



TARGET MARKET OPPORTUNITIES IN ASIA FOR PORK

Part of Asia Market Success, April 2016



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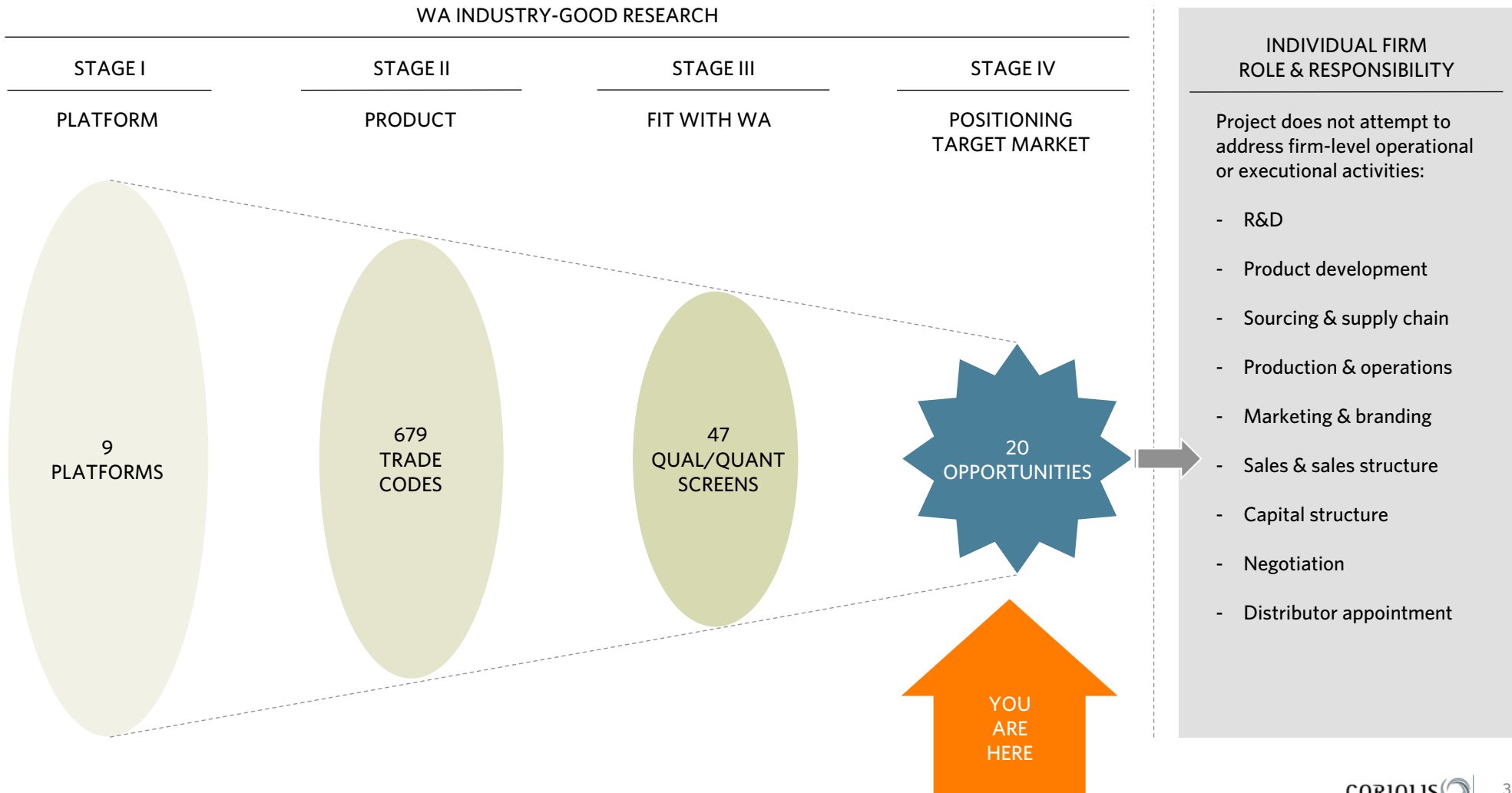
FINAL v100; April 2016

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

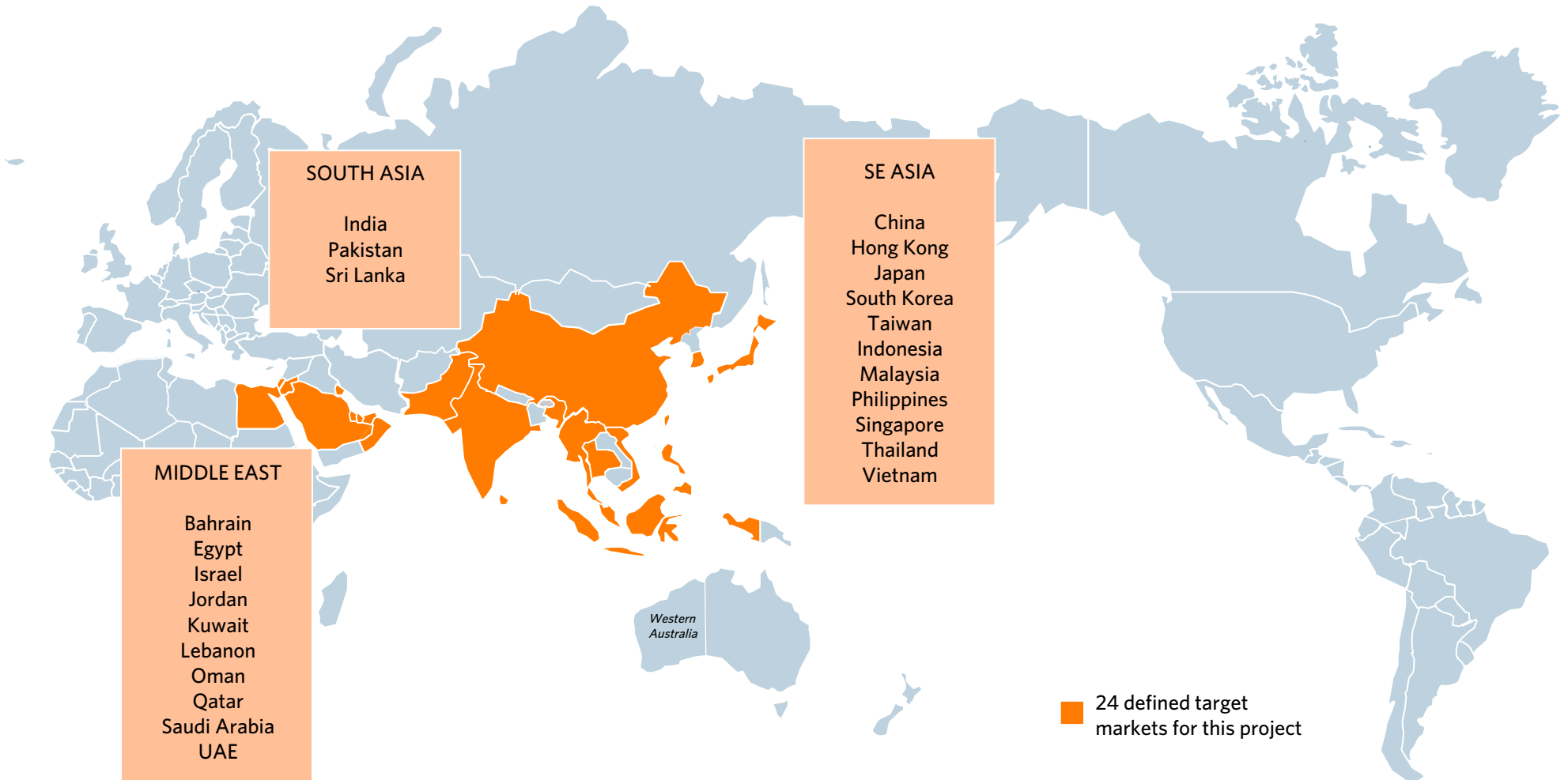
Model; 2016



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?

Chilled pork emerged in Phase I as one of twenty “high growth, high potential” opportunities for Western Australia; pork is a meat used in a wide range of dishes and cuisine styles

PRODUCT OVERVIEW

Example; 2016

	PRODUCT PROFILE	
	HS Codes	020311, 020312, 020319, 020630
	Product	All fresh/chilled meat of pigs (pork); all forms (carcasses, half-carcasses, bone-in cuts/primals, boneless cuts/primals, chilled offal)
	Out-of-scope	Live; frozen; dried; processed/cured; canned; ready-meals; other processed foods
	Origin	Among the first animals to be domesticated by humans; domesticated approximately 13,000 BC in the Middle East
	Example ingredients	Pig meat
	Forms/usage	<ul style="list-style-type: none"> - Roasted or barbecued (part or whole) - Fried; stir fried; similar - Baked - Ingredient or flavouring in a wide range of processed foods (e.g instant noodles) - Wide range of other uses
	Drivers of consumer/ market success	<ul style="list-style-type: none"> - Very strong cultural component to consumption; very high consumption in East Asia and non-Muslim parts of SE Asia, particularly China - Suitable for processing into a wide range of value-added products - Rich, strong, distinctive flavour; comfort food for some people (e.g. bacon)

DOCUMENT STRUCTURE

What is the global situation?

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?

