

Field Notes app



Available on the
App Store



GET IT ON
Google Play





The Recipe for Action

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What has caught my attention recently?



Country of origin



Corporate venturing



Supply chain transparency



Core transformation



Retail game changer



Speaking to attributes



Protix: Insect Scaling



AR Enabled Packaging

Export value



\$37 BILLION

6.75 Times

Estimated retail value



**\$0.25
TRILLION**

Emerging Opportunities





**SUSTAINABILITY DEFINES
THE FARMING
CONVERSATION**



**FUSION TECHNOLOGY
TRIGGERS AGRARIAN
REVOLUTION**



**HEALTH FRAMES THE
FOOD CONVERSATION**



**NEW COMPETITORS
EMERGING**



GLOBAL DIETS EVOLVE



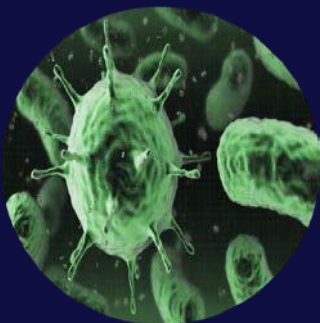
**ALTERNATIVE PROTEINS
GAIN TRACTION**



**TRADITIONAL WAYS OF
EATING ARE RESHAPED**



**DINING PARADIGMS
RESPOND TO LIFESTYLES**



**'FREE FROM' FOOD
ATTRACTS PREMIUMS**



**FOOD WASTERS RISK
THEIR LICENSE TO OPERATE**



**THE PASSION OF THE
FOOD PRODUCER WINS**



**VIRTUAL REALITY PUTS
YOUR CONSUMER IN
THE MIDST OF YOUR
BUSINESS**

Envisioning future markets



Millennial consumers



Instantaneous access



Crowd source farming



Alternative proteins



Food is fashion



Social disruption



Food as a social
connector

The ageing population



Food for chronic health



Personalised nutrition



Accessible packaging



Craft mainstreams



Passionate foodies
with the time to explore



Something a little bit
naughty!

Urban citizens



New urban farms



Intensive and organic?



Reinventing retail



On the Go Dominates



Technology enabled
eating



Value in ultra raw

DISRUPTION

=

OPPORTUNITY

“WE BELIEVE THE FUTURE FOR THE NEW ZEALAND AGRI-FOOD SECTOR IS AS AN ARTISAN, NICHE PRODUCER OF PREMIUM QUALITY, SAFE AND SUSTAINABLE FOOD AND BEVERAGE, FIBRE AND TIMBER PRODUCTS

...THE SECTOR DOES NOT ONLY FEED THE WORLD BUT ALSO PROVIDES THE IMPORTANCE OF MAKING A SUSTAINABLE CONTRIBUTION TO HELPING THE WORLD TO FEED ITSELF”

