



TARGET MARKET OPPORTUNITIES IN ASIA FOR FRESH APPLES

Part of Asia Market Success, April 2016



Department of
Agriculture and Food



ROYALTIES
FOR REGIONS

CORIOLIS 

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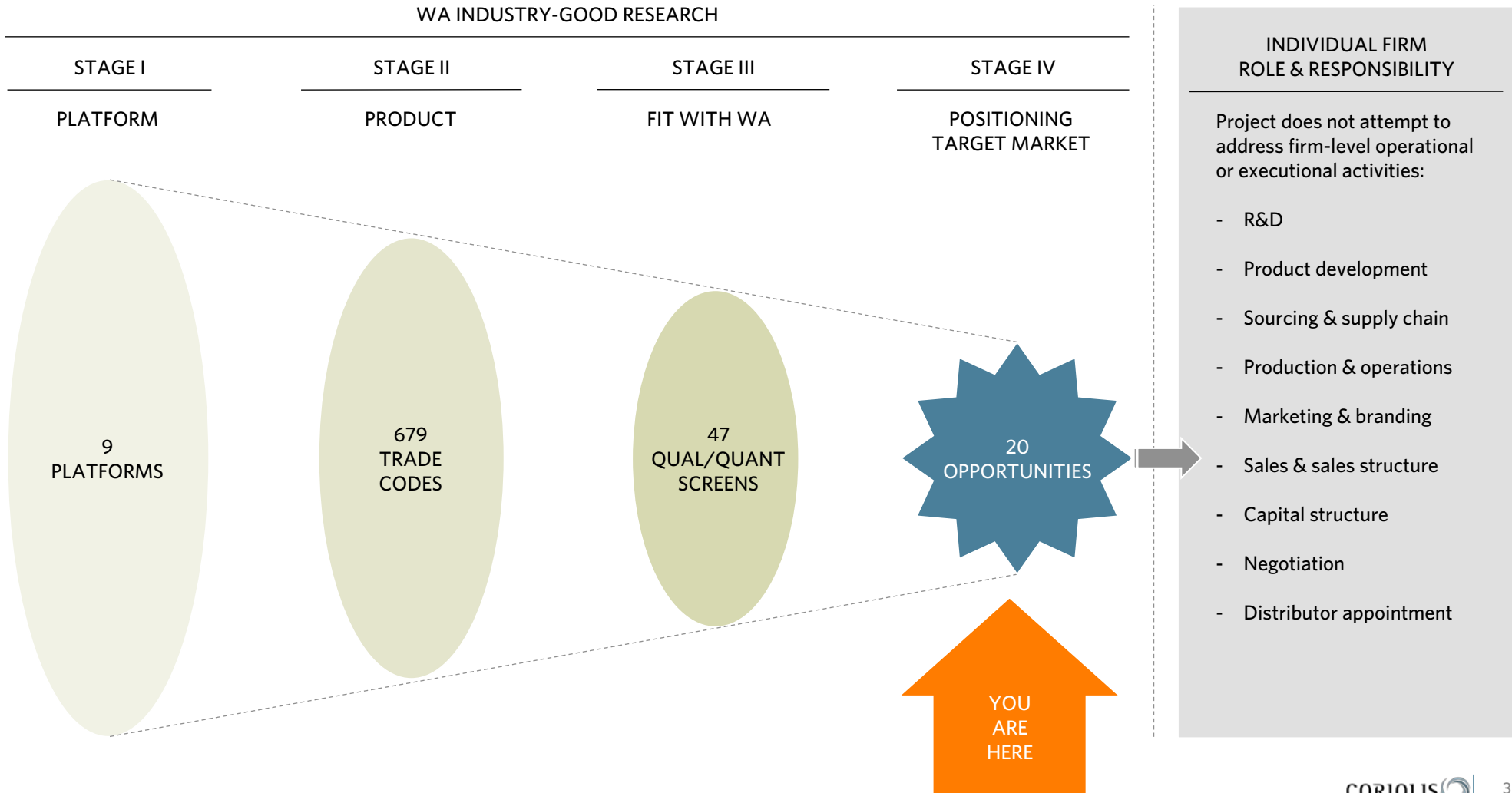
FINAL v100; April 2016

SCREENING OVERVIEW

In Phase One of the Target Market Opportunities in Asia for WA Premium Products Report (TMO Report), extensive import/export trade data was fed through a multi-stage screening process to “hone-in” on potential opportunities for Western Australia; stakeholder interviews also fed into this process

STRUCTURE OF MULTI-STAGE SCREENING PROCESS USED IN THIS PROJECT

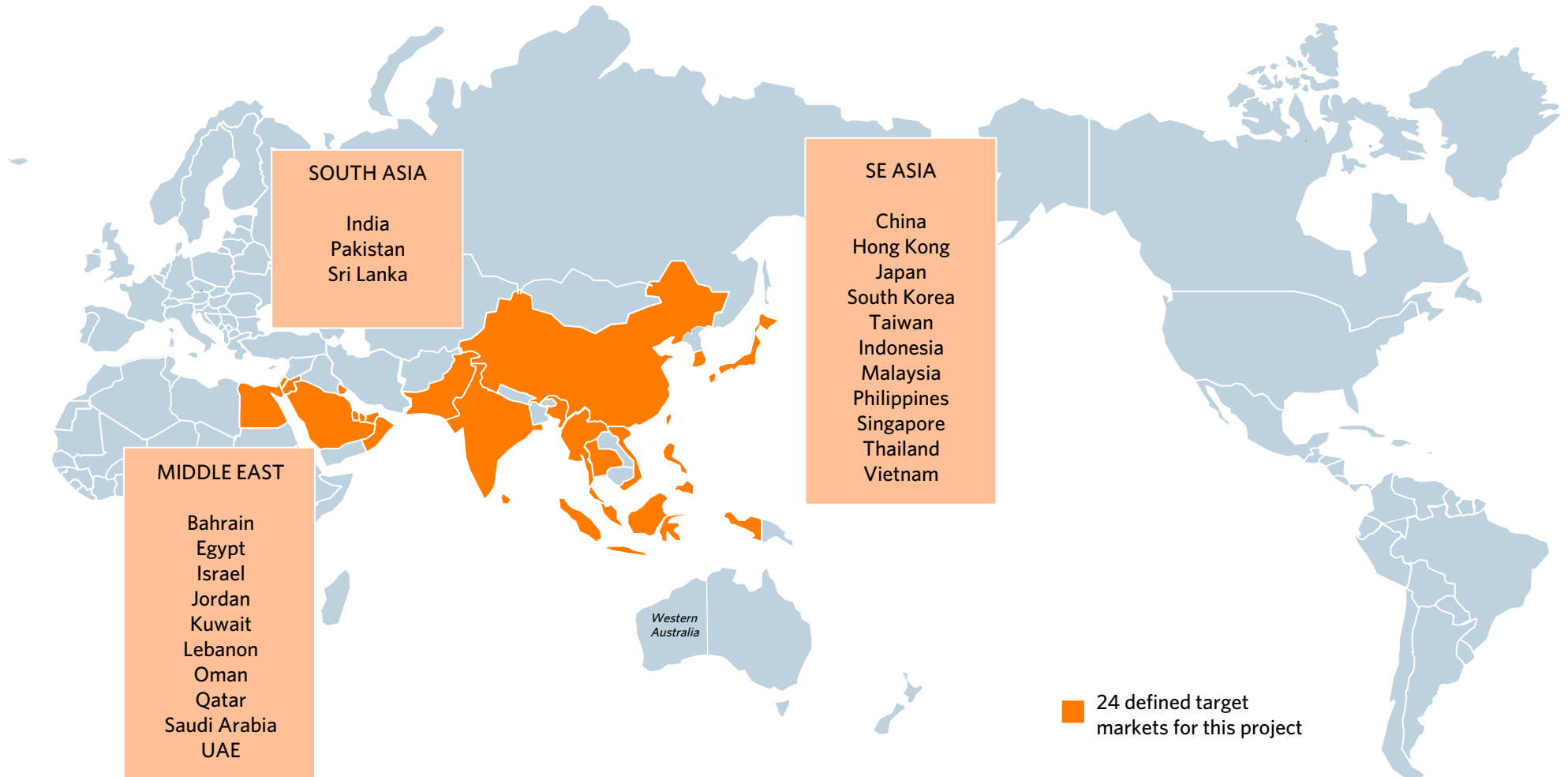
Model; 2016



This project is focused on “market demand” from the following twenty-four Asian/Middle Eastern markets

24 COUNTRIES DEFINED AS HIGH POTENTIAL TARGET MARKETS FOR WESTERN AUSTRALIA

Target markets; 2015



Note: Complete list for analysis purposes, some countries excluded from list if no/limited trade data available (e.g. Iran)

WHAT IS THE PRODUCT?

Fresh apples emerged in Phase I as one of twenty “high growth, high potential” opportunities for Western Australia; apples are tree fruit that are consumed fresh and used as an ingredient

PRODUCT OVERVIEW

Example; 2016

PRODUCT PROFILE	
HS Code	080810
Product	Apples, fresh
Out-of-scope	Frozen, cooked, pureed, preserved apples, juices, baby foods, supplements, etc. as all are covered under other screened trade codes
Origin	Central Asia, cultivated in Asia and Europe for thousands of years
Example ingredients	Apples
Forms/usage	<ul style="list-style-type: none">- Snack- Ingredient in cooking, baking, desserts- Preserves, jams and sauces- Juiced- Baby food- Gift giving
Drivers of consumer/ market success	<ul style="list-style-type: none">- Healthy snack- Eaten across the world- Versatile- Convenient

DOCUMENT STRUCTURE

What is the strategic situation in the market?

In this environment, what is the opportunity for Western Australia?

Who are the potential in-market partners?

Who are the key firms in Western Australia capable of delivering?



Western Australia can increase apple exports to Asia by focusing on select high value markets

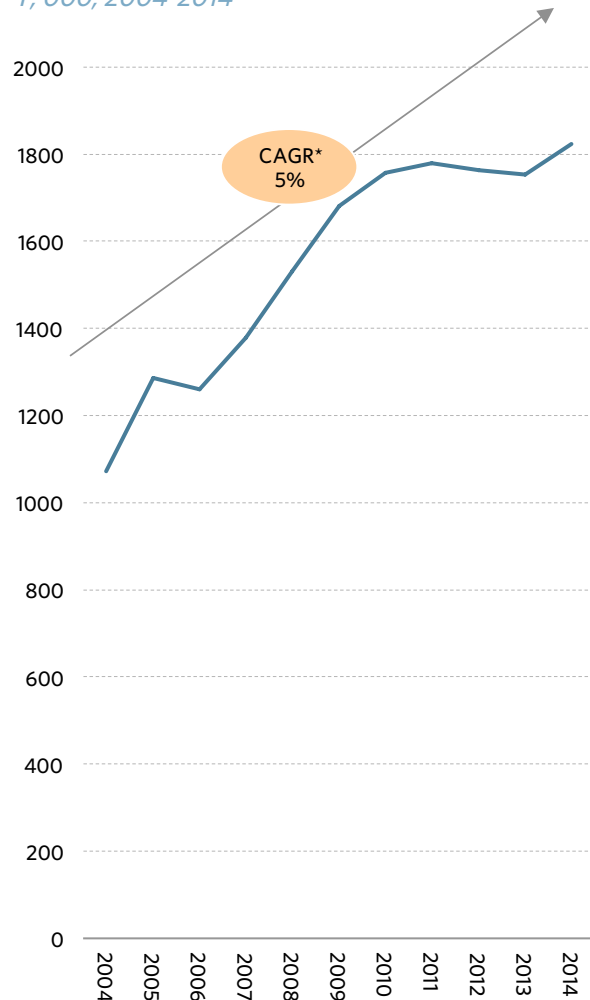
- Asian apple imports are rising, with import value growth being driven by expanding tonnage and increasing average FOB (free-on-board) prices
 - Asian & Middle Eastern apple imports come from three broad regions: Southern Hemisphere (Chile, NZ and South Africa), Western/Northern Hemisphere (USA, Italy, France, and other Europe) and China/other Asia
 - China, the USA and Italy stand out for driving apple import value growth in Asia & the Middle East
 - China and the USA lead in absolute volume growth, while Italy and “other Europe” lead in rate of growth
 - Average FOB price to target Asian markets vary by supplier, with Japan and Australia standing out for achieving good premiums
- Apples go to a wide number of the target markets, with no single country predominating; China is a relatively small importer
 - Growth in apple imports is broad based and coming from across multiple markets
 - India, Egypt and Taiwan stand out for growth; a range of markets have declining volumes, but growing value, indicating a move to quality
 - Average apple import prices vary by region, with East Asia paying more than SE Asia and the Middle East; Taiwan stands out as a large market that pays well
 - Imported apple consumption and aggregate apple imports appear partially driven by income per capita; a number of markets appear to have long-run penetration upside
- Market share varies by country; European countries stronger in Middle East than E/SE Asia; China really only achieving penetration in poorer countries (e.g. Philippines, Indonesia, Pakistan, India)
- Opportunities for apple export growth in select Asian markets, as Australia has less than 1% share in the target markets
- Data supports new high value, premium apple opportunities being initially launched in (1) Singapore, (2) Hong Kong and (3) China
- As a “Straw Man” for discussion, we identify a export market roll-out plan

Asian apple imports are rising, with import value growth being driven by expanding tonnage and increasing average FOB (free-on-board) prices

TOTAL IMPORTS TO ASIA/MIDDLE EAST TARGET REGION (24 COUNTRIES)