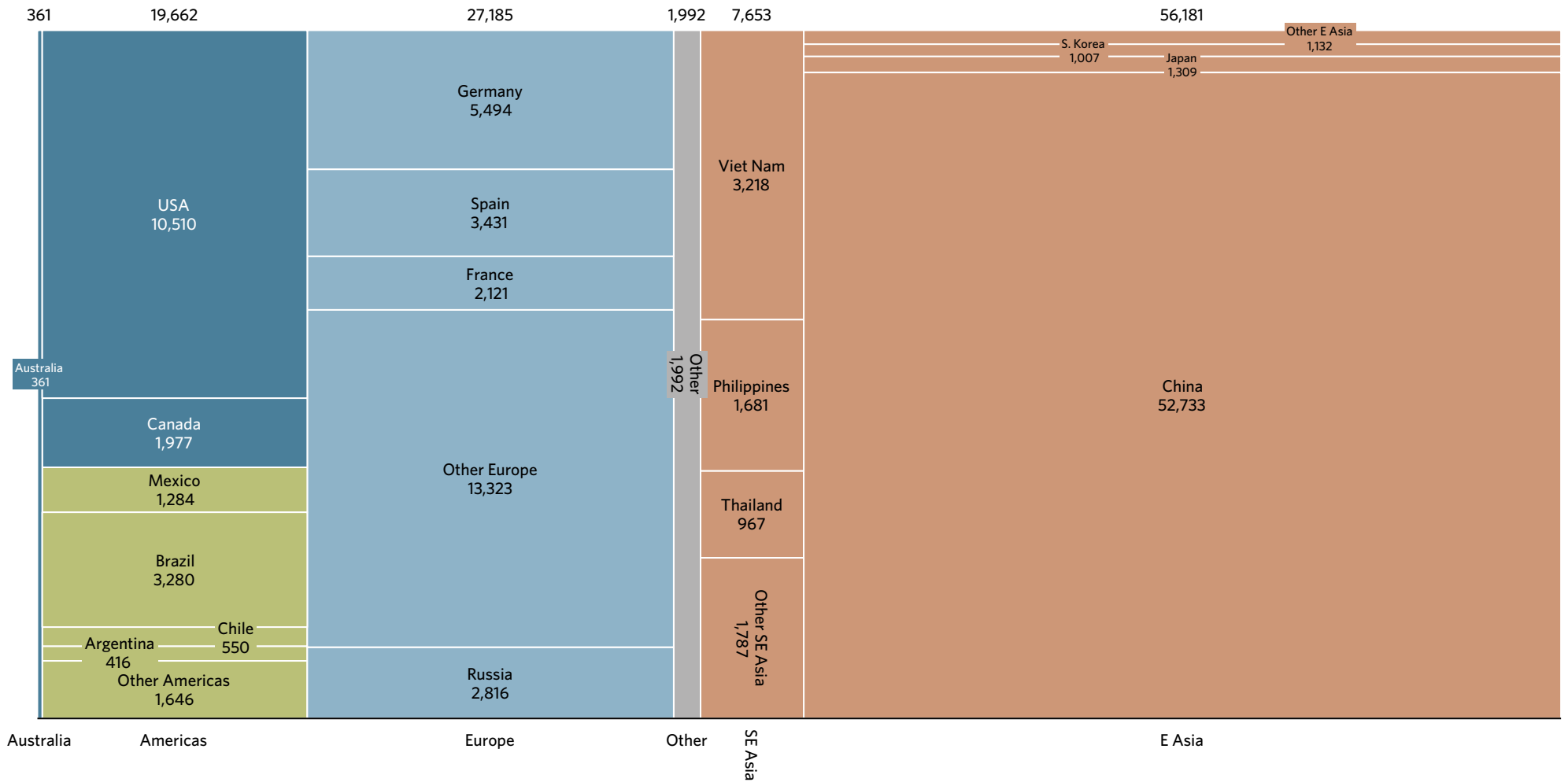
Who are the key firms in Western Australia capable of delivering?



Global pork production occurs predominantly in China, Europe and the Americas

DISTRIBUTION OF GLOBAL PORK MEAT PRODUCTION

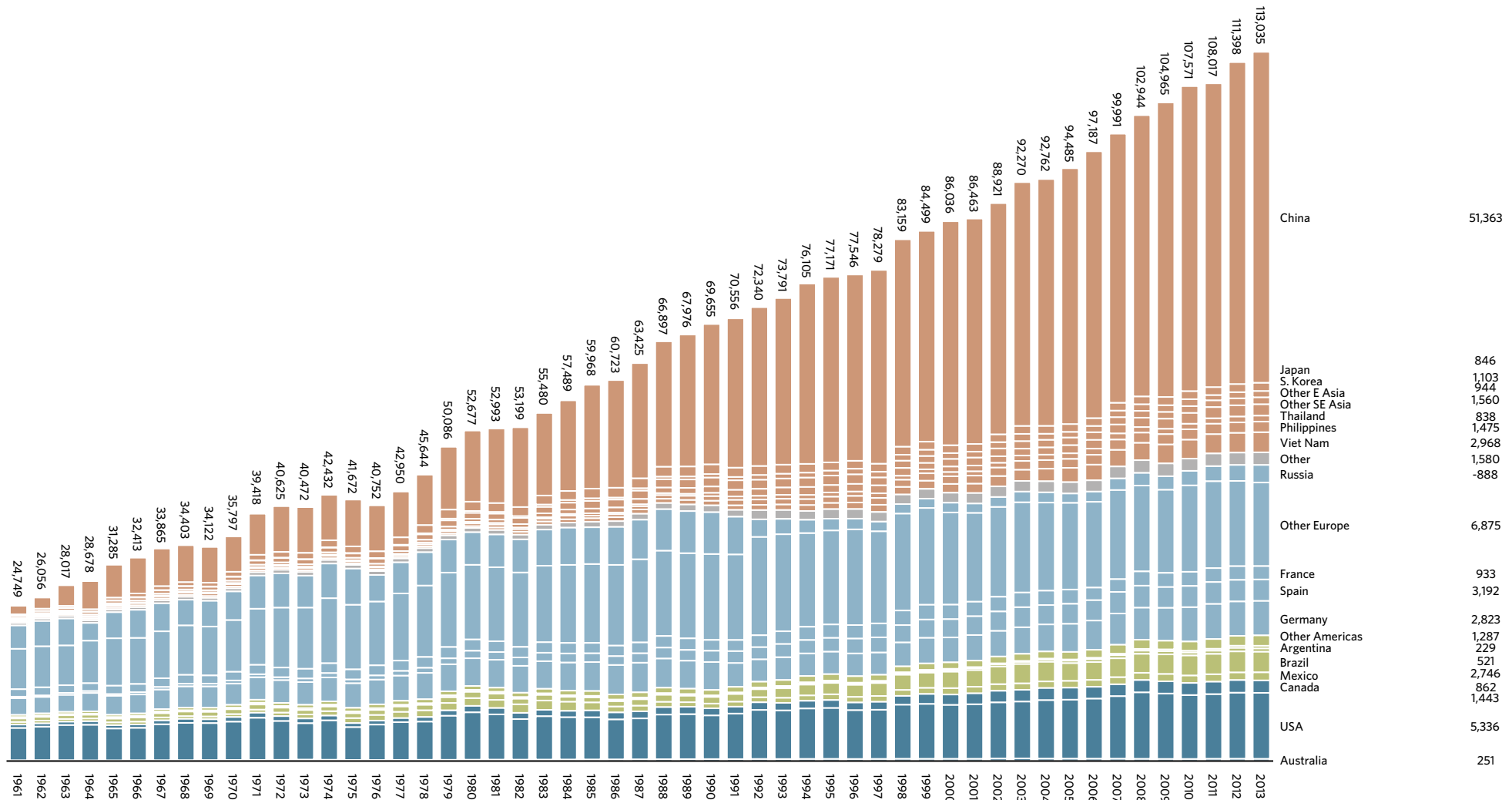
Tonnes; 000; 2013



Global pork production is increasing long term, with all major producers, including Australia, increasing production

52 YEAR DISTRIBUTION OF GLOBAL PORK MEAT PRODUCTION*
Tonnes; 000; 1961-2013

52y ABS

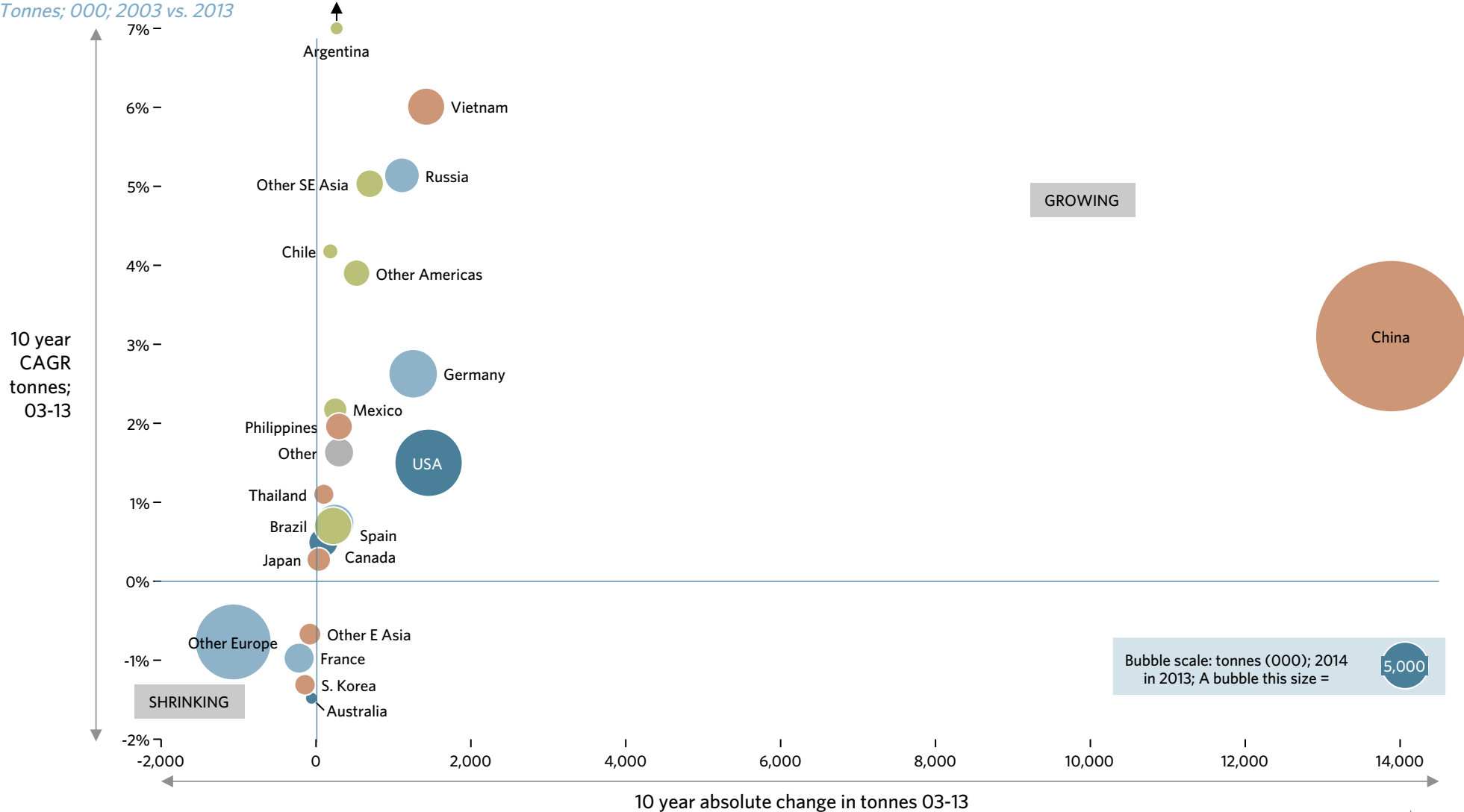


* Data is meat production; excludes live exports (measured at destination); Source: UN FAO AgStat database; Coriolis classification and analysis

