION

6.75 Times

Estimated retail value



\$0.25

TRILLION

Investment is necessary to get closer to high value customers

TANGIBLE
CAPITAL
ASSETS

PEOPLE

BRAND
EXPERIENCE

INNOVATION

CONSUMER
CONNECTION

CRITICAL INTANGIBLE INVESTMENTS

Responding to change



Foresight and scanning



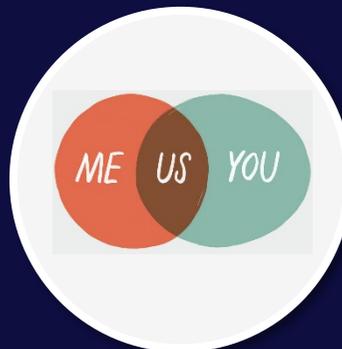
Enabling governance



Take risks/ fail fast



Focused innovation



Real collaboration



Consumer insight

GAME CHANGER: Closing the GAP between Auckland and Rural New Zealand





Thank you

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