

Agriculture Export Positioning

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General Manager

Growth and Emerging markets



Australian Government
Australian Trade Commission



Agriculture = food and fibre

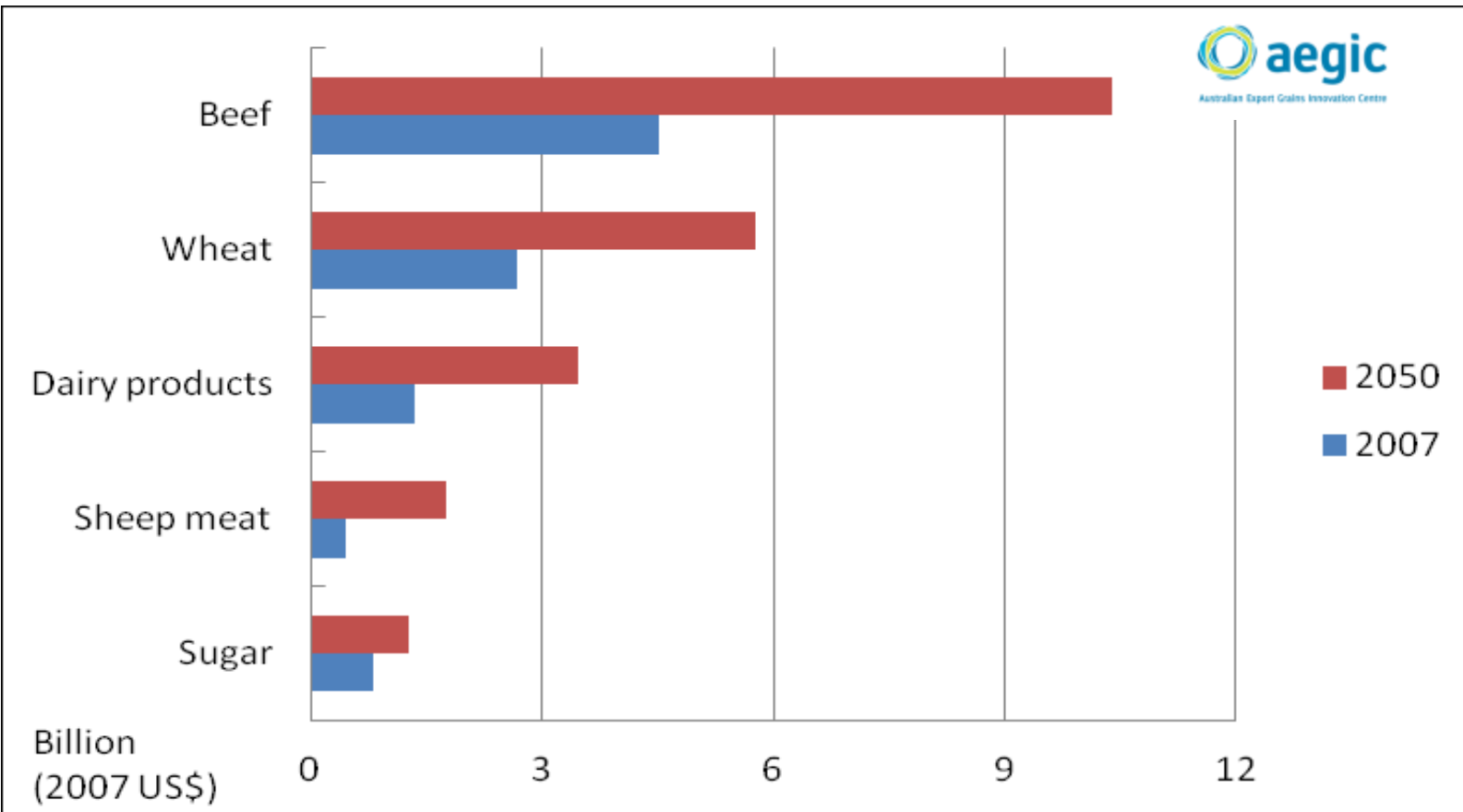
Food security comprises three elements:

- Locking down a supply chain
- Food safety, and
- Nutrition

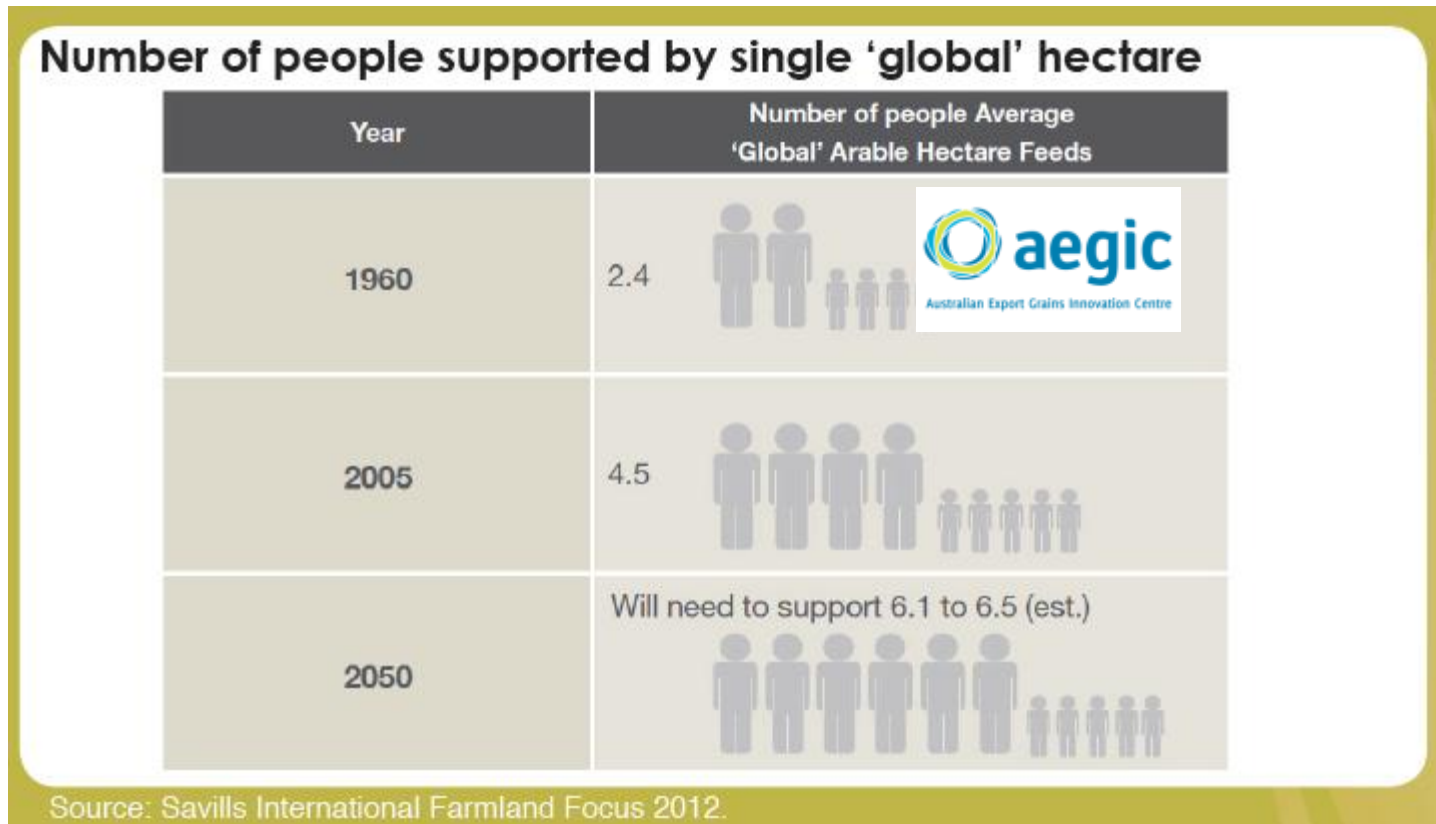
Four x agricultural markets:

- Staple food for human critical needs – mostly grains and cereals but also protein products,
- Sustainable fisheries and their own management issues,
- Highly desirable horticultural products (but not necessarily human critical), and
- Premium products with a clear and distinctive value proposition to consumers around uniqueness, quality, safety or packaging.