Over the past decade, pork production growth has been driven by China

10 YEAR PORK PRODUCTION GROWTH MATRIX: ABSOLUTE CHANGE VS. RATE OF CHANGE VS. CURRENT NUMBER

Tonnes; 000; 2003 vs. 2013

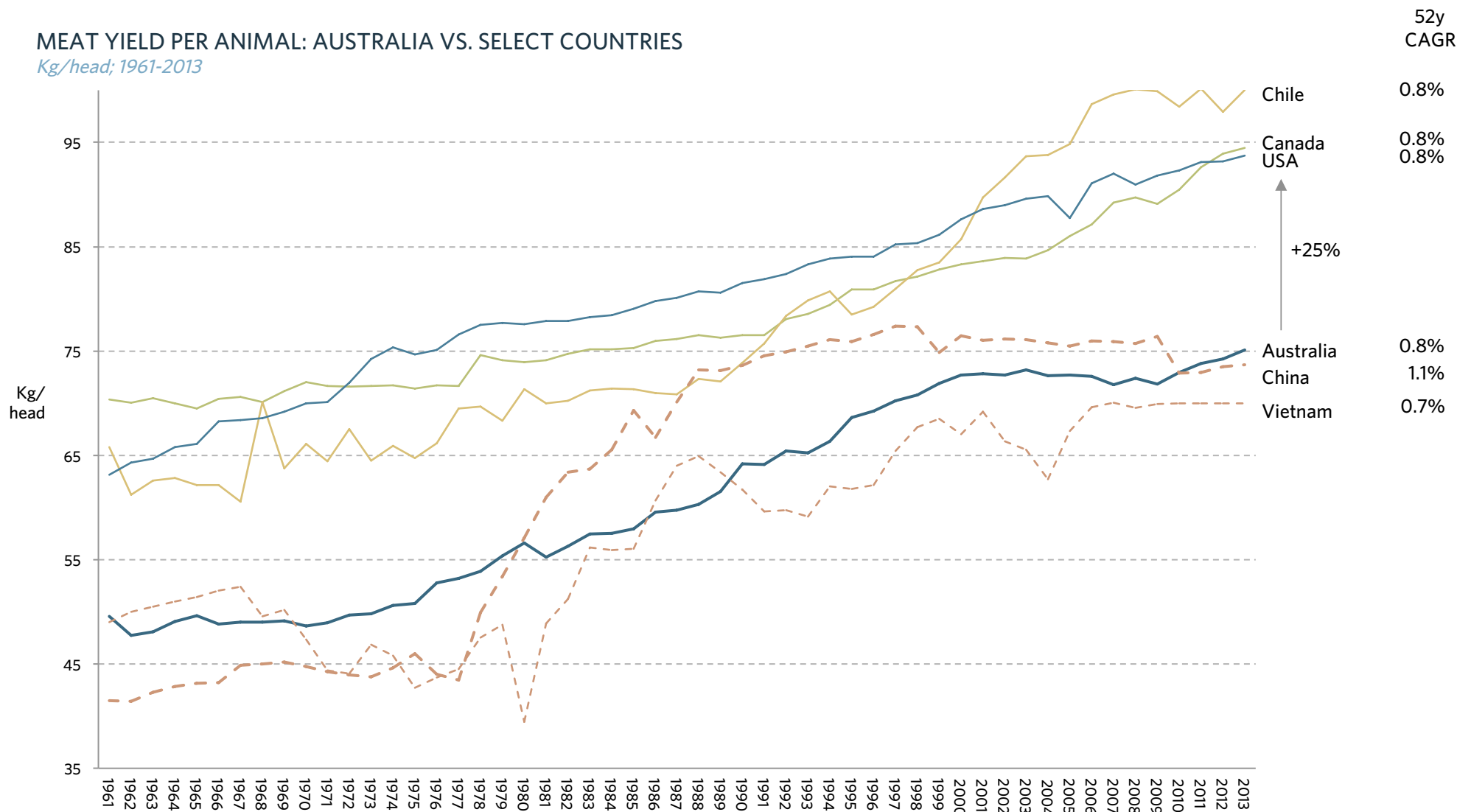


Source: UN FAO AgStat database; Coriolis classification and analysis

All major producers are achieving yield improvements; Australia clearly has yield upside potential

MEAT YIELD PER ANIMAL: AUSTRALIA VS. SELECT COUNTRIES

Kg/head; 1961-2013



DOCUMENT STRUCTURE

What is the global situation?

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?



Companies identified chilled pork as the opportunity, with an increasing focus on case ready

"Fresh pork into Asia is an opportunity."

"Mixed success with chilled carcasses."

"Opportunity for more shelf-ready pork products."

"Free range pork into Asia is an opportunity. We need to sell the story, the message around the whole system."

"We need to look for chilled opportunities beyond Singapore, no access for chilled pork into China."

Within the Pork Opportunity, chilled pork was identified as the largest opportunity for Western Australia; the trade codes are defined as follows

TRADE DESCRIPTION BY TEMPERATURE STATE

IN SCOPE
Pork, chilled carcass
Pork, chilled cuts
Pork, chilled nes
Pork, chilled offal

OUT OF SCOPE
Pork, frozen carcass
Pork, frozen cuts
Pork, frozen nes
Pork, frozen offal

Western Australia has the potential to grow chilled pork exports to Asia

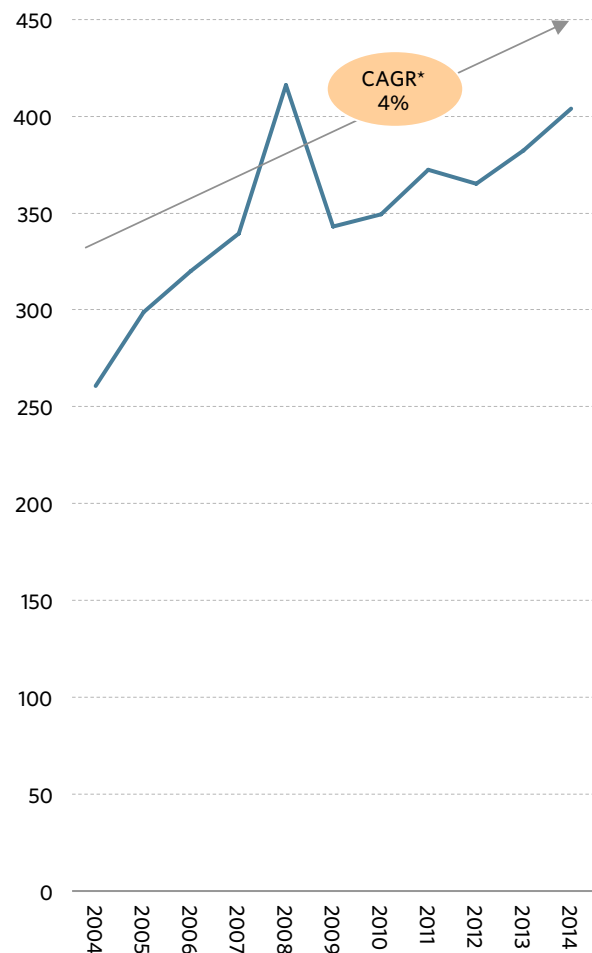
- Asian chilled pork import value is rising, driven by a combination of increased volumes and growing prices
- Asian/Middle East chilled pork import growth is coming across a range of products; however, chilled ones (*Not Elsewhere Specified; a catch-all other code*) is the largest
- Asian/Middle East chilled pork import supply is currently dominated by the US and Canada
 - The USA and Canada have been capturing most value growth over the past decade
 - While the USA and Canada stand out for driving total export growth over the past five years, Chile and a number of European countries stand out for rate of growth
 - Average FOB price to target Asian markets vary by supplier, with the USA appearing to set the pricing lead
- Japan is currently the key Asian/Middle East market for chilled pork; other Tier II markets include South Korea, Hong Kong, Singapore and China
 - Over the past ten years, value growth in chilled pork trade into Asia/Middle East has come predominantly from Japan
 - Japan is driving absolute trade growth, while China stands out for strong growth off a low base; all other markets shrinking or microscopic in size
 - Average chilled pork import prices vary by country, with Japan standing out as a large market paying premium prices
 - Imported chilled pork consumption and aggregate chilled pork imports appear correlated with income per capita in East Asian countries with some form of "S-Curve" take-off at \$30k/capita; South Korea, Taiwan and China stand out as having strong long-term growth potential
- Market share varies by country; Australia is strong in Singapore and has extensive opportunities elsewhere
- Western Australia has a strong position in Singapore and good potential for further share growth across a number of large markets
- Data supports new high value, premium chilled pork opportunities being initially launched in (1) Singapore, (2) Hong Kong and (3) South Korea
- As a "Straw Man" for discussion, we identify an export market roll-out plan

Asian chilled pork import value is rising, driven by a combination of increased volumes and growing prices