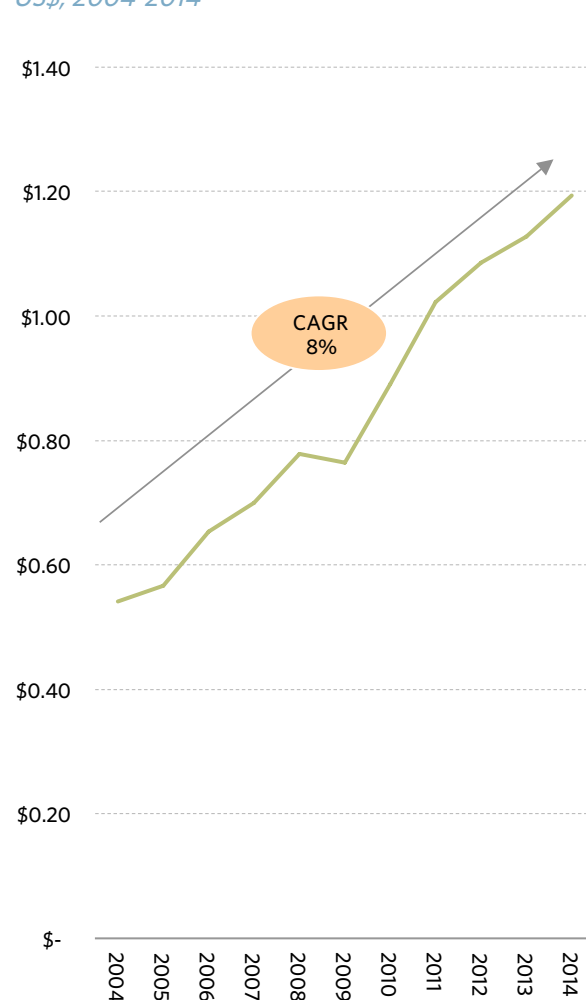
VOLUME

T; 000; 2004-2014



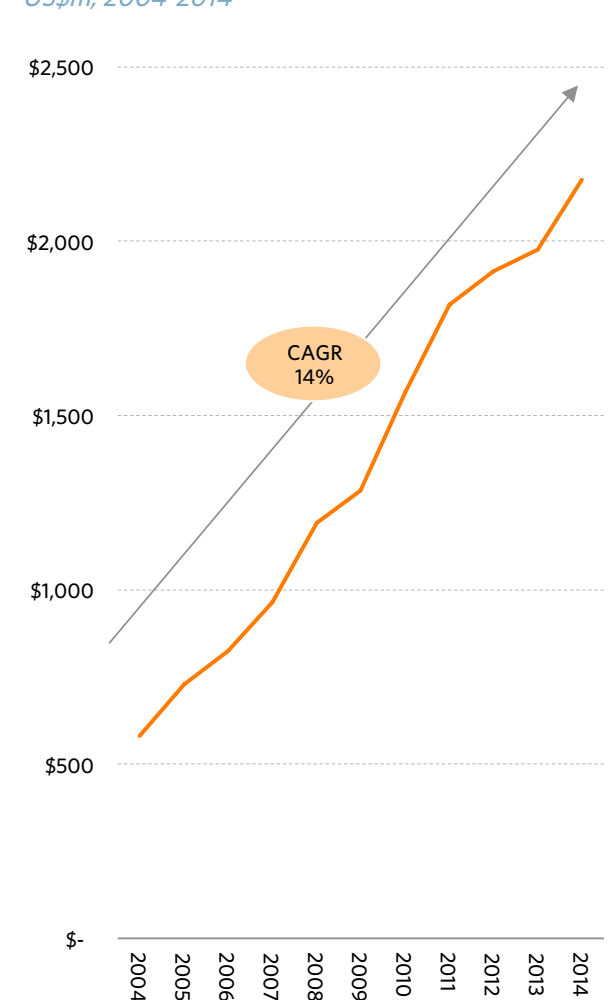
AVERAGE PRICE PER KILOGRAM

US\$; 2004-2014



VALUE

US\$m; 2004-2014



* Compound Annual Growth Rate; Source: UN Comtrade database; Coriolis analysis and classifications

Asian & Middle Eastern apple imports come from three broad regions: Southern Hemisphere (Chile, NZ and South Africa), Western/Northern Hemisphere (USA, Italy, France, and other Europe) and China/other Asia

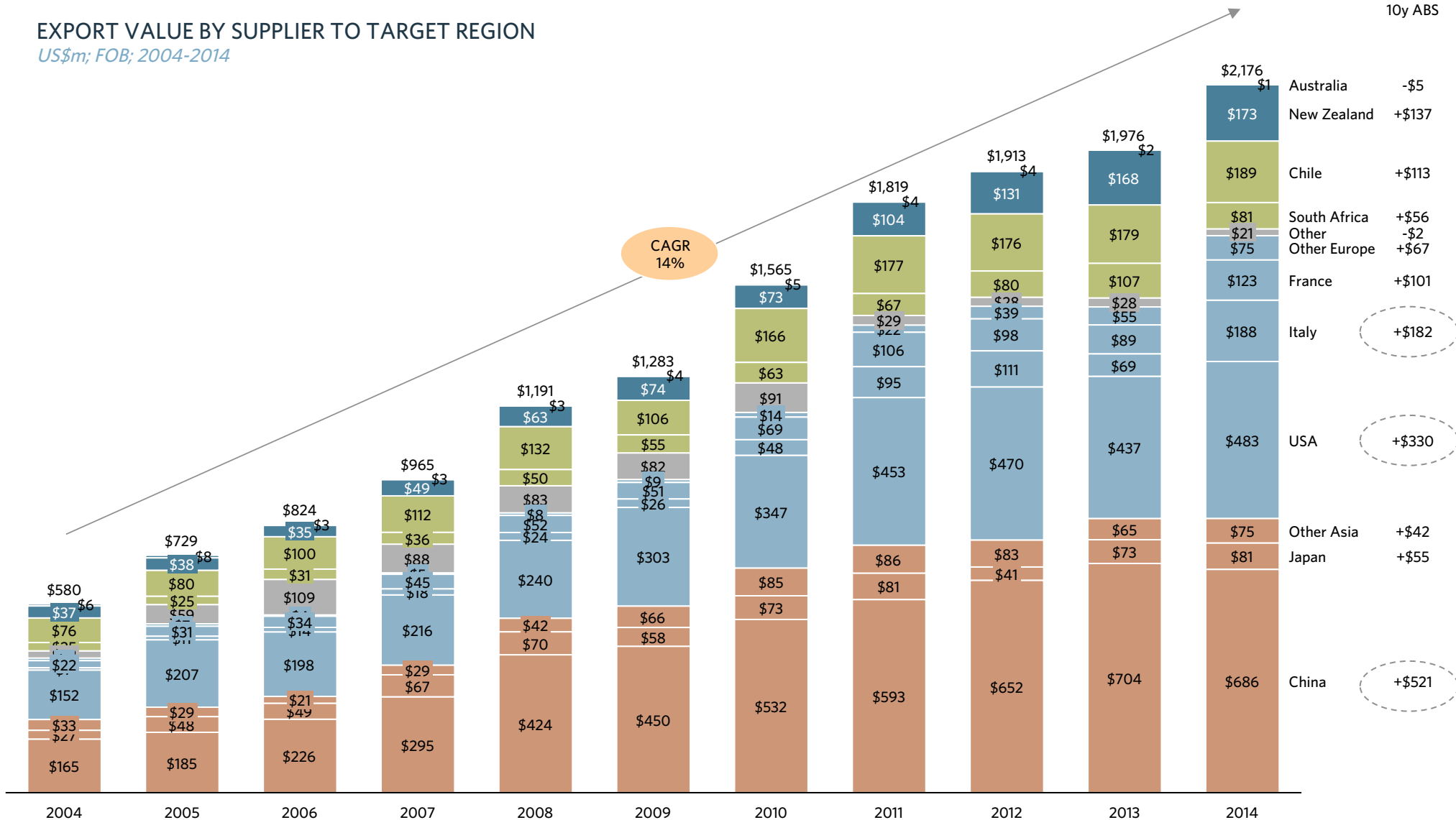


China, the USA and Italy stand out for driving apple import value growth in Asia & the Middle East

EXPORT VALUE BY SUPPLIER TO TARGET REGION

US\$m; FOB; 2004-2014

10y ABS

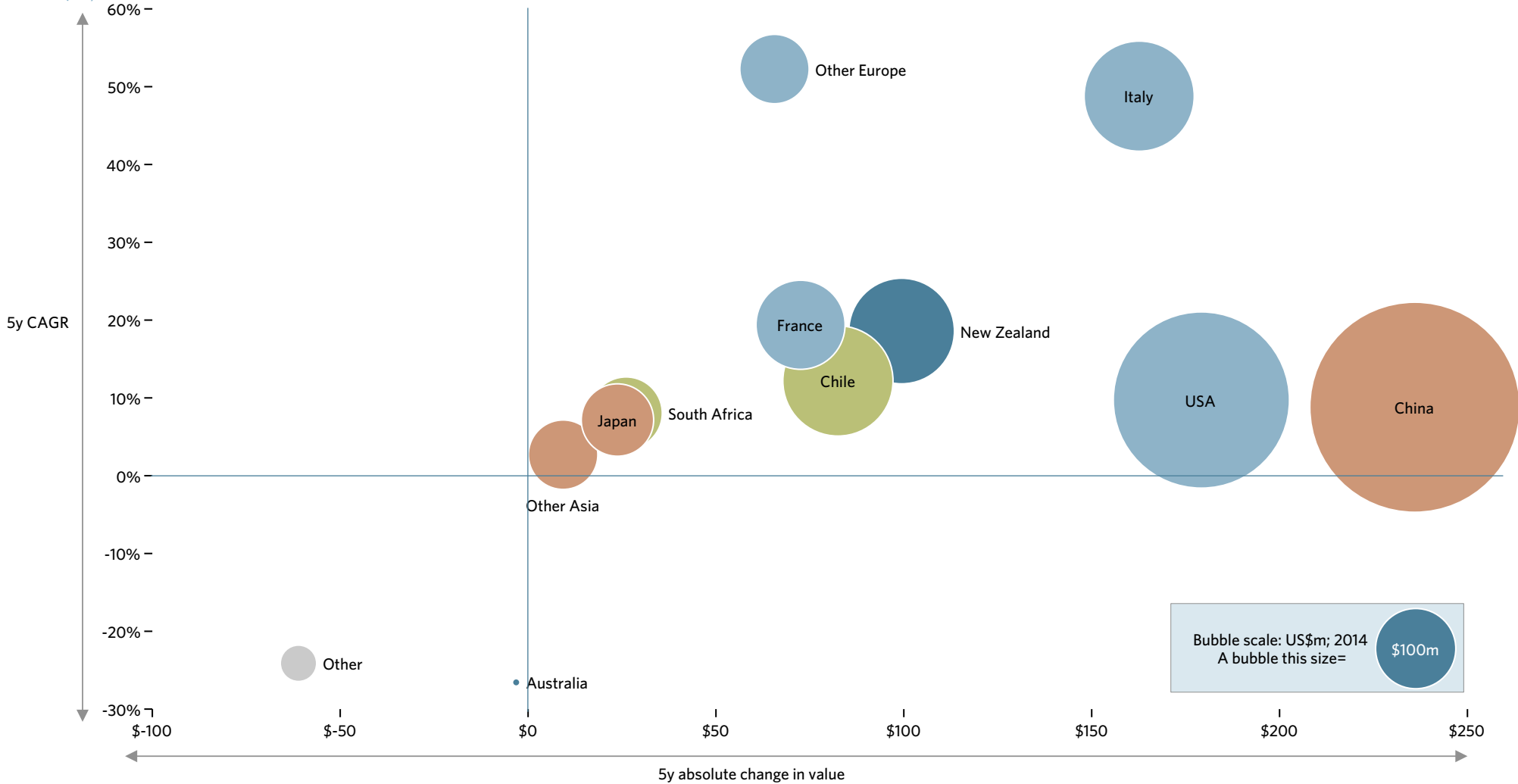


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

China and the USA lead in absolute volume growth, while Italy and “other Europe” lead in rate of growth

FIVE YEAR EXPORT GROWTH MATRIX: CHANGE IN VALUE VS. RATE OF GROWTH VS. ABSOLUTE VALUE

US\$m; 2009 vs. 2014

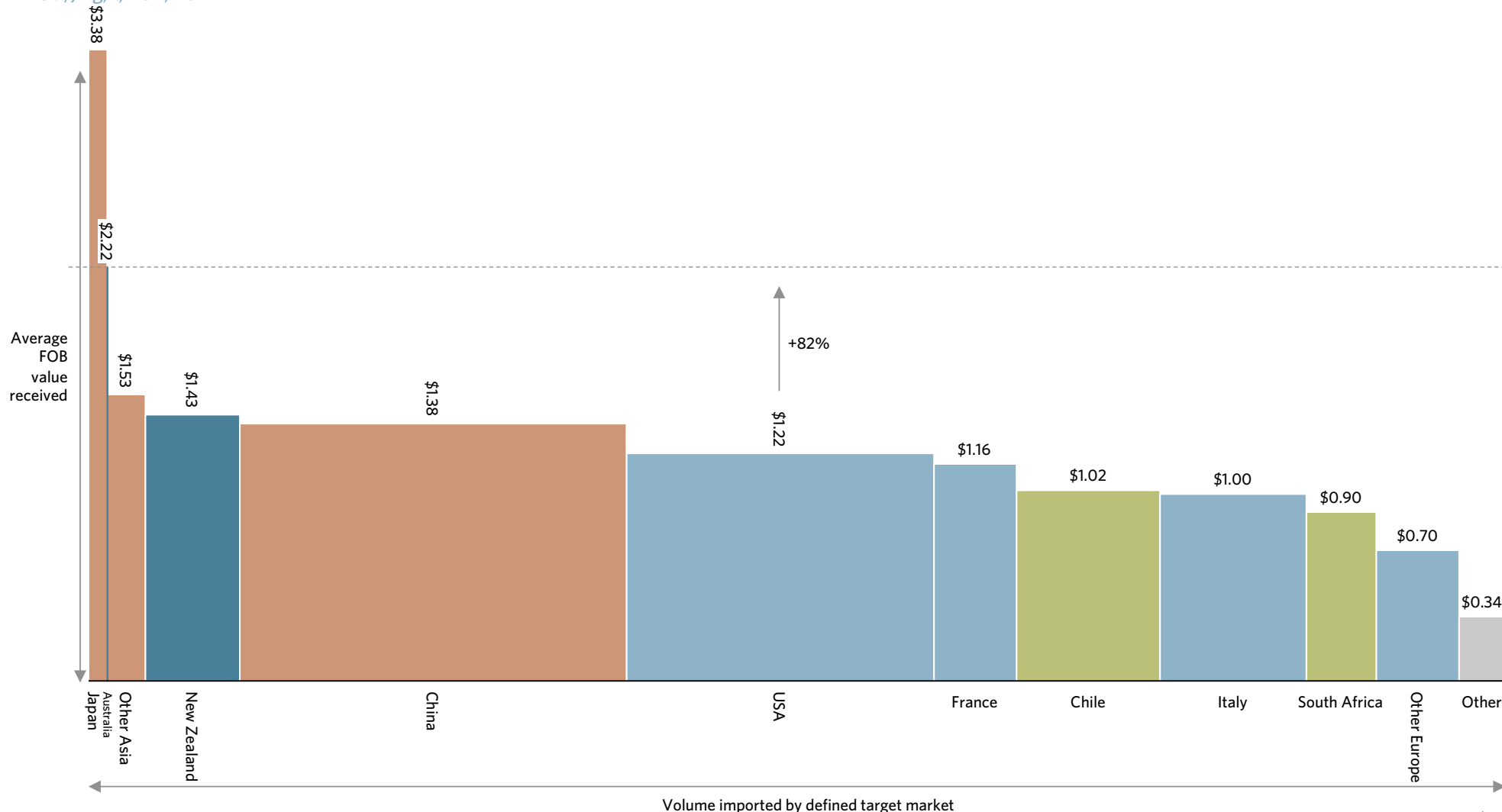


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Average FOB price to target Asian markets vary by supplier, with Japan and Australia standing out for achieving good premiums