Australia's food export projections



Sustainability of production resource (arable land & water utilisation)

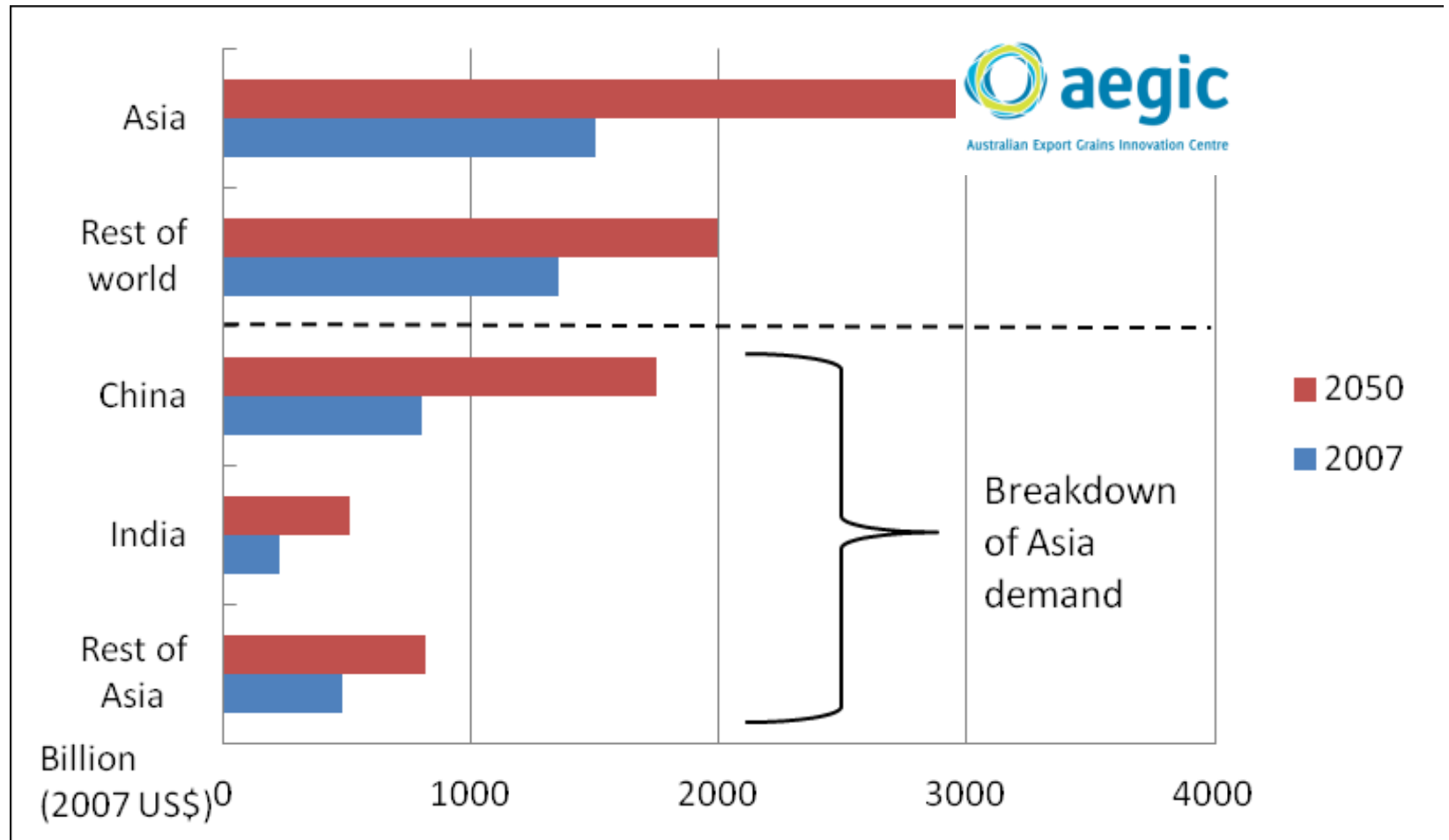


- One arable Hectare will need to feed 30% more people by 2050

A 'Generalisation' – only two markets in the world

- China, and
- Not China

Future Food Demand



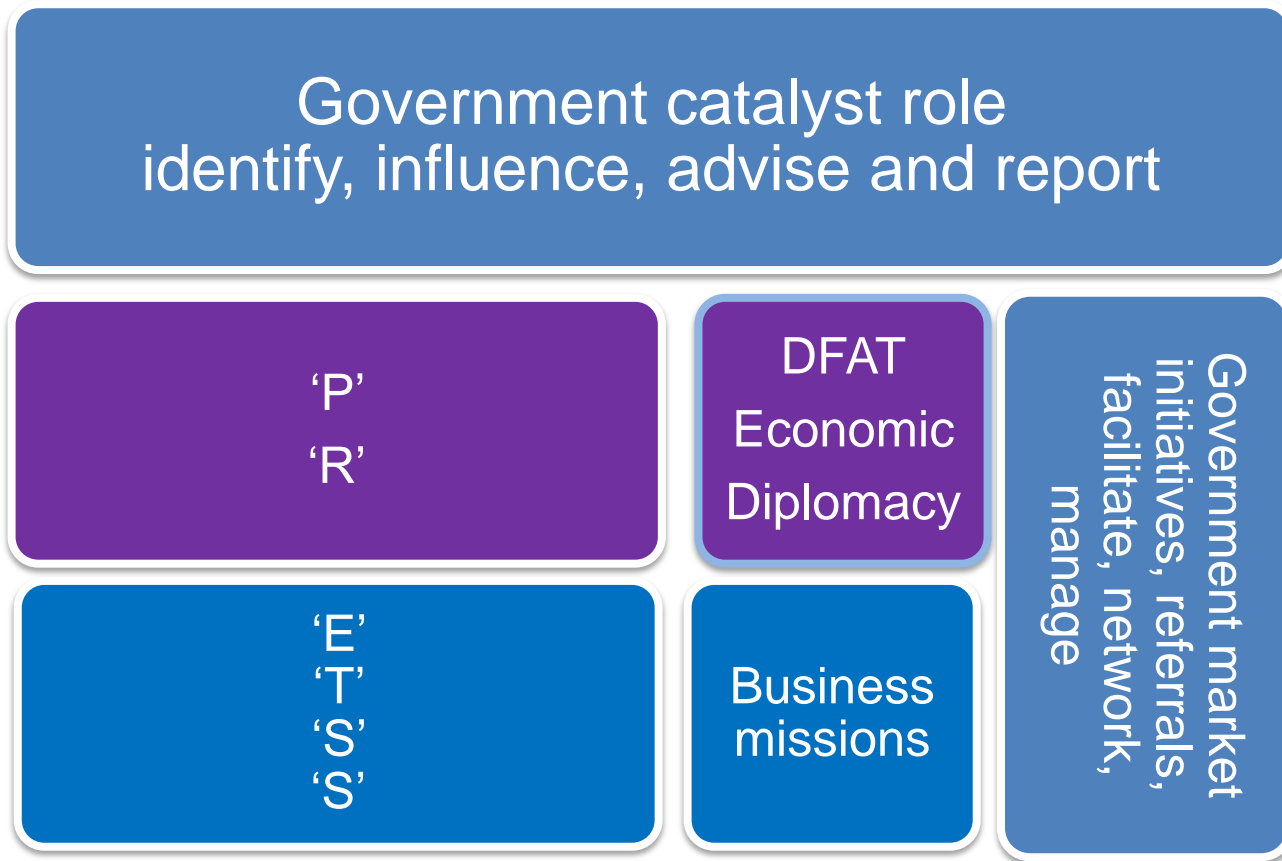
How do we analyse and articulate a high value opportunity?



- 'P'** Policies, Regulations, Governance or Institutions necessary to enable a market opportunity to proceed
- 'R'** the Research or research collaboration needed to define the market failure that creates a new market requirement and or describe a way forward for its implementation
- 'E'** refers to the equipment, good, or product that contributes to a market opportunity solution
- 'T'** refers to technology, innovation or processes that may be required to contribute to a market solution
- 'S'** refers to the skilling required to deploy a solution
- 'S'** refers to the services required to deploy a solution

Follow the PRETSS trail...