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

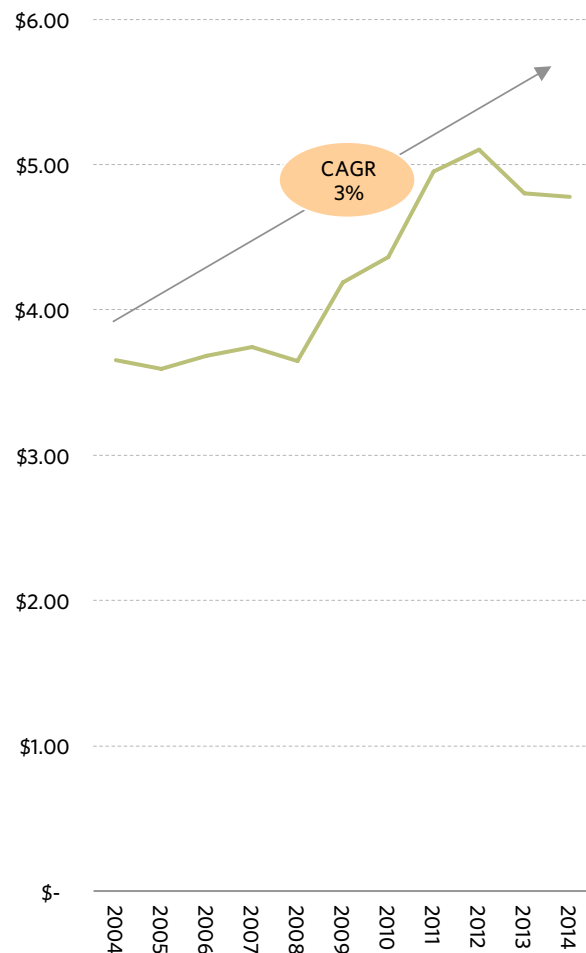
VOLUME

T; 000; 2004-2014



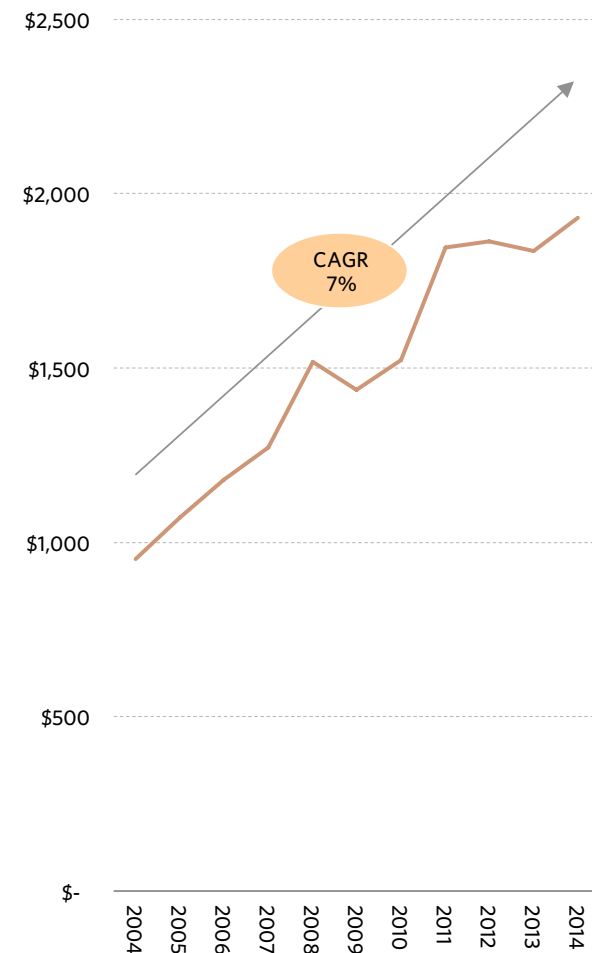
AVERAGE PRICE PER KILOGRAM

US\$; 2004-2014



VALUE

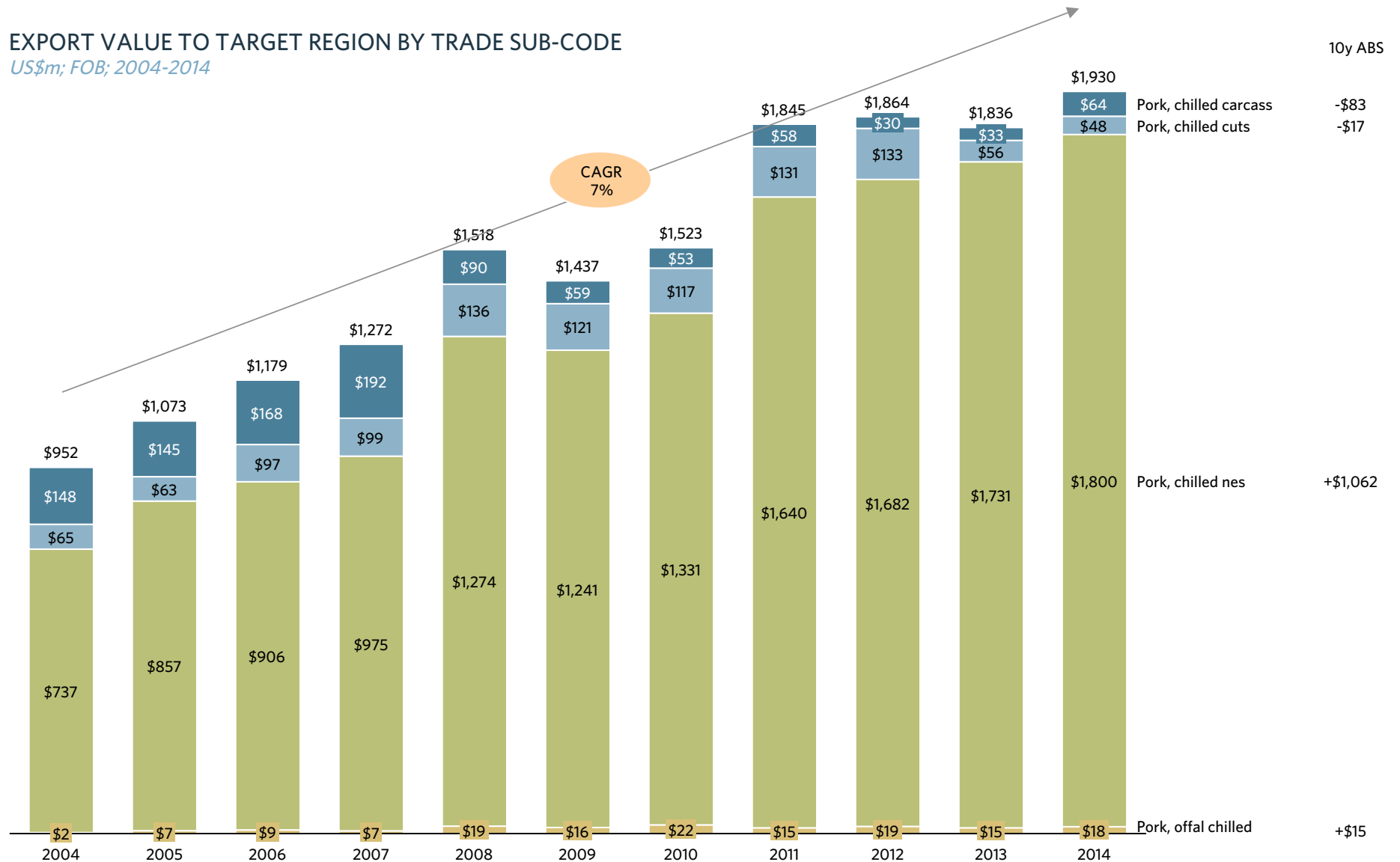
US\$m; 2004-2014



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

Asian/Middle East chilled pork import growth is coming across a range of products; however, chilled nes (*Not Elsewhere Specified; a catch-all other code*) is the largest

EXPORT VALUE TO TARGET REGION BY TRADE SUB-CODE
 US\$m; FOB; 2004-2014



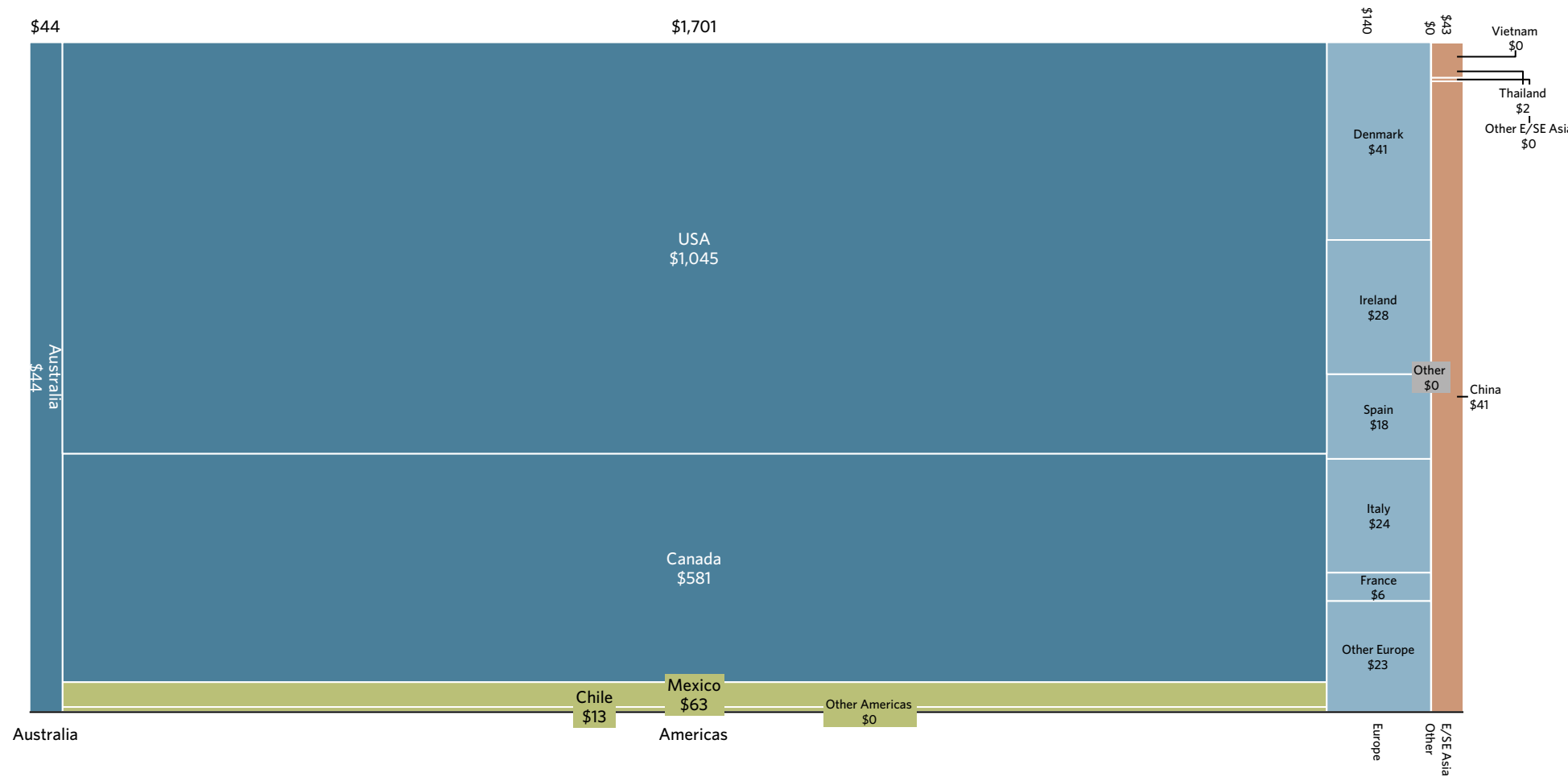
Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Asian/Middle East chilled pork import supply is currently dominated by the USA and Canada