AVERAGE EXPORT VALUE COST CURVE BY SUPPLIER

US\$/kg; t; FOB; 2014



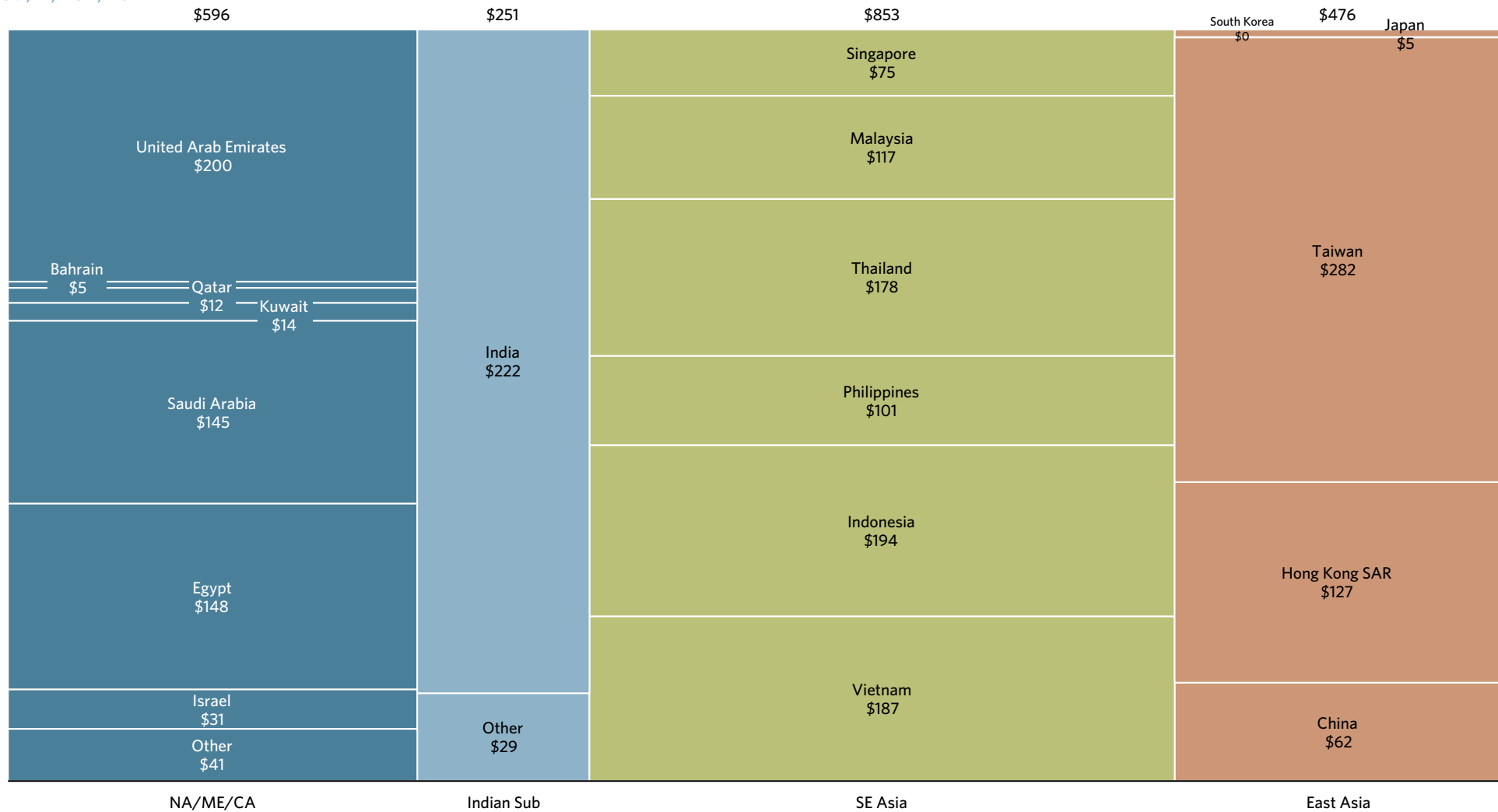
Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Apples go to a wide number of the target markets, with no single country predominating; China is a relatively small importer

IMPORT VALUE BY MARKET BY REGION

US\$m; FOB; 2014

TOTAL = US\$2,176m

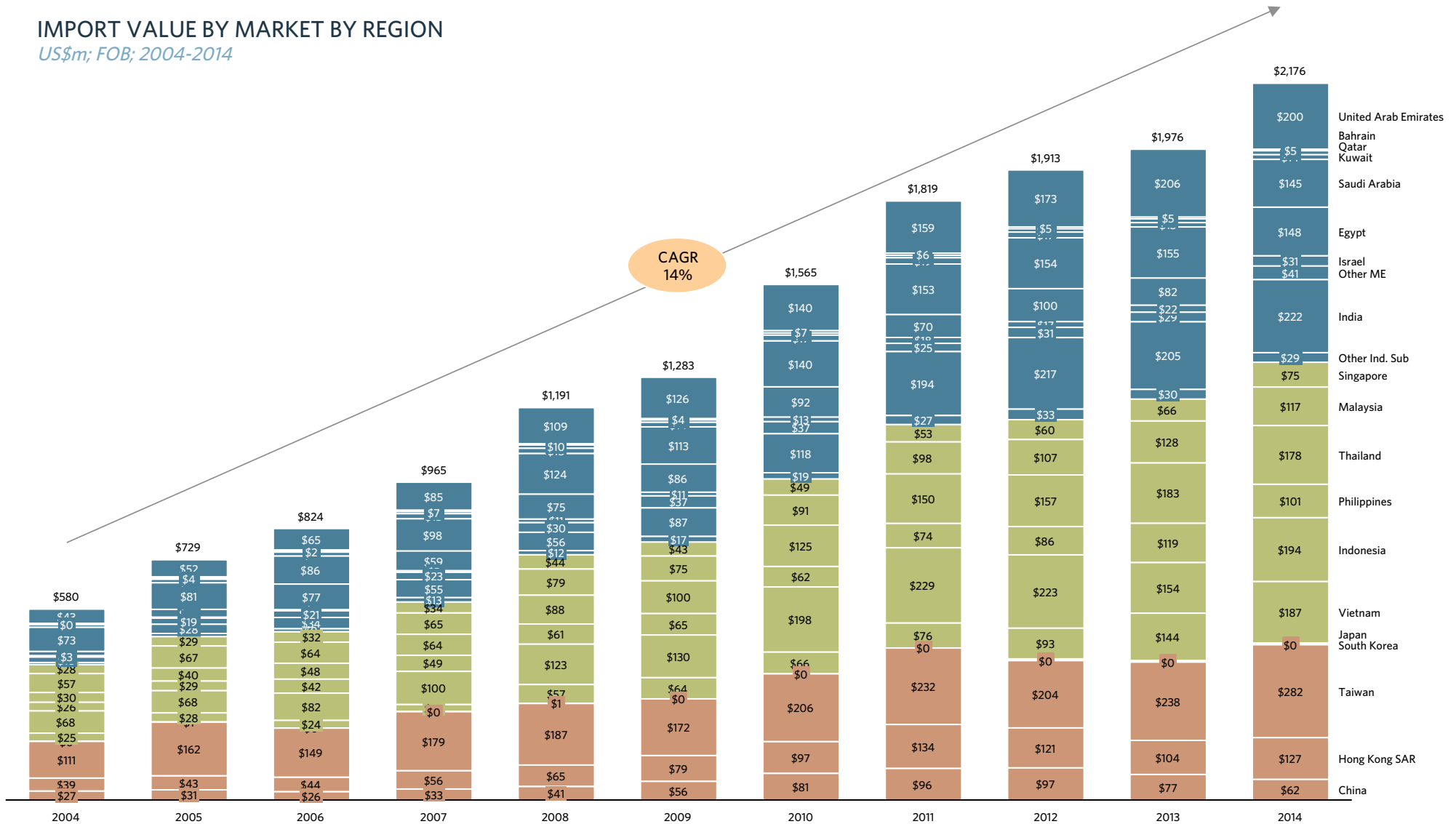


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Growth in apple imports is broad based and coming from across multiple markets

IMPORT VALUE BY MARKET BY REGION

US\$m; FOB; 2004-2014

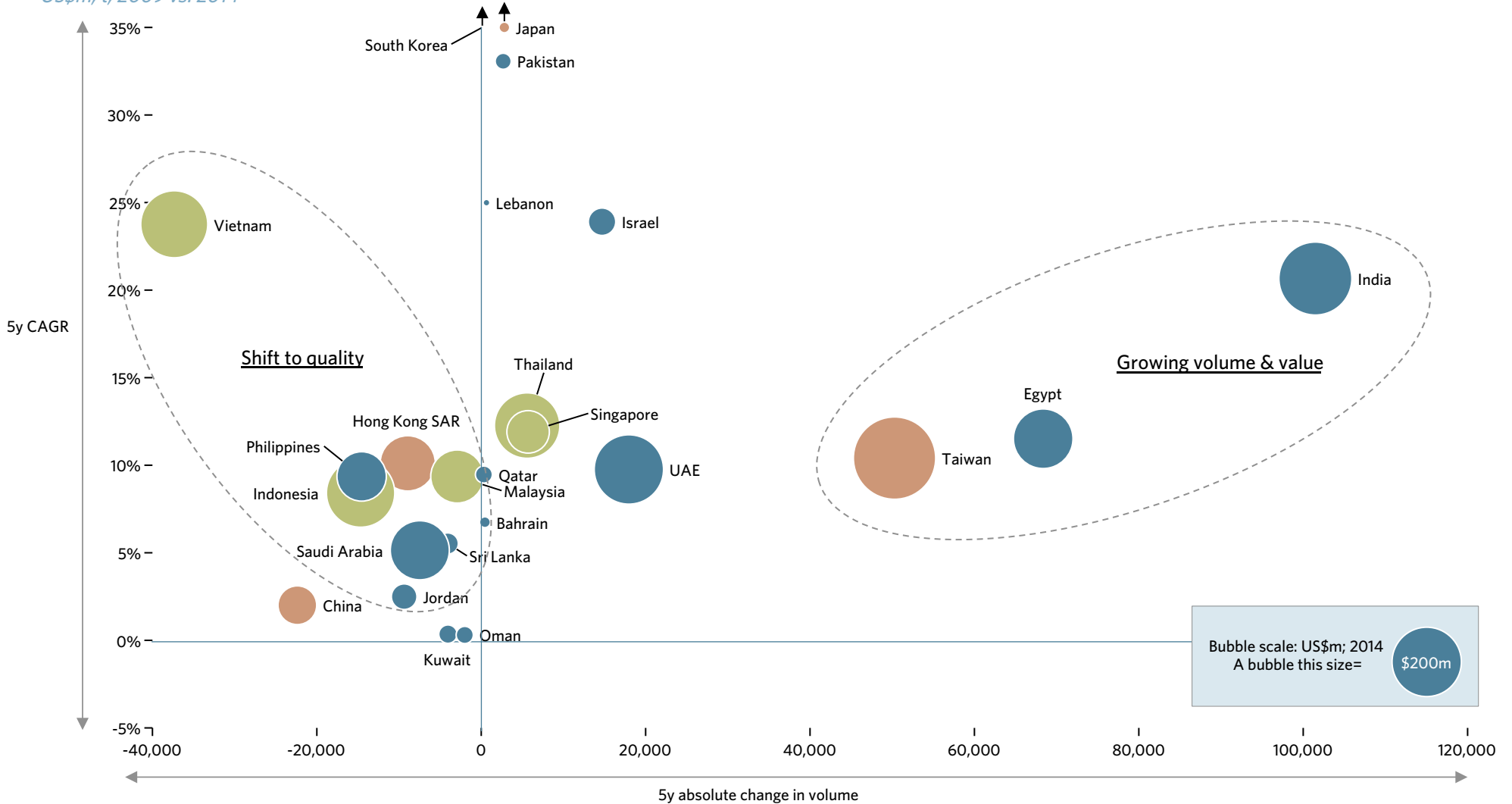


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

India, Egypt and Taiwan stand out for growth; a range of markets have declining volumes but growing value, indicating a move to quality

FIVE YEAR IMPORT GROWTH MATRIX: CHANGE IN VOLUME VS. RATE OF GROWTH VS. ABSOLUTE VALUE

US\$m; t; 2009 vs. 2014

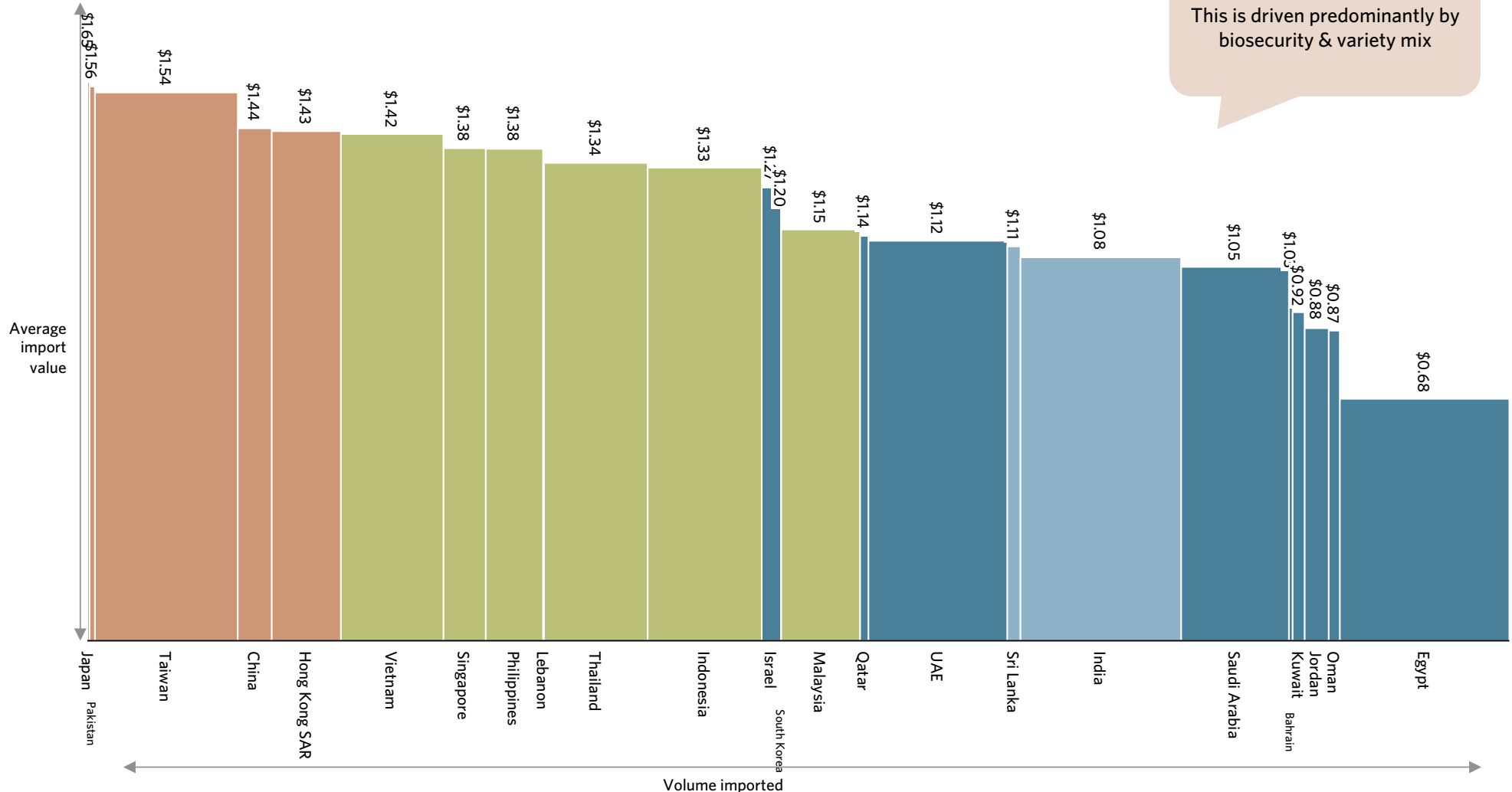


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Average apple import prices vary by region, with East Asia paying more than SE Asia and the Middle East; Taiwan stands out as a large market that pays well