AUTHENTIC FOOD

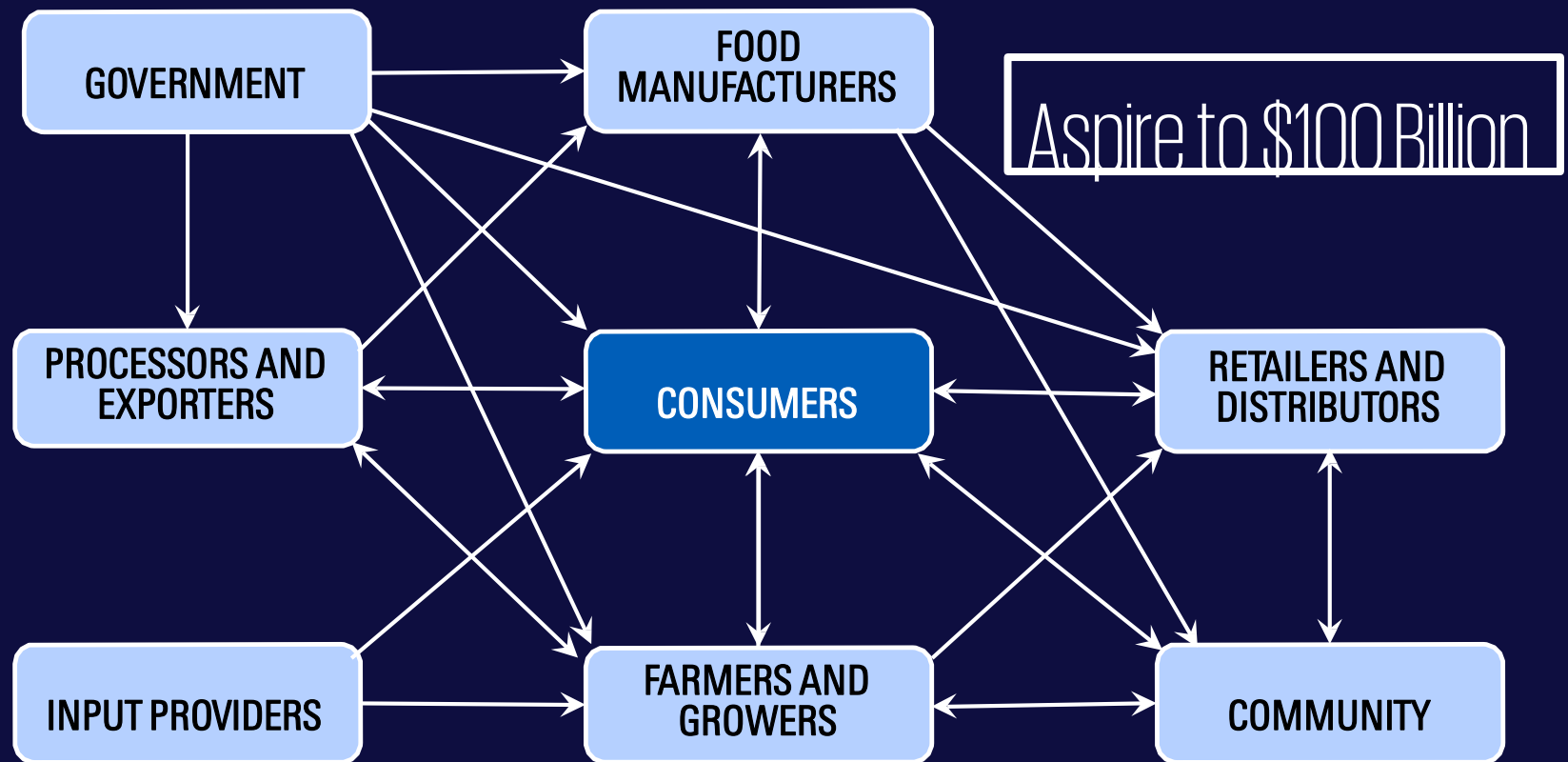
A great example of a global consumer food story – clooney.co.nz



Pivoting
towards the
consumer



Envisaging the future: a consumer centric value web



Top priorities



1. Maintain world class biosecurity [1]
2. Create NZ provenance brands [5]
3. Strategic food safety [2]
4. Deliver high speed connectivity [4]
5. Innovate with customers [6]
6. High quality trade agreements [7]
7. Delivering R&D incentives [8]
8. Increasing rural/ urban understanding [23]
9. Developing future leaders [9]

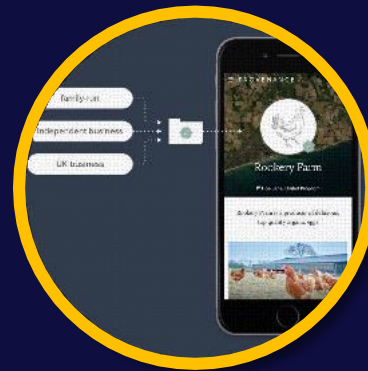
Customer focused journey end to end (see provenance.org)



Know your Consumers



Provenance Platform



Verification



Track and Trace



Communication Tools



Smart Labelling



Relevant export
brand development



Effective export
market activation

The recipe
for action



TELL AUTHENTIC STORIES ABOUT AUTHENTIC FOOD

Is NZ our story?



Or a platform to our story?



Strengthening
New Zealand's
food culture



Capitalising on the
benefits of diversity



Delivering an integrated
lifelong learning framework



Pursuing sustainability
first – no debate!



Adopting and
utilising
technology
Quickly



Reinventing operating
models to secure future
prosperity



Collaborating to grow scale
and impact



Connecting deeply with
customers



Learning from the world



Storytelling in a
multi-channel
world



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