EXPORT VALUE BY SUPPLIER TO TARGET REGION

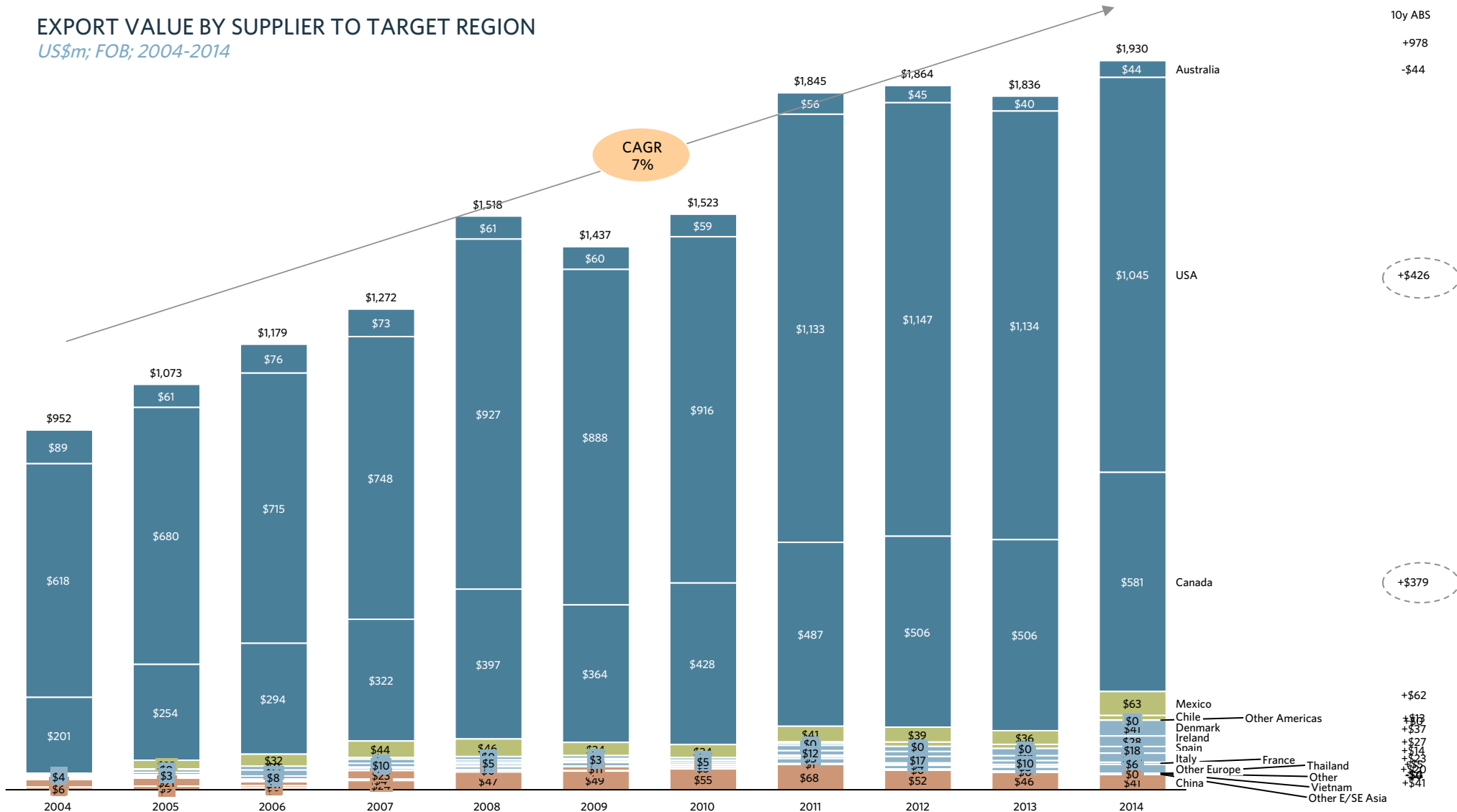
US\$m; FOB; 2014

TOTAL = US\$1,930m



The USA and Canada have been capturing most value growth over the past decade

EXPORT VALUE BY SUPPLIER TO TARGET REGION
US\$m; FOB; 2004-2014

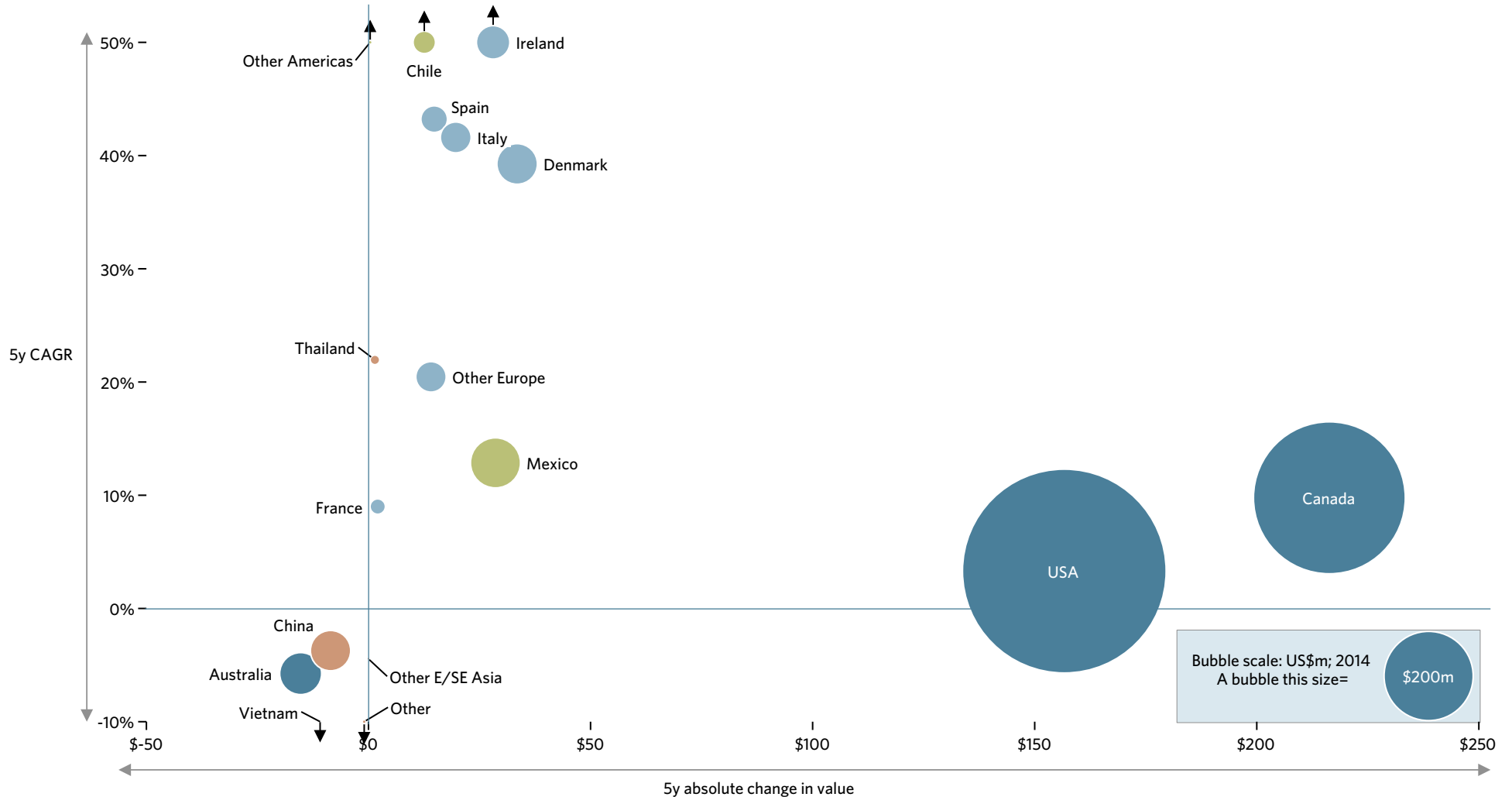


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

While the USA and Canada stand out for driving total export growth over the past five years, Chile and a number of European countries stand out for rate of growth