AVERAGE IMPORT VALUE COST CURVE BY MARKET/REGION

US\$/kg; t; FOB; 2014



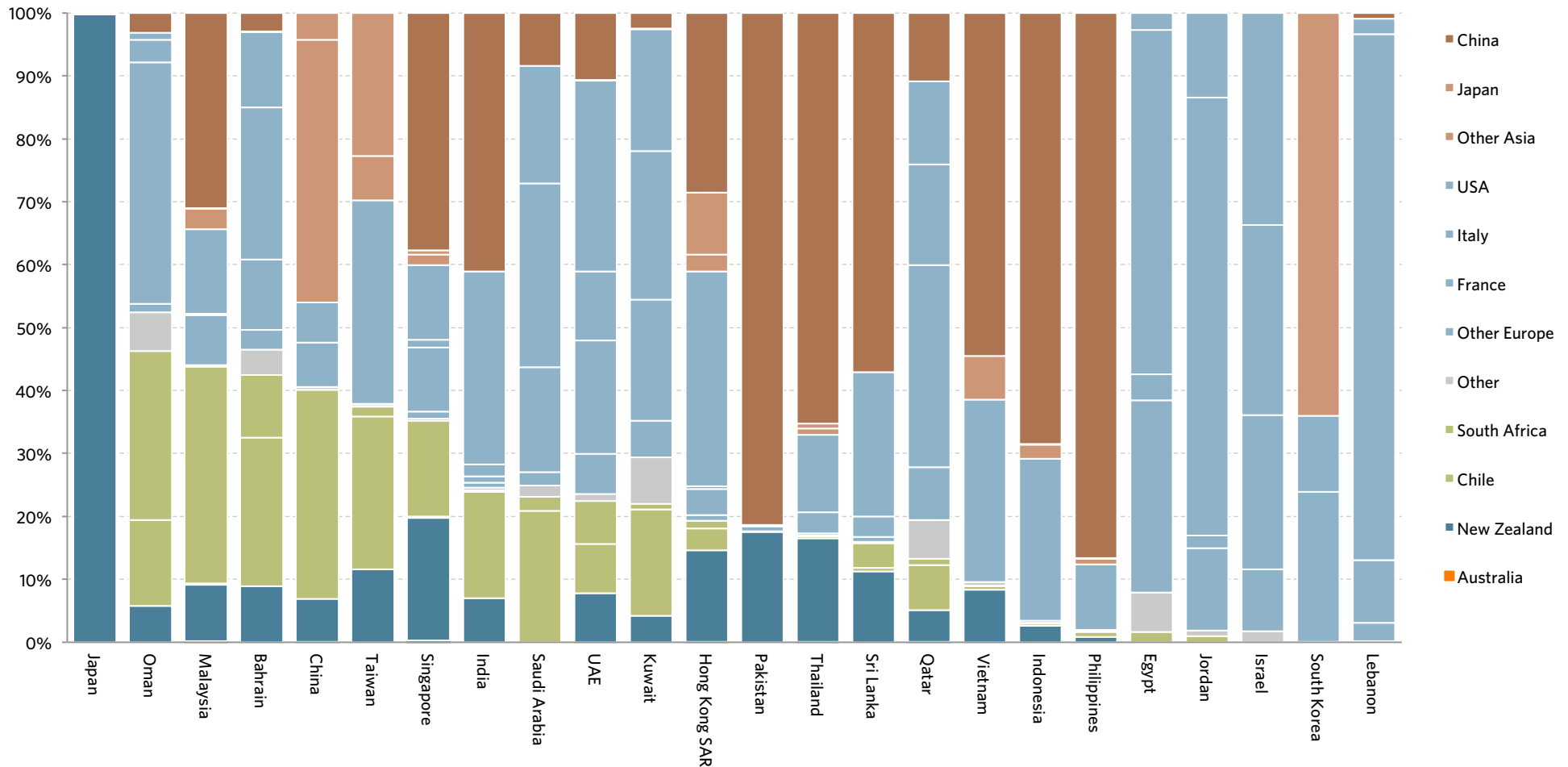
This is driven predominantly by biosecurity & variety mix

Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Market share vary by country; European countries stronger in Middle East than E/SE Asia; China really only achieving penetration in poorer countries (e.g. Philippines, Indonesia, Pakistan, India)

IMPORT VALUE MARKET SHARE BY MARKET BY KEY SUPPLIER

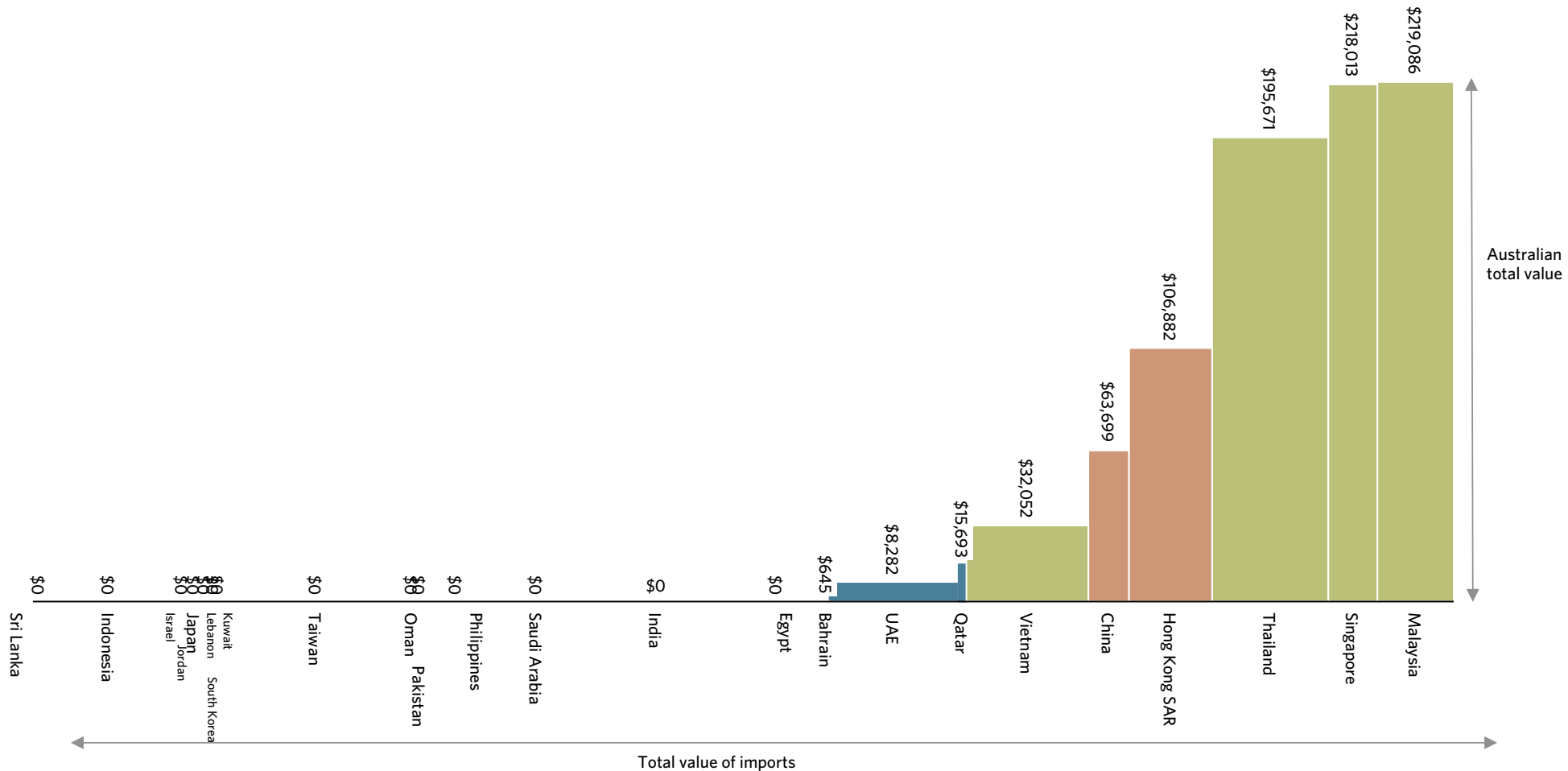
% of value in US\$m; FOB; 2014



Opportunities for apple export growth in select Asian markets as Australia has less than 1% share in the target markets

AUSTRALIAN IMPORT VALUE MARKET VS. MARKET VALUE

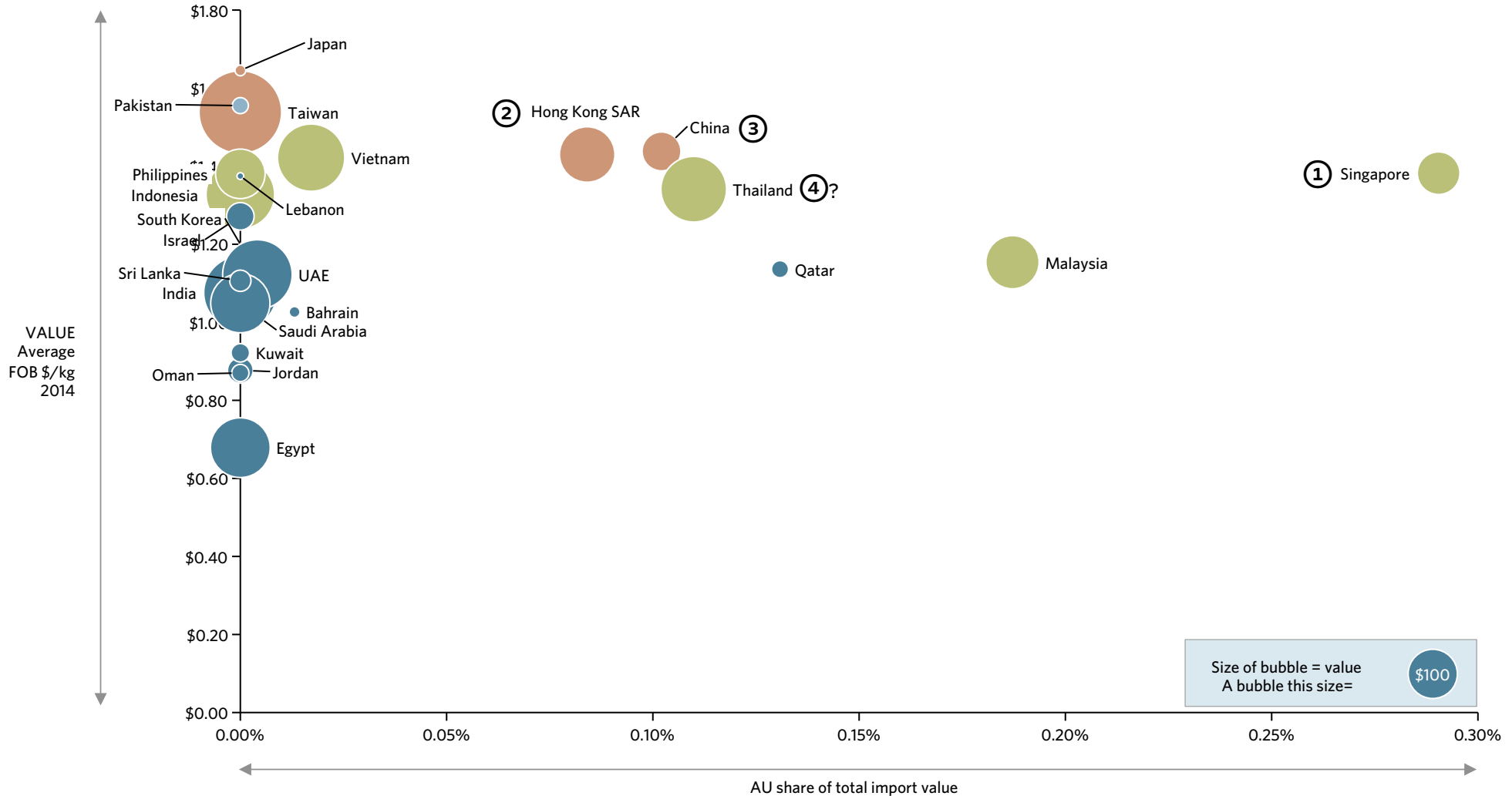
US\$; FOB; 2014



Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Data supports new high value, premium apple opportunities being initially launched in (1) Singapore, (2) Hong Kong and (3) China

WHERE TO FOCUS FOR NEW HIGH VALUE, PREMIUM PRODUCTS: AU SHARE VS. AVERAGE VALUE VS. MARKET SIZE
 % of value; US\$; US\$m; 2014