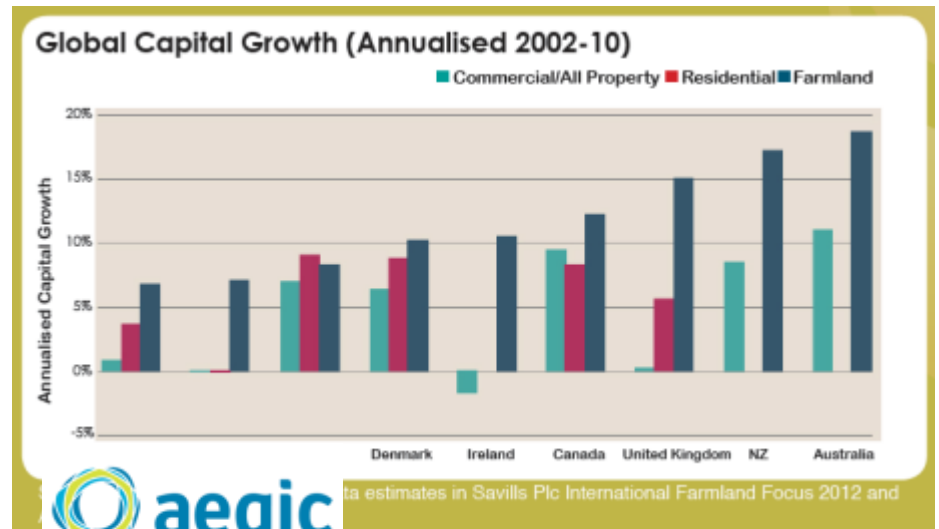
Relationship to Economic Diplomacy and Business missions



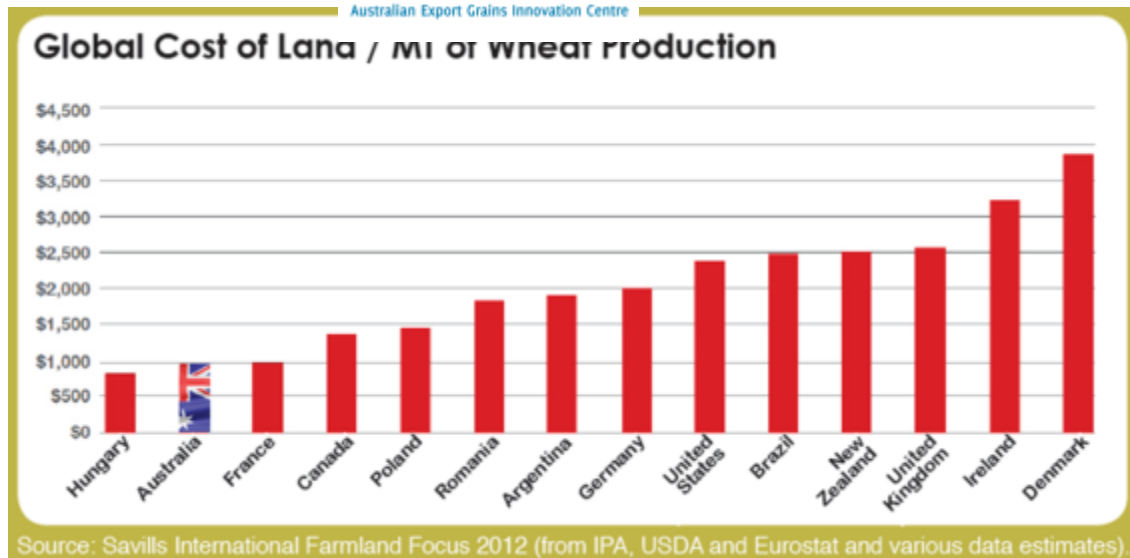
New 'Positioning' Opportunities

- Northern Australian
- The Energy Water Food Nexus

Go where the money is!



Australian Export Grains Innovation Centre



Source: Savills International Farmland Focus 2012 (from IPA, USDA and Eurostat and various data estimates).

EWF Nexus