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

US\$m; 2009 vs. 2014

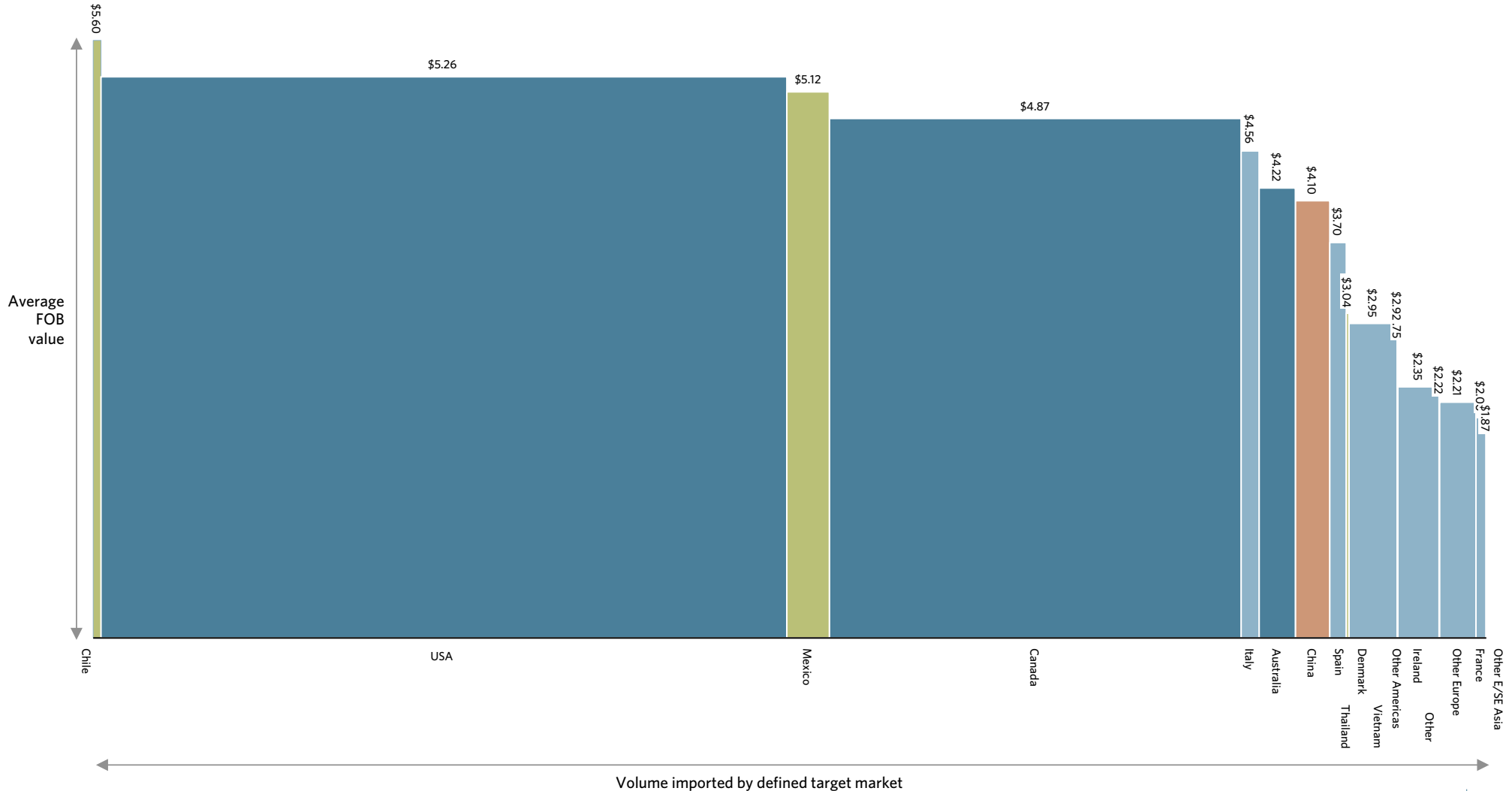


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Average FOB price to target Asian markets vary by supplier, with the USA appearing to set the pricing lead

AVERAGE EXPORT VALUE COST CURVE BY SUPPLIER

US\$/kg; t; FOB; 2014



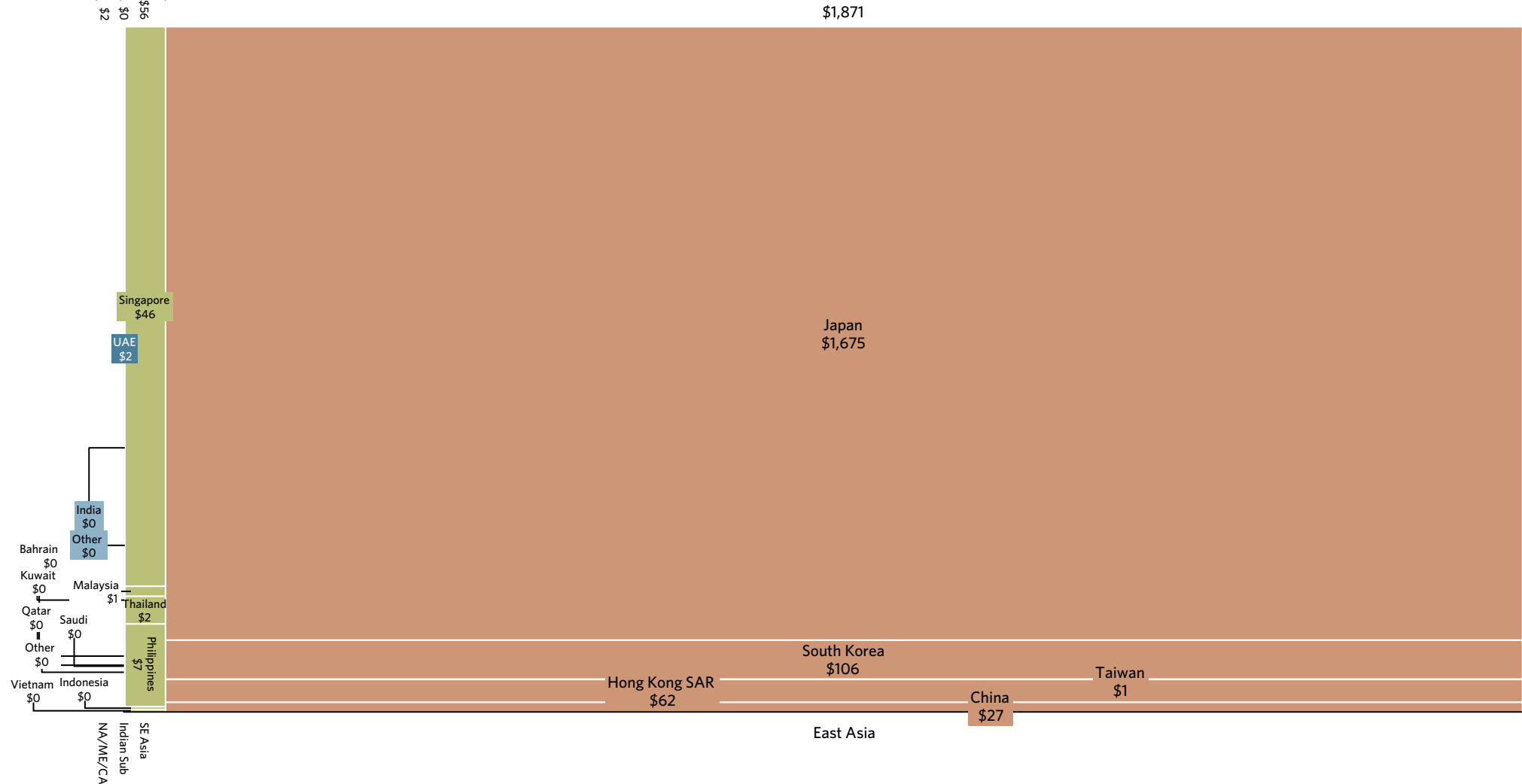
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Japan is currently the key Asian/Middle East market for chilled pork; other Tier II markets include South Korea, Hong Kong, Singapore and China

IMPORT VALUE BY MARKET BY REGION

US\$m; FOB; 2014

TOTAL = US\$1,930m

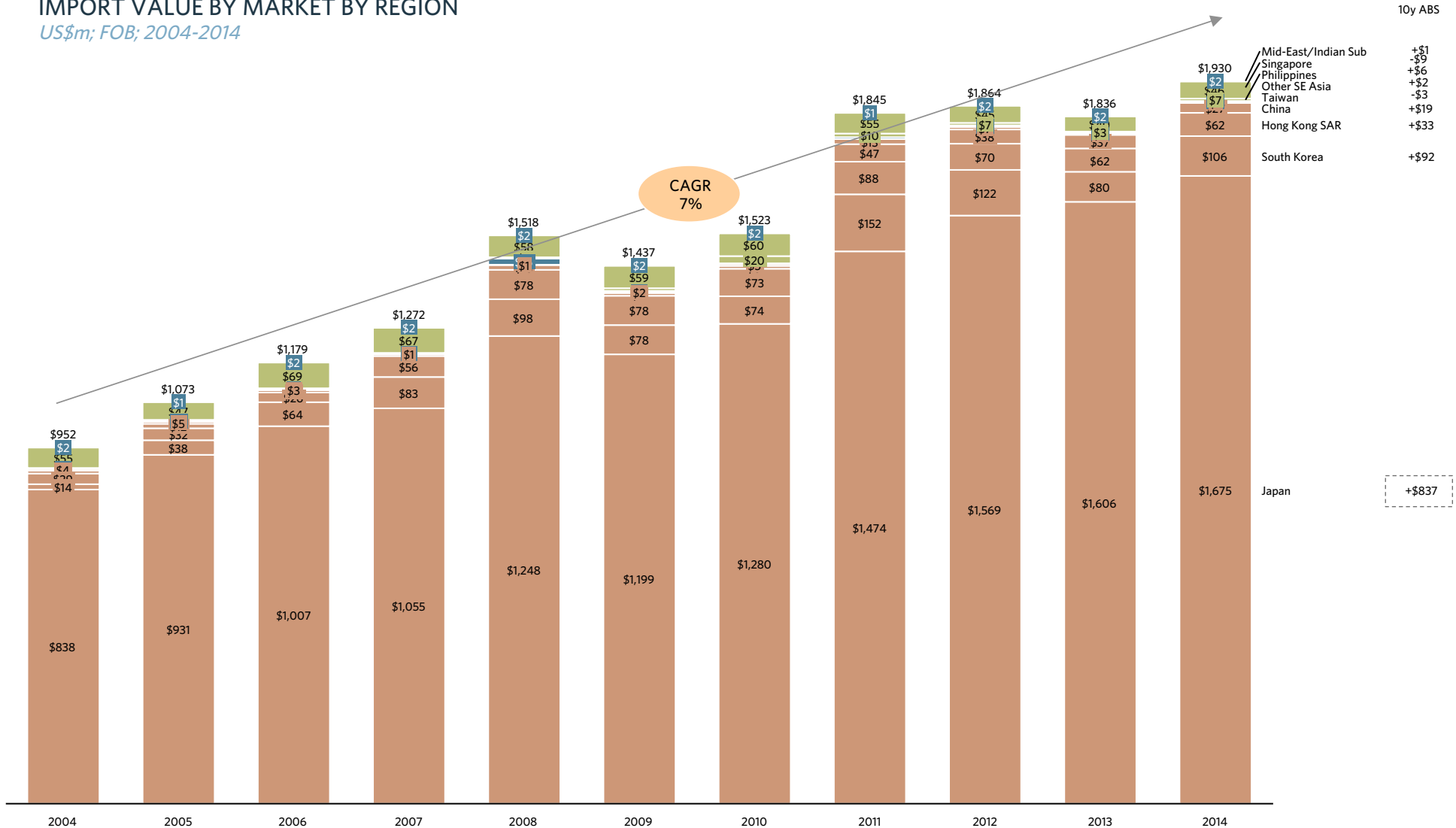


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Over the past ten years, value growth in chilled pork trade into Asia/Middle East has come predominantly from Japan