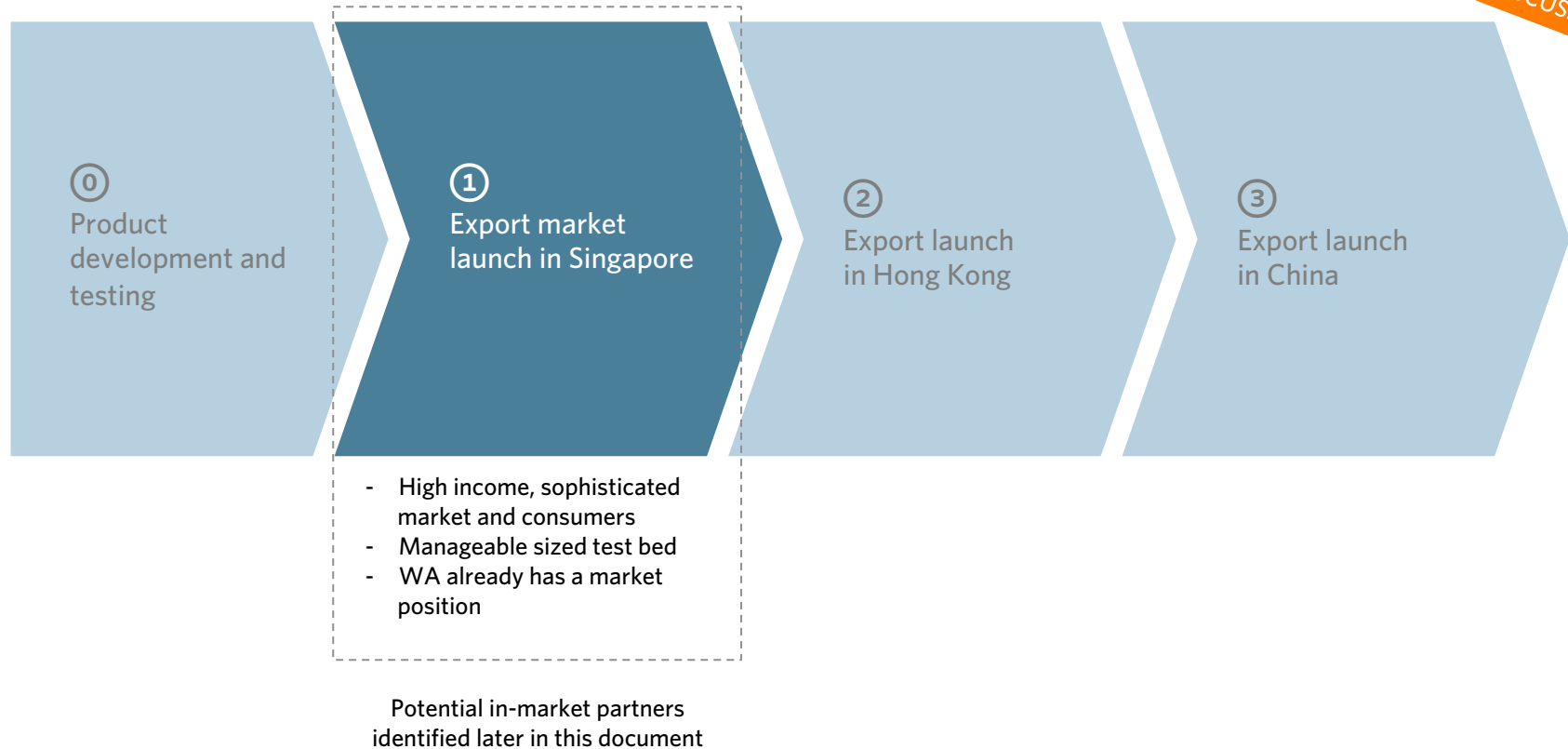
Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

As a "Straw Man" for discussion, we identify a export market roll-out plan

PRELIMINARY "STRAW MAN" DEVELOPMENT & ROLLOUT PLAN FOR APPLE OPPORTUNITY

Model; 2016

THOUGHT STARTER
"STRAW MAN" MODEL
FOR DISCUSSION



DOCUMENT STRUCTURE

What is the strategic situation in the market?

In this environment, what is the opportunity for Western Australia?

Who are the potential in-market partners?

Who are the key firms in Western Australia capable of delivering?



Western Australia has an opportunity to make a strong apple offer to Asia, however innovation will be required

IS THE MARKET DEVELOPED & COMPETITIVE?

- The flow of apples from the farm through to the consumer is relatively straight forward and simple
- In Asia, apple prices are related to variety, and generally higher than in Australia
- Asian markets generally have a much less developed apple range and offer than western countries
- “Leading indicator” Western markets strongly suggest depth of range in Asian apple markets will increase going forward
- While retailers pursue different ranging strategies, most appear to target 5-8 loose apples, with range increases beyond this coming from prepack options; more prepack in “leading indicator” markets
- “Leading indicator” Western markets also strongly suggest Asian apple markets will carry more varieties in the future

WHAT IS WA CAPABLE OF DELIVERING?

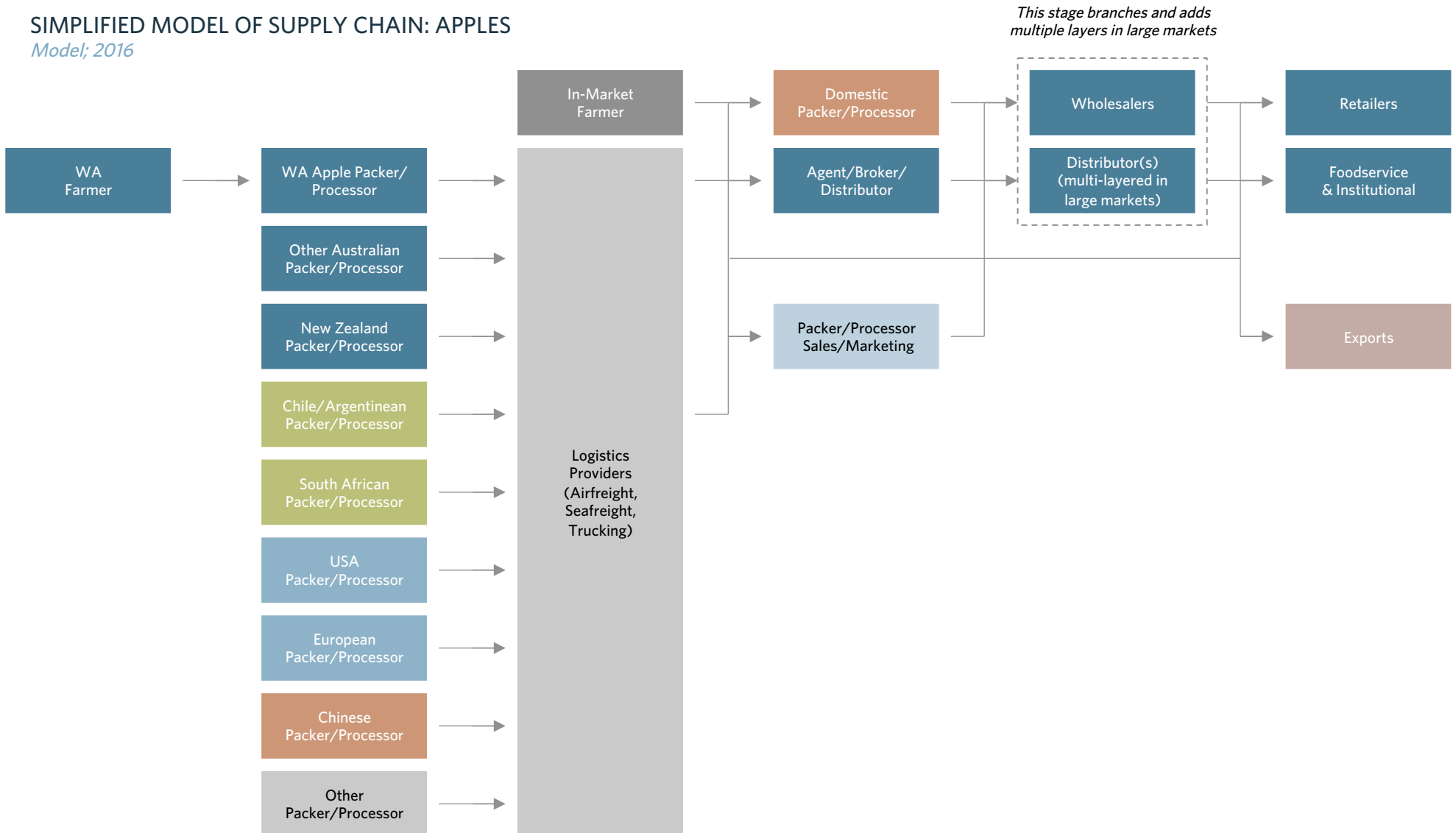
- A wide range of premium, value-adding product attributes emerged from our cross-country retailer survey
- Western Australian apple producers need to continue to move forward and improve through new products
- Multiple potential positions exist to develop a premium apple offer for Asia
- Products from other processors in other markets demonstrate what is possible in terms of developing a premium Western Australian apple offer
- There are a wide range of potential product positions or claims available for a premium apple product from Western Australia targeting Asia
- As a “Straw Man” for discussion, we identify an opportunity for a high value, premium apple product with select characteristics for export market launch

HOW IS THE MARKET STRUCTURED?

The flow of apples from the farm through to the consumer is relatively straight forward and simple

SIMPLIFIED MODEL OF SUPPLY CHAIN: APPLES

Model; 2016



WHO IS THE COMPETITION? PRICING

In Asia, apple prices are related to variety, and generally higher than in Australia

SHELF PRICE PER APPLE ACROSS SELECT SE ASIAN MARKETS AND AUSTRALIA: APPLES

US\$/item; Feb 2016



Source: Coriolis from store checks

WHAT IS ON THE SHELF? RANGE IN MARKET

Asian markets generally have a much less developed apple range and offer than western countries

EXAMPLE: ACTUAL PREPACK APPLE RANGE ON SHELF

Feb 2016

Wegmans

New York: GDP/Capita US\$53,067

 **FairPrice**

Singapore: GDP/Capita \$83,100

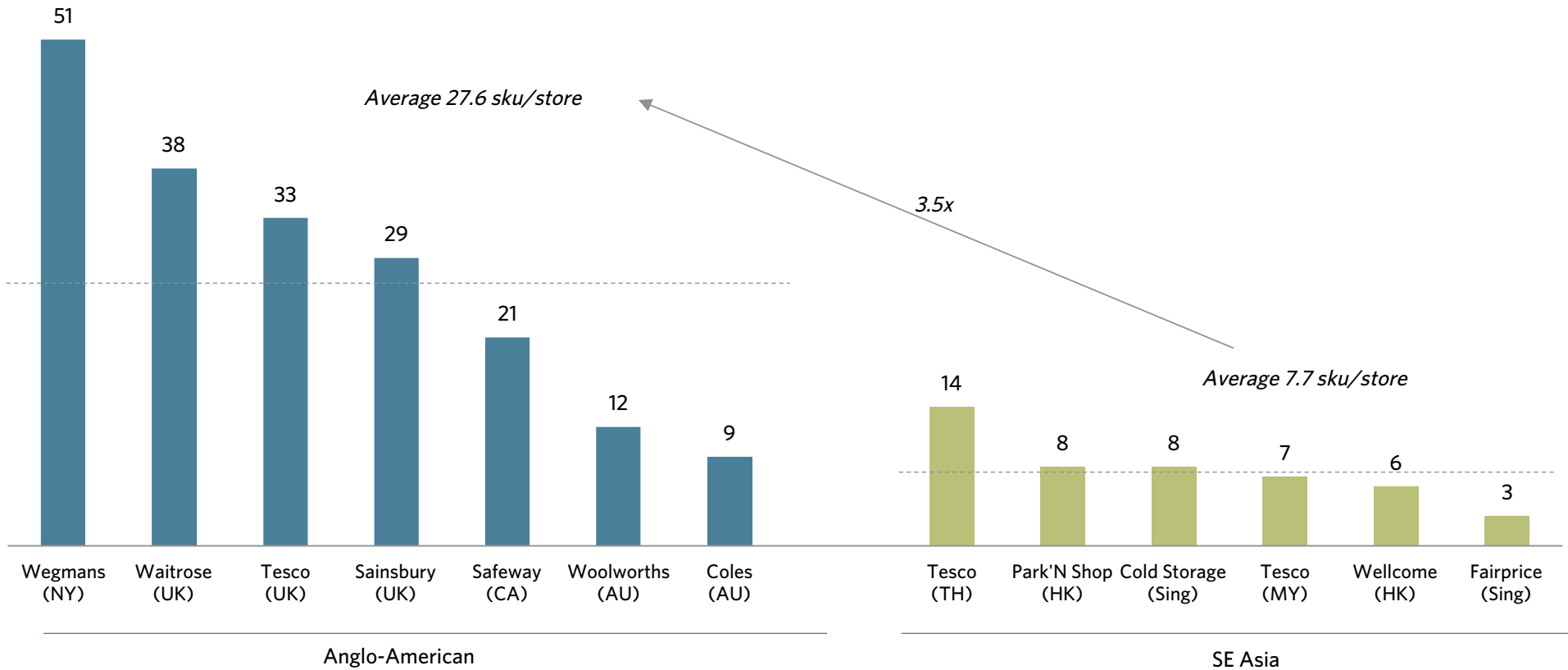


IS THE MARKET DEVELOPED & COMPETITIVE? RANGE

“Leading indicator” Western markets strongly suggest depth of range in Asian apple markets will increase going forward

NUMBER OF LINES ON SHELF: SELECT RETAILERS FROM ACROSS MULTIPLE MARKETS

SKU; actual; Feb 2016

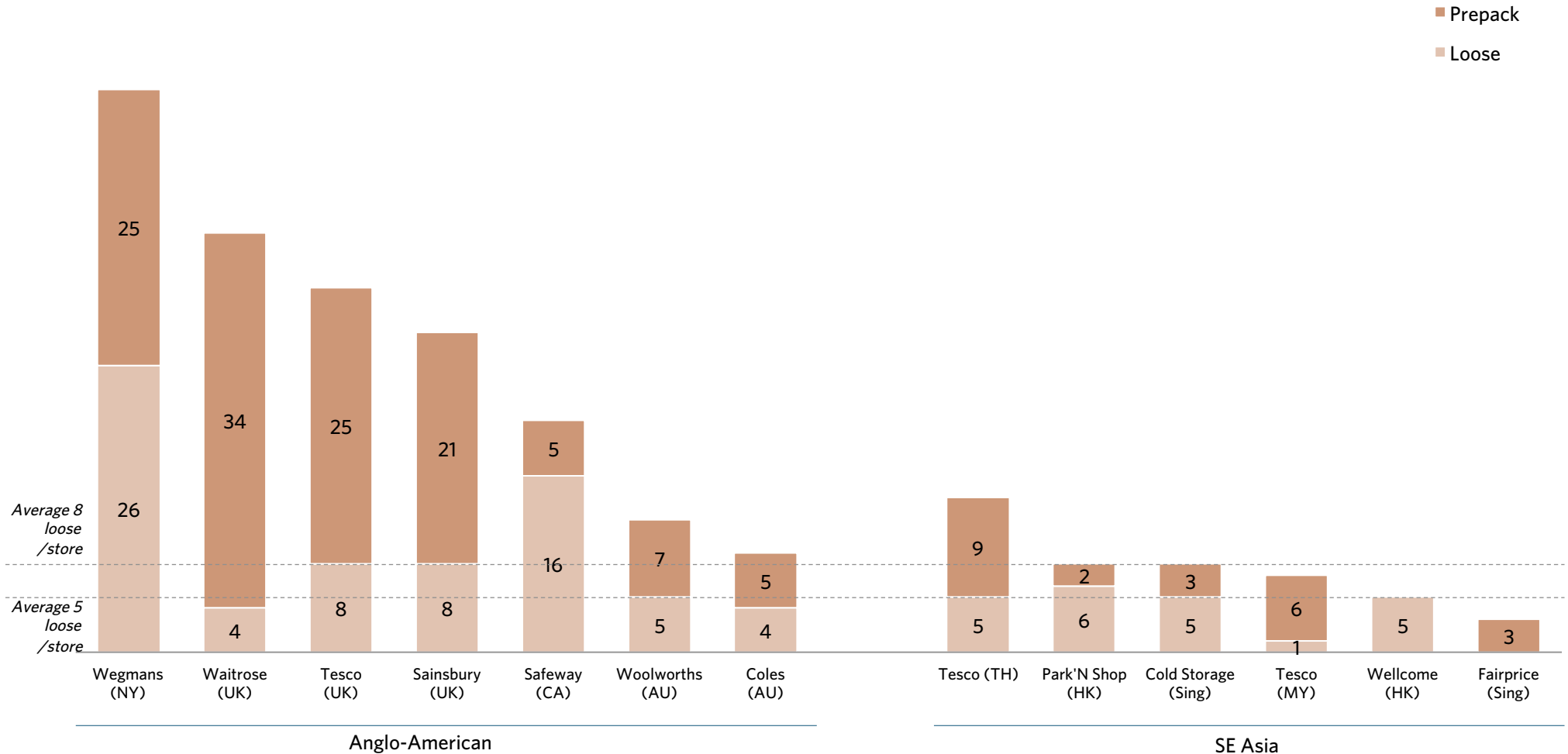


IS THE MARKET DEVELOPED & COMPETITIVE? SEGMENTATION

While retailers pursue different ranging strategies, most appear to target 5-8 loose apples, with range increases beyond this coming from prepack options; more prepack in “leading indicator” markets

NUMBER OF LINES ON SHELF BY PACK FORM: SELECT RETAILERS FROM ACROSS MULTIPLE MARKETS

SKU; actual; Feb 2016



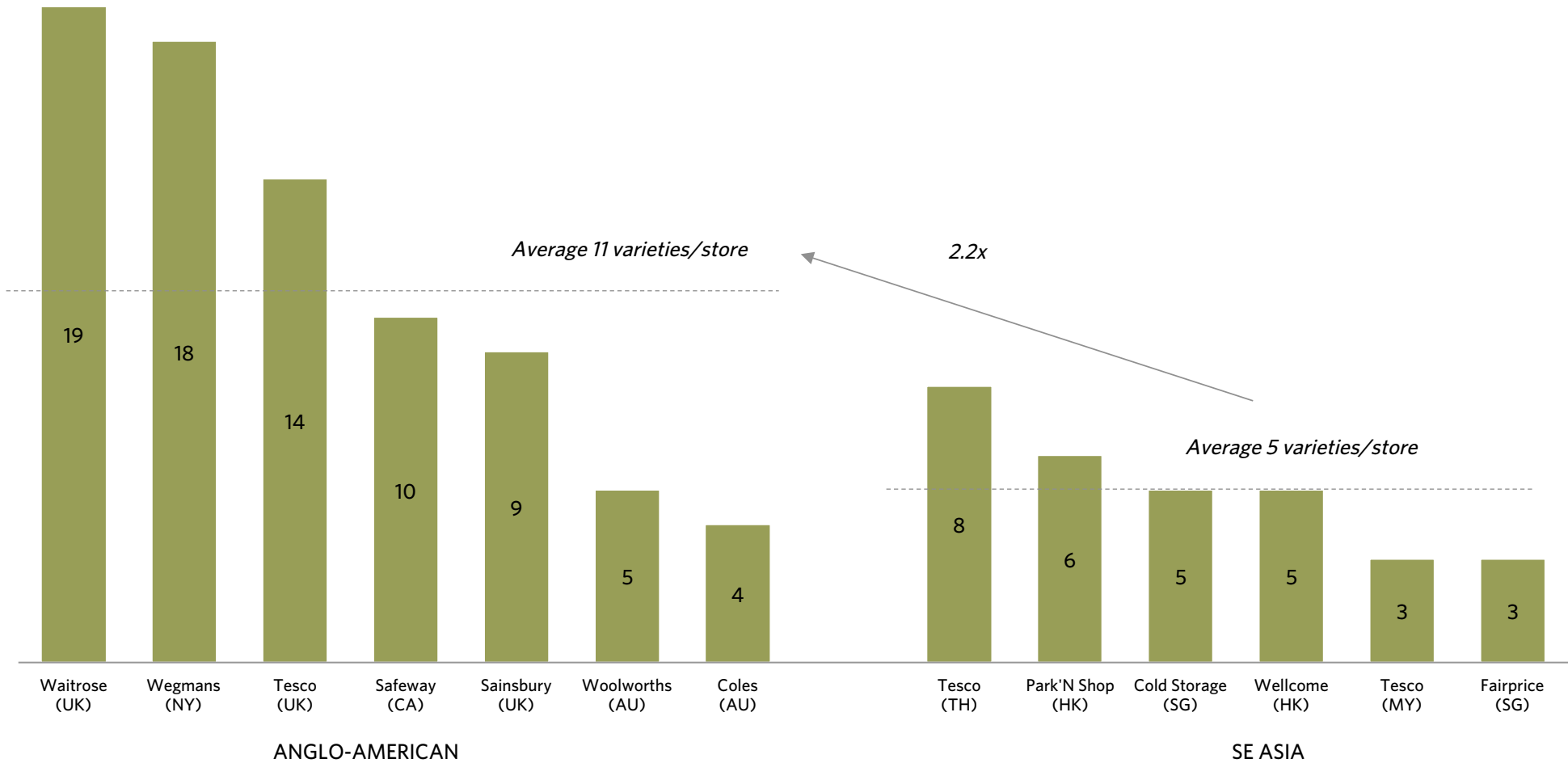
Source: Coriolis from store checks

IS THE MARKET DEVELOPED & COMPETITIVE? SEGMENTATION

“Leading indicator” Western markets also strongly suggest Asian apple markets will carry more varieties in the future

NUMBER OF DIFFERENT VARIETIES OF APPLE ON SHELF: SELECT RETAILERS FROM ACROSS MULTIPLE MARKETS

of varieties; actual; Feb 2016

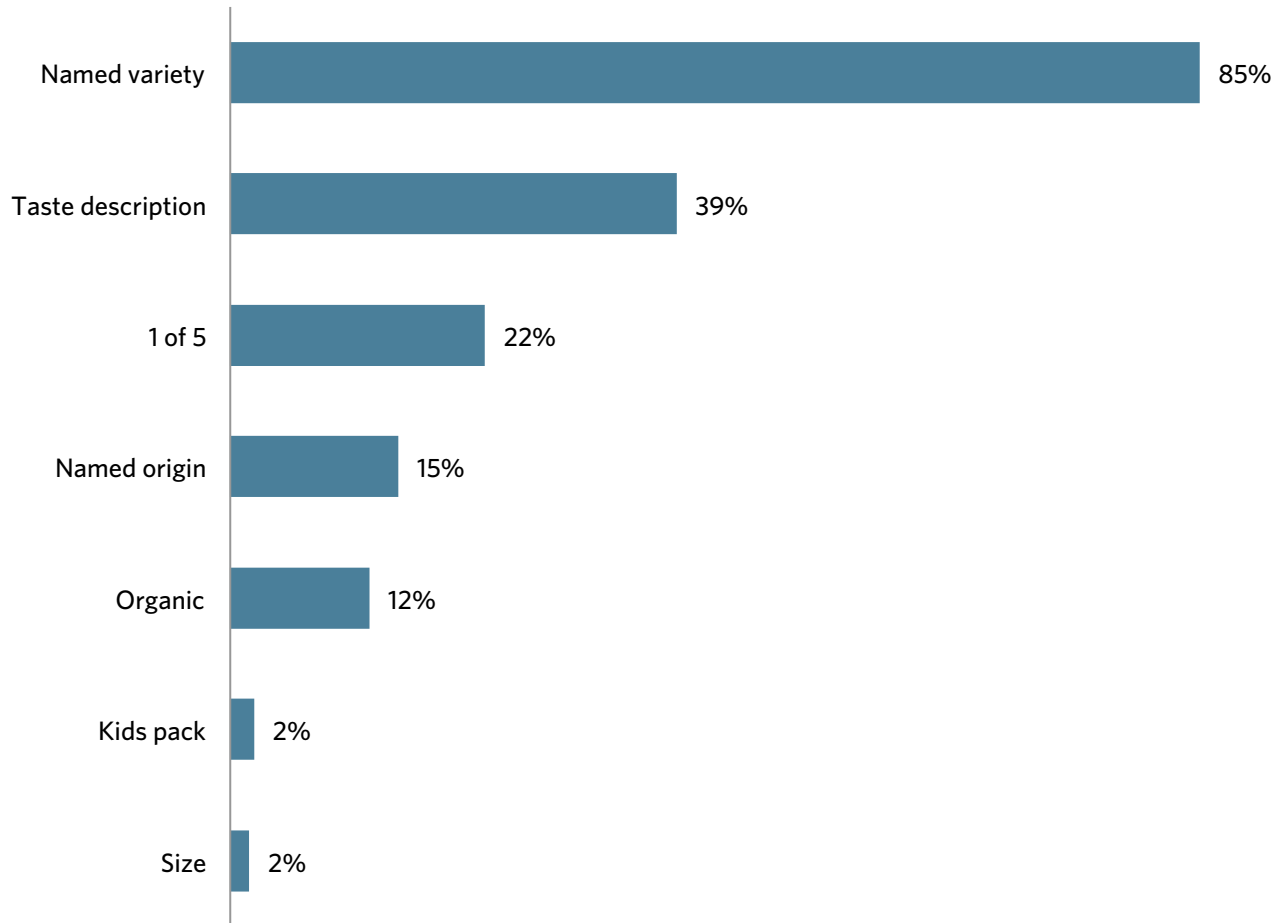


IS THE MARKET DEVELOPED & COMPETITIVE? PRODUCT ATTRIBUTES

A wide range of premium, value-adding product attributes emerged from our cross-country retailer survey

PERCENT OF OBSERVED PRODUCTS ON SHELF MAKING THE CLAIM ON PACK

% of SKU; N=239; Feb 2016



TAKEAWAYS

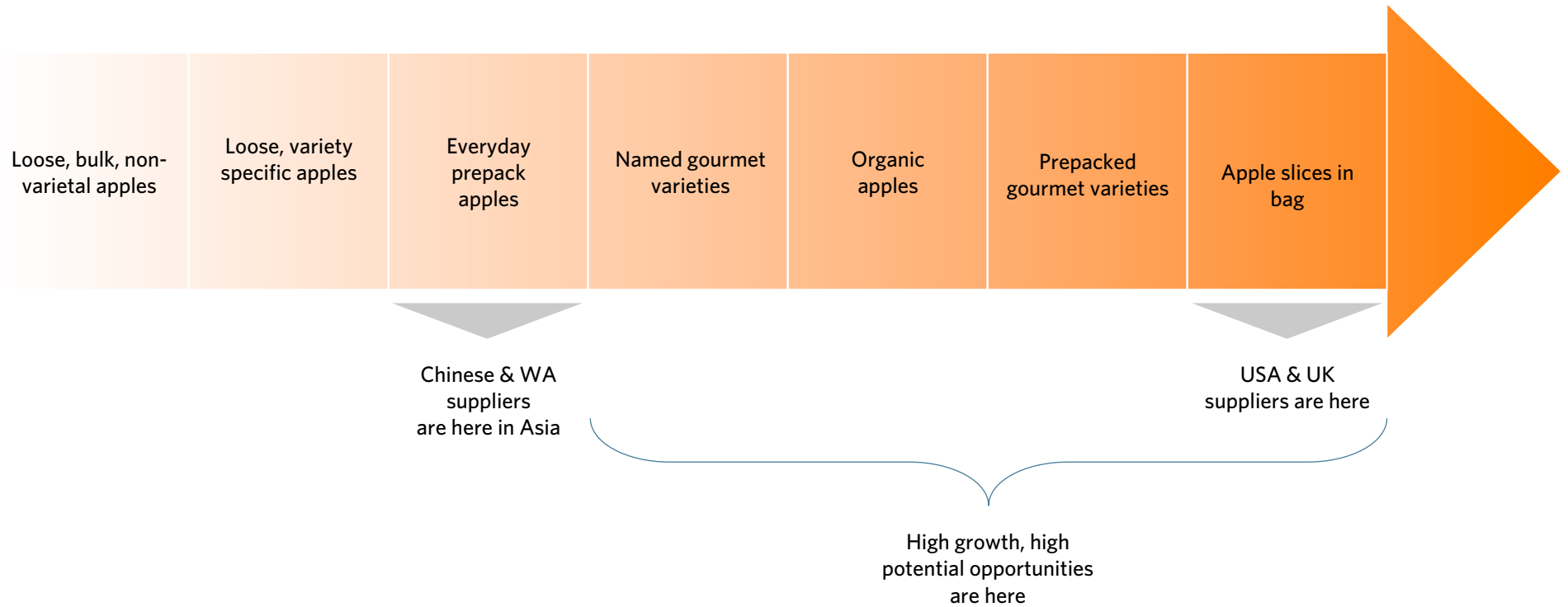
- This provide very clear instruction on what product attributes are succeeding the most across markets
- Western Australian apple producers looking to grow value and share should focus in these areas
- Specifying the variety stands out, with 85% observed product SKU naming the apple variety
- Survey universe is all products in all listed retailers (across multiple countries)

WHAT IS WA CAPABLE OF DELIVERING? STRATEGIC DIRECTION

Western Australian apple producers need to continue to move forward and improve through new products

SUGGESTED STRATEGIC DIRECTION: WESTERN AUSTRALIAN APPLES

Model; 2016



WHAT IS WA CAPABLE OF DELIVERING? CLAIMS

Multiple potential positions exist to develop a premium apple offer for Asia

IDENTIFIED POTENTIAL PREMIUM POSITIONS

Model; 2016



Heart healthy

High in antioxidants

Aids production of saliva

Brain health

High in flavonoids

Promotes dental health

Reduces risk of cancer

High in fibre

Digestive health

Organic

Identified source region

Specialty variety

Track & trace

Gourmet varieties

Gift packs

Kid friendly characters

Lunchbox packs

Kid sized apples

Sliced in bag

Prewashed

WHAT IS WA CAPABLE OF DELIVERING? GLOBAL PEERS

Products from other processors in other markets demonstrate what is possible in terms of developing a premium Western Australian apple offer

EXAMPLES OF PREMIUM PRODUCTS FROM OTHER MARKETS

Select; 2016



- Product of Japan
- Distinctive packaging
- Contrasting colours
- Named varieties

- Cleaned & cut
- Snack Pack
- Nutrition panel
- Convenient
- Healthy
- 1 of 5 a day

- IP protected variety
- Product of NZ
- "Sweet desire"
- Striking packaging
- Convenient packaging
- "Bite & believe"
- Backed by marketing campaign
- Deep red colour

- Organic
- Pink Lady
- Fizzy & Sweet
- Love Life
- 1 of 5 a day
- Donation to charity from sales

WHAT IS A POTENTIAL WA OFFER?