IMPORT VALUE BY MARKET BY REGION

US\$m; FOB; 2004-2014

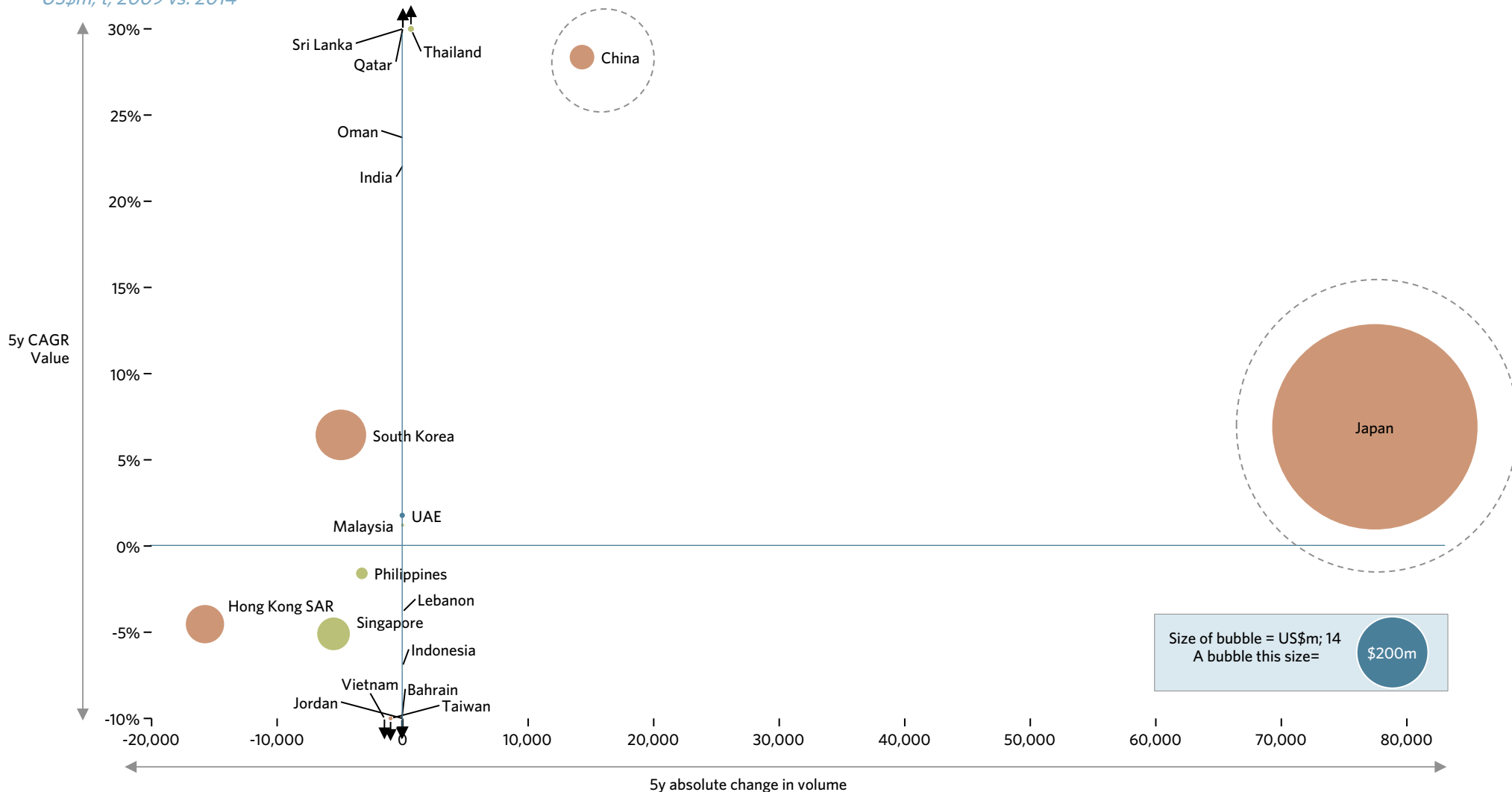


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Japan is driving absolute trade growth, while China stands out for strong growth off a low base; all other markets shrinking or microscopic in size

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

US\$m; t; 2009 vs. 2014

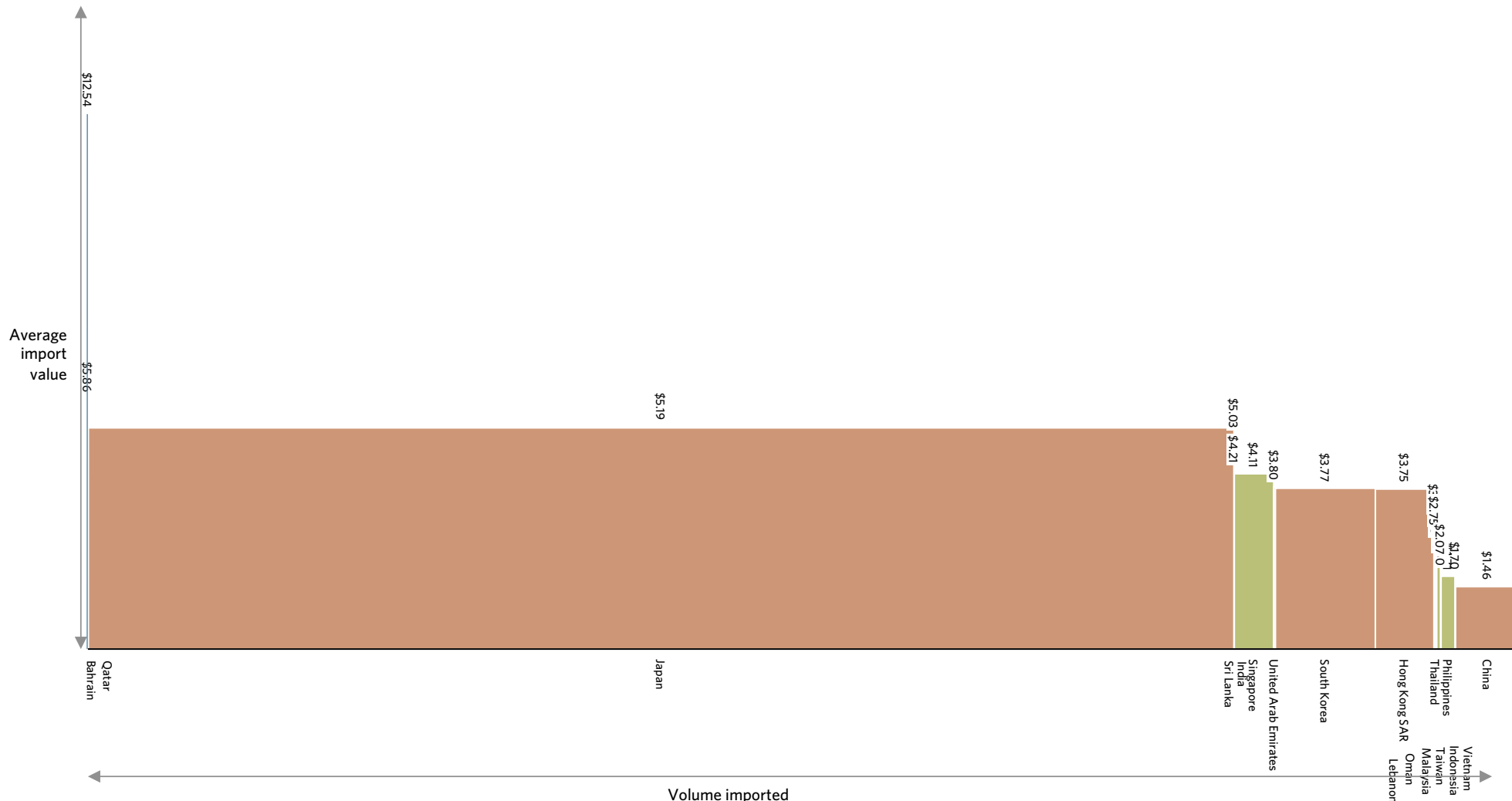


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Average chilled pork import prices vary by country, with Japan standing out as a large market paying premium prices