There are a wide range of potential product positions or claims available for a premium apple product from Western Australia targeting Asia

HYPOTHETICAL EXAMPLE OF POTENTIAL PREMIUM PRODUCT FROM WA

Model; 2016



High in antioxidants

High in fibre

Good for digestive health



From Western Australia

Organic

Australian Flag



Unique variety

Attractive packaging



Sliced snack pack

WHAT IS THE IDENTIFIED OPPORTUNITY?

As a "Straw Man" for discussion, we identify an opportunity for a high value, premium apple product with select characteristics for export market launch

THOUGHT STARTER
"STRAW MAN" MODEL
FOR DISCUSSION

PRELIMINARY "STRAW MAN" DEVELOPMENT & ROLLOUT PLAN FOR APPLE OPPORTUNITY

Model; 2016

CURRENT WA POSITIONING IN ASIA



IDENTIFIED HIGH GROWTH, HIGH VALUE OPPORTUNITY FOR WA



POTENTIAL FUTURE PRODUCT LINE EXTENSION



Prepack

From Australia

From Western Australia

Organic

Unique variety

Attractive packaging

Australian Flag

High in fibre

Deep red colour

High in antioxidants

1 of 5 a day

Gift pack

DOCUMENT STRUCTURE

What is the strategic situation in the market?

In this environment, what is the opportunity for Western Australia?

Who are the potential in-market partners?

Who are the key firms in Western Australia capable of delivering?

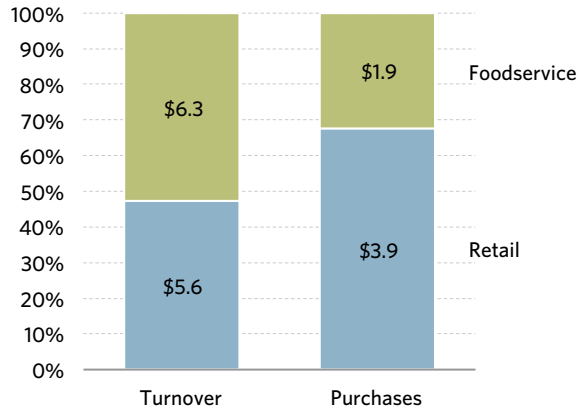


FOCUS MARKET - 1 - SINGAPORE

Singapore has a robust and well-developed food retailing and foodservice sector

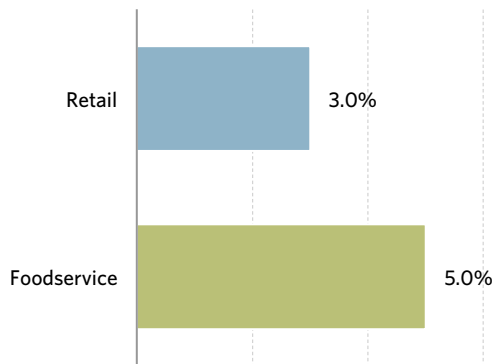
TURNOVER & PURCHASES

US\$b; 2014



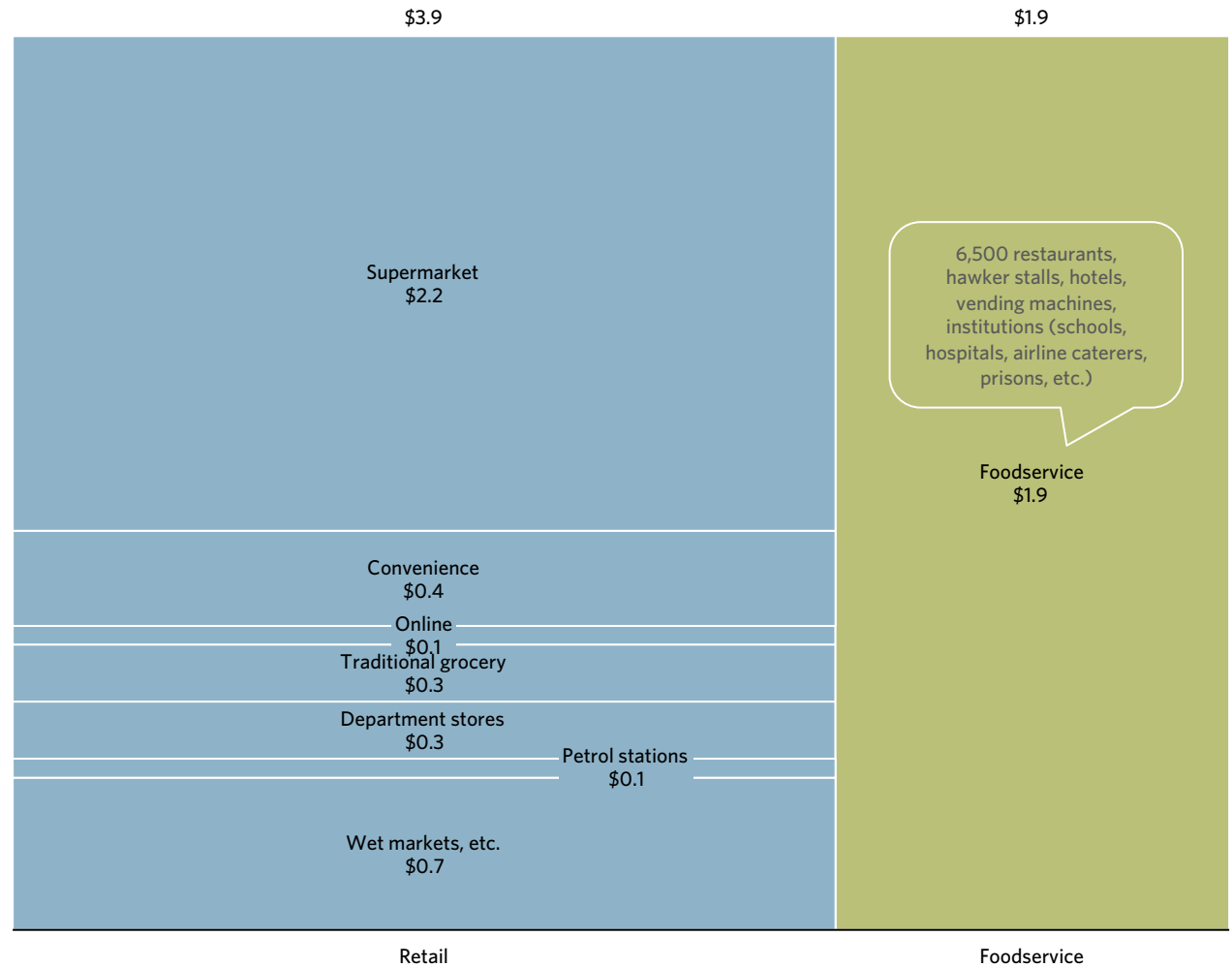
TURNOVER GROWTH RATE

% Y-O-Y; S\$; 2013v2014



ESTIMATED WHOLESALE FOOD & FMCG PURCHASES

US\$b; 2014



FOCUS MARKET - 1 - SINGAPORE

Four potential in-market partners are identified for Western Australian firms in Singapore

POTENTIAL IN-MARKET PARTNERS - SINGAPORE

2015 or as available

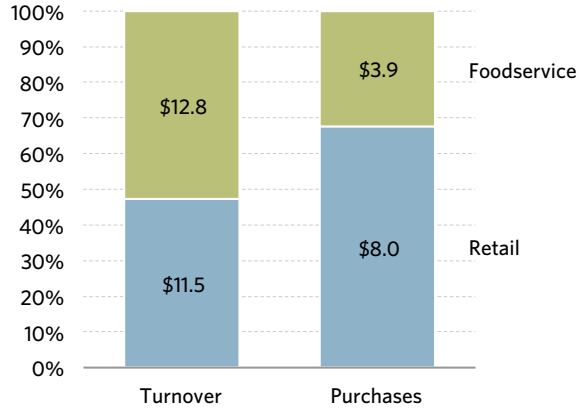
				
Firm	NTUC Fairprice	Cold Storage	Sheng Siong	Prime Supermarkets
Ownership	National Trade Union Council (Singapore)	Dairy Farm International (Hong Kong)	Listed; Singapore	Private; Singapore
Website	www.fairprice.com.sg www.ntuc.org.sg	www.coldstorage.com.sg www.dairyfarmgroup.com	www.shengsiong.com.sg www.allforyou.sg	www.primesupermarket.com
Annual sales	US\$1.83b	US\$1.55b	US\$0.55b	US\$0.2b
Store formats	Supermarket Hypermarket Convenience (Cheers; 139) Online	Supermarket (Cold Storage, Marketplace) Hypermarket Convenience (7-Eleven; 502) Online	Supermarkets Online	Supermarkets
# of stores	285	848	38	19
Store fascia				

FOCUS MARKET - 2 - HONG KONG

Hong Kong has a robust and well-developed food retailing and foodservice sector

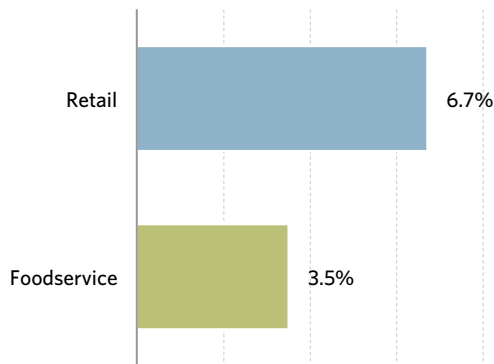
TURNOVER & PURCHASES

US\$b; 2014



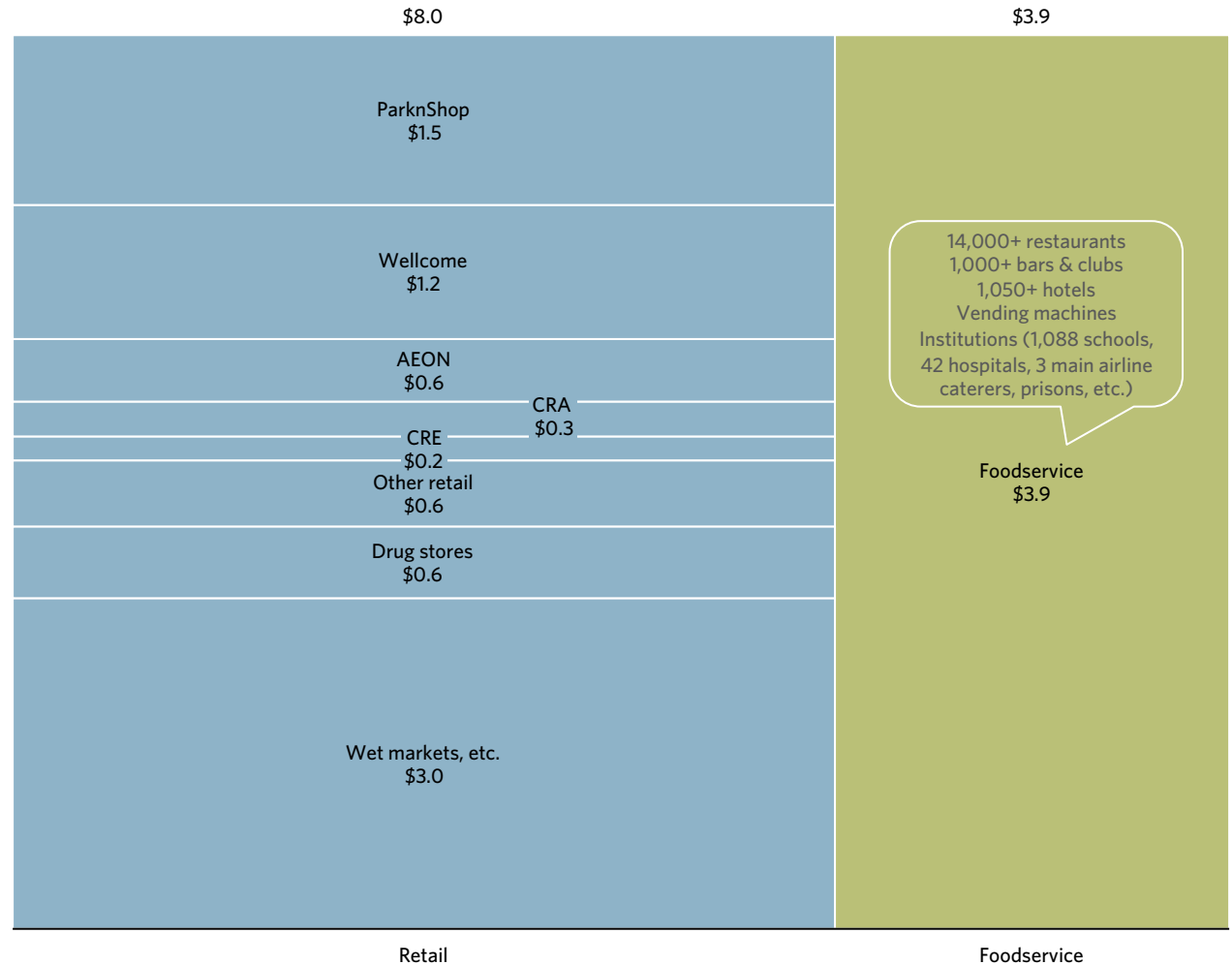
TURNOVER GROWTH RATE

% Y-O-Y; HK\$; 2013v2014



ESTIMATED WHOLESALE FOOD & FMCG PURCHASES

US\$b; 2014



FOCUS MARKET - 2 - HONG KONG

Seven potential in-market partners are identified for Western Australian firms in Hong Kong

POTENTIAL IN-MARKET PARTNERS - HONG KONG

2015 or as available

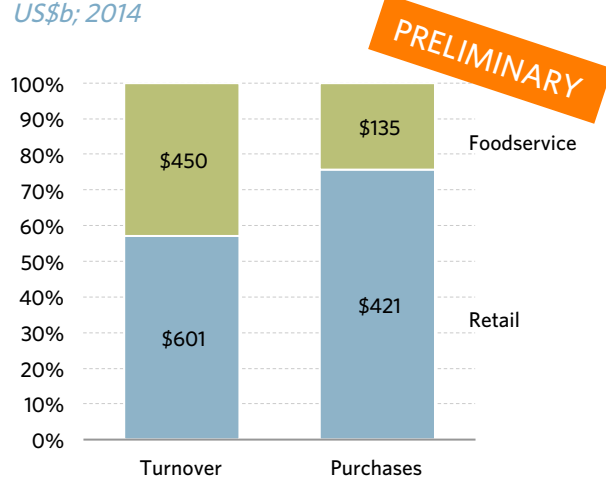
							
Firm	Wellcome	Park'N Shop	CR Vanguard	Dah Chong Hong	759 Stores	AEON Stores	Convenience Retail Asia
Ownership	Dairy Farm International/Jardine Matheson	A.S. Watson/Hutchison Whampoa	CRE/China Resources (SOE; China)	Dah Chong Hong/CITIC Pacific/CITIC (SOE; China)	Private; Hong Kong (Lam Wai Chun)	AEON (Japan)	Fung Group
Website	www.wellcome.com.hk	www.parknshop.com	www.crvanguard.com.hk www.crc.com.cn	www.dch.com.hk	www.759store.com	www.aeonstores.com.hk www.aeon.info	www.circlek.hk/en www.cr-asia.com
Annual sales (in HK)	\$2.2b+	\$2.8b	~\$0.8b (food/FMCG)	N/A	N/A	\$0.8b	\$0.4b
Food store formats	Supermarkets 318 Convenience 921 Health & Beauty 369 Restaurants 676	Supermarkets 260+ Convenience	Supermarkets Convenience	Supermarkets	Grocery 247+	Dept. stores (w/food) 8 Supermarkets 5	Convenience 600+ Bakery
# of stores	Wellcome 280+ Marketplace 31 7-Eleven 900+ Olivers the Delicatessen ThreeSixty	ParknShop 175 PnS Superstore 50+ PnS Taste 10 PnS Fusion 14	CR Vanguard 100+ VanGo 79	DCH Food Mart 80+ DCH Food Mart Deluxe	759 Stores 247+	AEON 13	Circle K Saint Honore Cake
Store fascia	 		 	 			 

FOCUS MARKET - 3 - CHINA

China has a robust and well-developed food retailing and foodservice sector

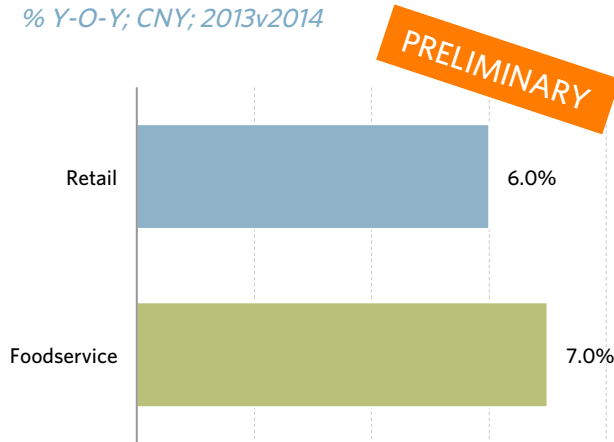
TURNOVER & PURCHASES

US\$b; 2014



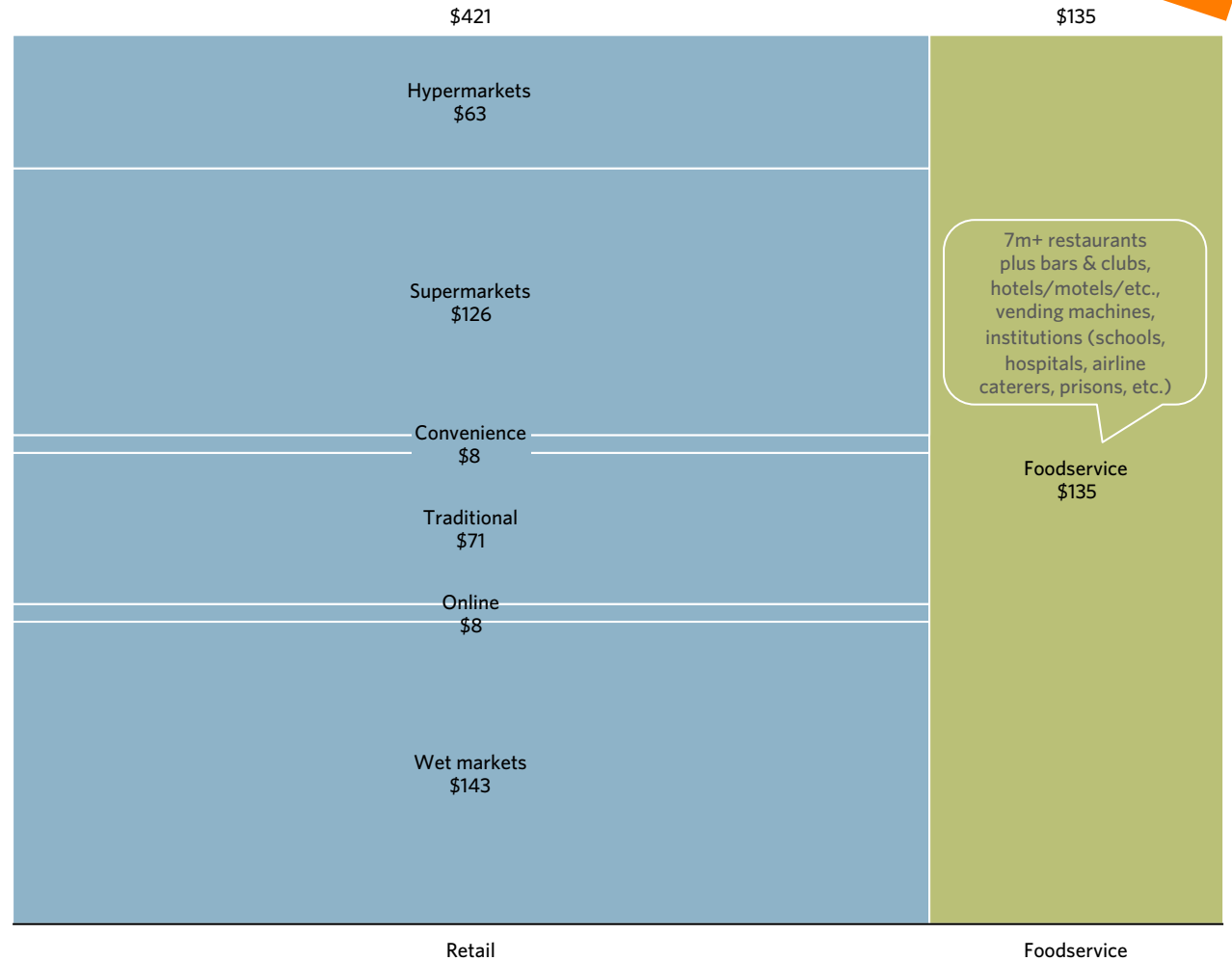
TURNOVER GROWTH RATE

% Y-O-Y; CNY; 2013v2014



ESTIMATED WHOLESALE FOOD & FMCG PURCHASES

US\$b; 2014



FOCUS MARKET - 3 - CHINA

Eighteen potential in-market partners are identified for Western Australian firms in China...

POTENTIAL IN-MARKET PARTNERS - CHINA

2015 or as available

							
Firm	CR Vanguard	Sun Art Retail Group	Wal-Mart China	Lianhua	Carrefour China	Yonghui Superstores	Nonggongshang
Ownership	China Resources (SOE; China)	Listed; HK; Auchan and Ruentex group	Listed; USA	Listed; HK; Bailian Group Co.	Listed; France	Listed; Shanghai; Dairy Farm 20%; JD.com 10%;	China
Website	www.crvanguard.com.hk www.crc.com.cn	www.sunartretail.com www.rt-mart.com.tw	www.wal-martchina.com www.samsclub.cn	lianhua.todayir.com	www.carrefour.cn www.carrefour.com.cn www.carrefour.com	www.yonghui.com.cn	www.ngs1685.com
Annual sales Total/Food	US\$15.2b (13)	US\$14.0b (14)	US\$11.0b (13)	US\$10.5b (13)	US\$7.1b (13)	US\$5.3b	US\$4.6b
Food store formats	Hypermarket Supermarket Convenience	Hypermarket Online	Hypermarket Warehouse Club Compact HM Supermarket	Hypermarkets Supermarket 4,600 Convenience 1,905	Hypermarket 236 Convenience 3 Online	Supermarket	Supermarkets 2,644 Convenience 1,700
# of stores	4,637	264	423	6,900+	239	351	2,644
Store fascia	    	   	   	 	 	 	 - Alldays - Kedi














Source: Coriolis from a wide range of sources

FOCUS MARKET - 3 - CHINA

... continued

POTENTIAL IN-MARKET PARTNERS - CHINA

2015 or as available










							
Firm	HNA Group	Wumart Stores	Better-Life	Jiajiayue Group	A. Best Supermarket	Metro Cash & Carry	Lotte Mart
Ownership	Private; China	Public; China	Public; China	Public; China	Public; China	Listed; Germany	Listed; Korea
Website	www.hnagroup.com/	www.wumart.com	www.bbg.com.cn	www.jiajiayue.com.cn	www.abest-xyj.com	www.metro.com.cn www.metrogroup.de	www.lotte.co.kr
Annual sales Total/Food	US\$4.0b (13)	US\$3.3b (13)	US\$3.2b (13)	US\$2.9b	US\$2.7b	US\$2.7b (13)	US\$2.4b (13)
Food store formats	Hypermarkets Supermarkets Convenience	Hypermarkets Convenience	Hypermarkets Department stores Online	Hypermarket Supermarket Department store Convenience	Hypermarket Supermarket	Cash & Carry	Hypermarkets Supermarkets
# of stores	482	547	445	601	116	75	110
Store fascia	Le Wan Jia Supermarket Jiangsu Chaoyue Supermarket Hunan Joindoor Supermarket						

FOCUS MARKET - 3 - CHINA

... continued

POTENTIAL IN-MARKET PARTNERS - CHINA

2015 or as available

				
Firm	Sinopec Group	PetroChina Co.	Dongguan Sugar & Liquor Group	Seven & I Holdings
Ownership	Chinese government (SOE)	Chinese government (SOE)		Japan; listed
Website	english.sinopec.com		www.meiyijia.com.cn	www.7-11.cn www.7andi.com www.sej.co.jp www.itoyokado.co.jp
Annual sales Total/Food	US\$455b (14)			US\$49.1b US\$17.5b
Food store formats	Easy Joy	uSmile	Meiyijia	Seven&I 301 Area licensees 1,763 - DairyFarm 740 - Others -1,063
# of stores	23,300	14,000	5,580	2,064
Store fascia	 			

DOCUMENT STRUCTURE

What is the strategic situation in the market?

In this environment, what is the opportunity for Western Australia?

Who are the potential in-market partners?



Who are the key firms in Western Australia capable of delivering?



IDENTIFIED WA COMPANIES

<p>FARAWAY HILL ORCHARD </p>	<p>High Vale Orchard </p>	<p>KARINTHA ORCHARDS </p>
<p>ADDRESS: Bremer Lane, Donnybrook, WA 6239</p>	<p>ADDRESS: 35 Merrivale Rd, Pickering Brook, WA 6076</p>	<p>ADDRESS: Mitchell Rd, Donnybrook, WA 6239</p>
<p>PHONE: 08 9731 2452</p>	<p>PHONE: 08 9293 8217</p>	<p>PHONE: 08 9731 0106</p>
<p>WEBSITE: www.westernaustralianapples.com.au</p>	<p>WEBSITE: www.highvale.com</p>	<p>WEBSITE: www.karinthaorchards.com</p>

<p>KARRAGULLEN COOL STORAGE </p>	<p>LYSTER ORCHARDS </p>	<p>Newton Brothers Orchards </p>
<p>ADDRESS: 42 Rokewood Way, Karagullen, WA 6111</p>	<p>ADDRESS: South Western Hwy, Manjimup, WA 6258</p>	<p>ADDRESS: 62-66 Franklin Street, Manjimup, WA 6258</p>
<p>PHONE: 08 9397 5905</p>	<p>PHONE: 0417 438 806</p>	<p>PHONE: 08 9771 1135</p>
<p>WEBSITE: www.karragullencoolstorage.com.au</p>	<p>WEBSITE: www.lysterorchards.com.au</p>	<p>WEBSITE: www.newtonorchards.com.au</p>

<p>Prime Organics/ Twin Apple Pack House </p>	<p>RAEBURN ORCHARDS </p>
<p>ADDRESS: 206 Goldfields Rd, Upper Capel, WA 6239</p>	<p>ADDRESS: 4 Raeburn Rd, Roleystone, WA 6111</p>
<p>PHONE: 08 9731 1363</p>	<p>PHONE: 08 9397 5325</p>
<p>WEBSITE: www.primeorganics.com.au</p>	<p>WEBSITE: www.raeburnorchards.com</p>

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Coriolis is the leading Australasian management consulting firm specialising in the wider food value chain. We work on projects in agriculture, food and beverages, consumer packaged goods, retailing & foodservice. In other words, things you put in your mouth and places that sell them.

WHERE WE WORK

We focus on the Asia Pacific region, but look at problems with a global point-of-view. We have strong understanding of, and experience in, markets and systems in Australia, China, Japan, Malaysia, New Zealand, Singapore, South Korea, Thailand, the United Kingdom and the U.S. We regularly conduct international market evaluations and benchmarking.

WHAT WE DO

We help our clients assemble the facts needed to guide their big decisions. We develop practical, fact-based insights grounded in the real world that guide our clients decisions and actions. We make practical recommendations. We work with clients to make change happen. We assume leadership positions to implement change as necessary.

HOW WE DO IT

All of our team have worked across one-or-more parts of the wider food value chain, from farm-to-plate. As a result, our recommendations are grounded in the real world. Our style is practical and down-to-earth. We try to put ourselves in our clients' shoes and focus on actions. We listen hard, but we are suspicious of the consensus. We provide an external, objective perspective. We are happy to link our fees to results.

WHO WE WORK WITH

We only work with a select group of clients we trust. We build long term relationships with our clients and more than 80% of our work comes from existing clients. Our clients trust our experience, advice and integrity.

Coriolis advises clients on growth strategy, mergers and acquisitions, operational improvement and organisational change. Typical assignments for clients include...

FIRM STRATEGY & OPERATIONS

We help clients develop their own strategy for growing sales and profits. We have a strong bias towards growth driven by new products, new channels and new markets.

MARKET ENTRY

We help clients identify which countries are the most attractive - from a consumer, a competition and a channel point-of-view. Following this we assist in developing a plan for market entry and growth.

VALUE CREATION

We help clients create value through revenue growth and cost reduction.

TARGET IDENTIFICATION

We help clients identify high potential acquisition targets by profiling industries, screening companies and devising a plan to approach targets.

DUE DILIGENCE

We help organisations make better decisions by performing consumer and market-focused due diligence and assessing performance improvement opportunities.

EXPERT WITNESS

We provide expert witness support to clients in legal cases and insurance claims. We assist with applications under competition/fair trade laws and regulations.