AVERAGE IMPORT VALUE COST CURVE BY MARKET/REGION

US\$/kg; t; FOB; 2014

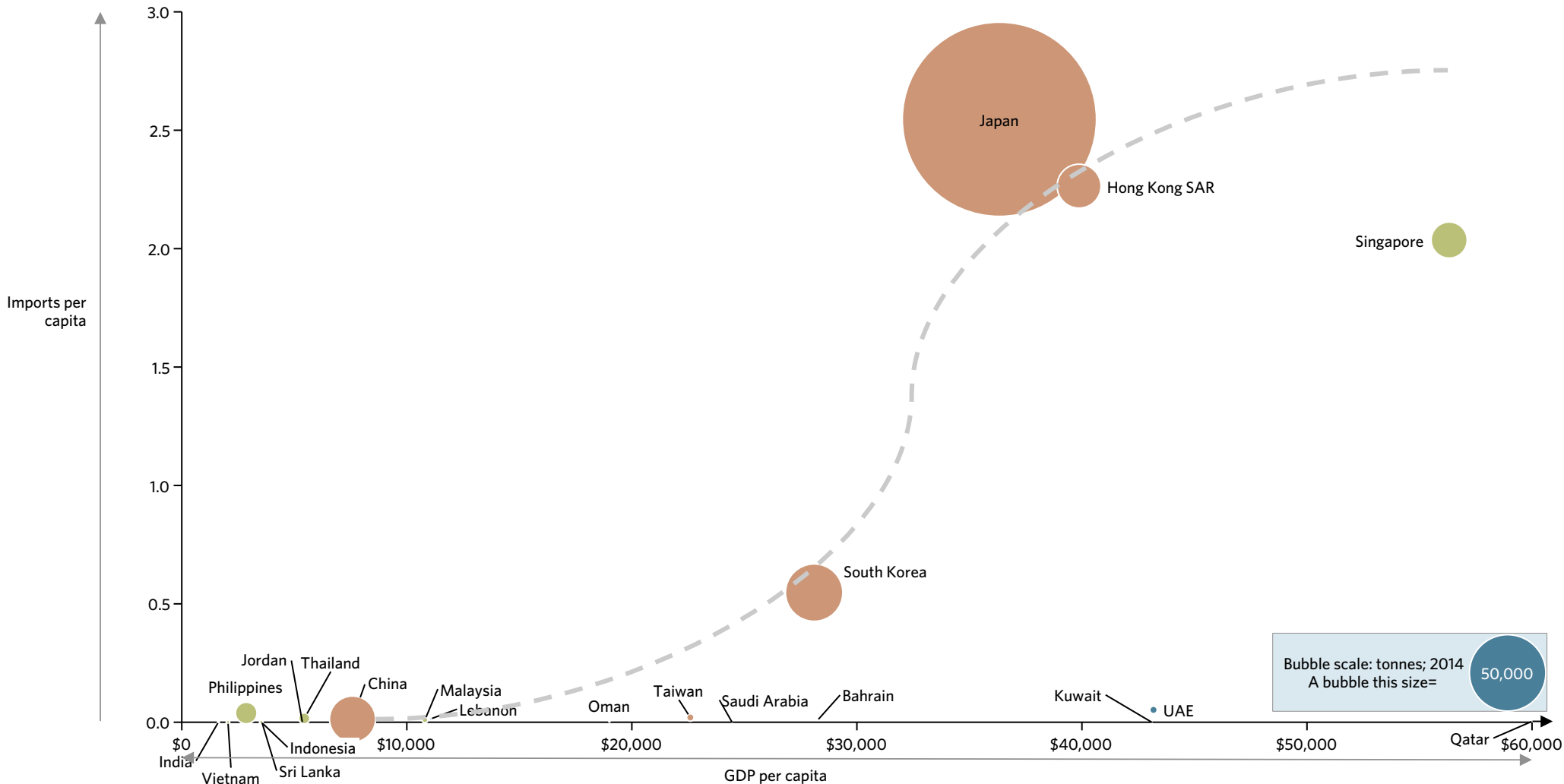


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Imported chilled pork consumption and aggregate chilled pork imports appear correlated with income per capita in East Asian countries with some form of “S-Curve” take-off at \$30k/capita; South Korea, Taiwan and China stand out as having strong long-term growth potential

MARKET SIZE DRIVERS: GDP PER CAPITA VS. IMPORTS PER CAPITA VS. MARKET SIZE

Kg; US\$; t; 2014

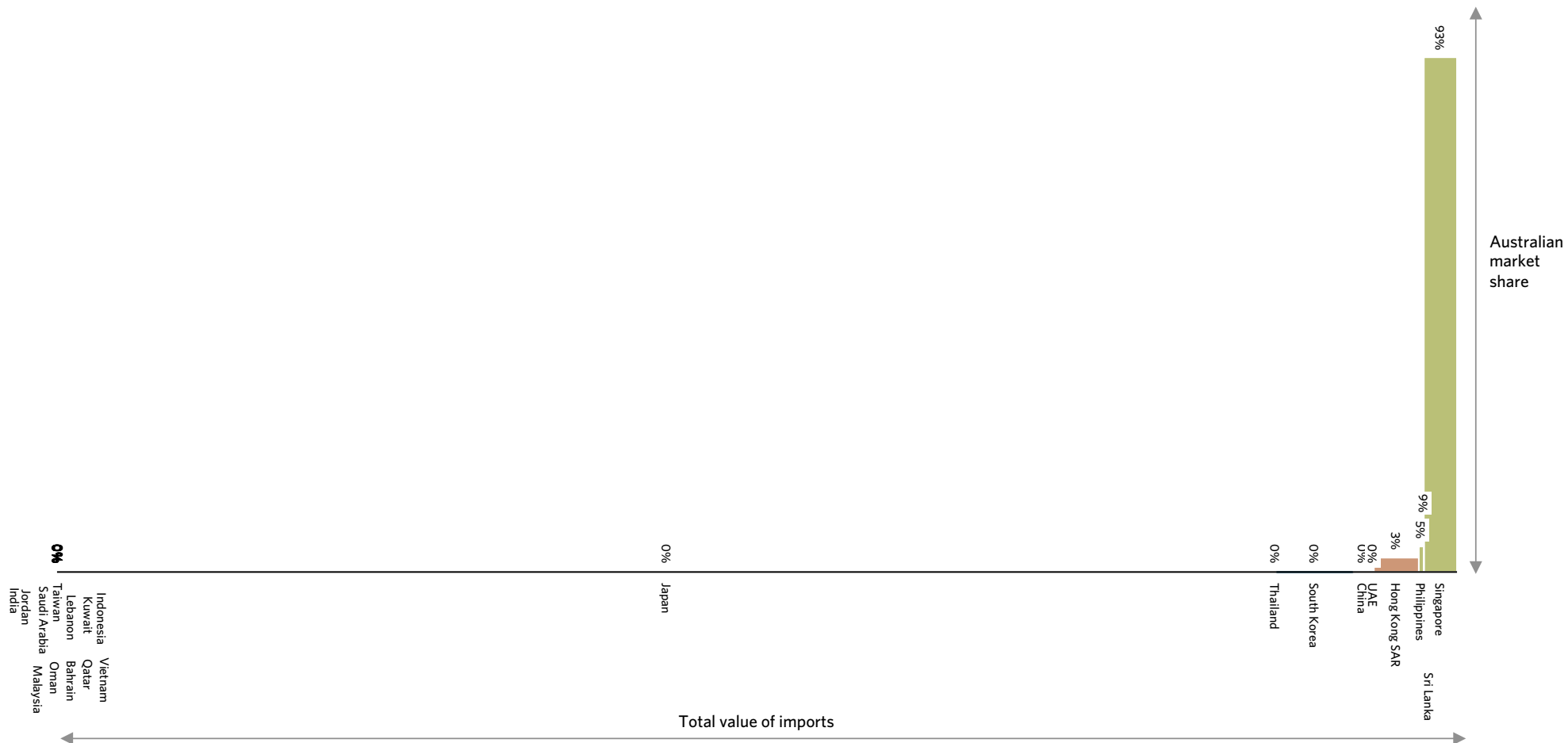


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Wikipedia (GDP/capita); Coriolis analysis and classifications

Western Australia has a strong position in Singapore and good potential for further share growth across a number of large markets

AUSTRALIAN IMPORT VALUE MARKET VS. MARKET VALUE

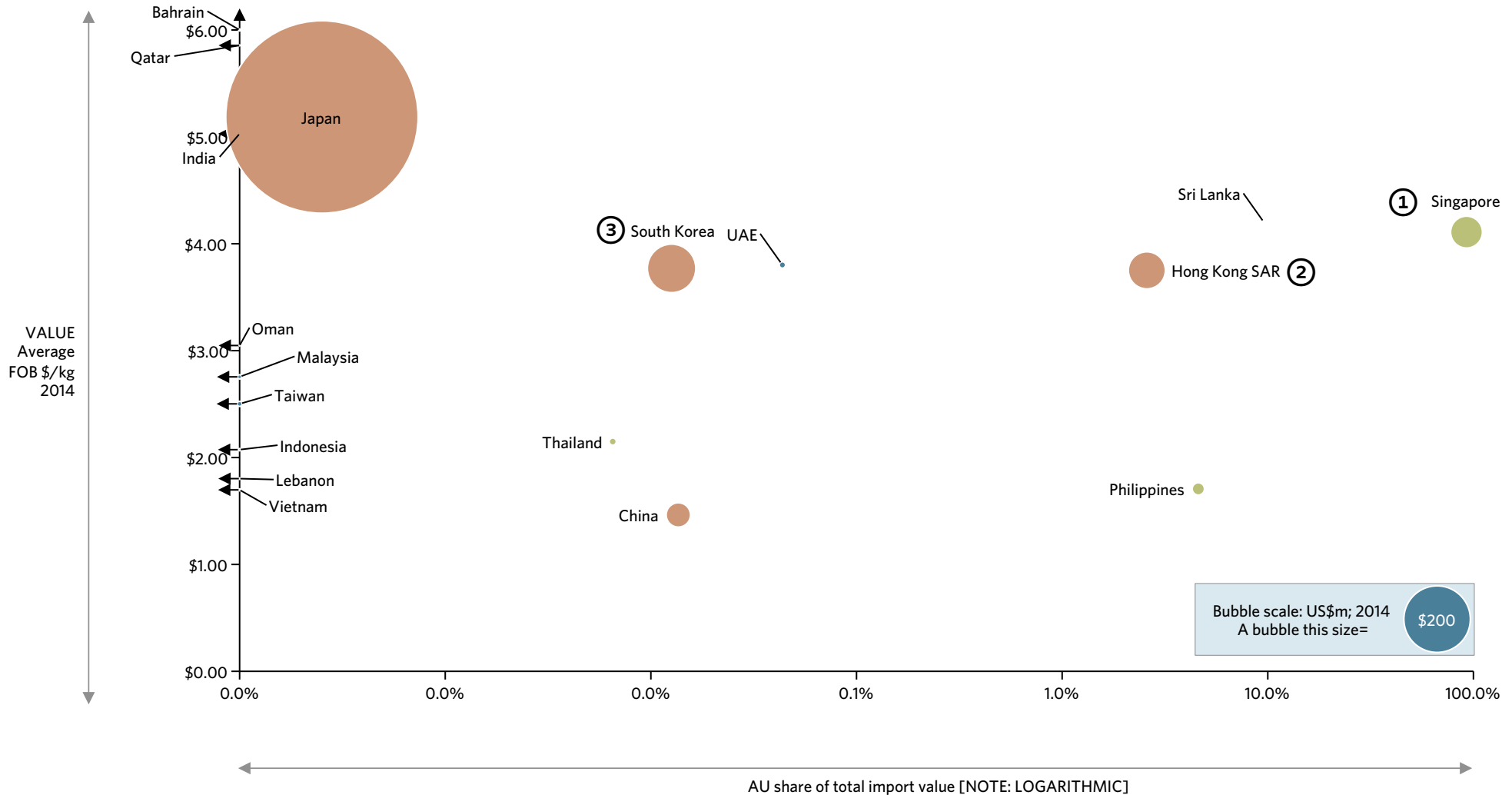
% value share; US\$m; FOB; 2014



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

Data supports new high value, premium chilled pork opportunities being initially launched in (1) Singapore, (2) Hong Kong, (3) South Korea

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 an export market roll-out plan

PRELIMINARY "STRAW MAN" DEVELOPMENT & ROLLOUT PLAN FOR CHILLED PORK OPPORTUNITY

Model; 2016

THOUGHT STARTER
"STRAW MAN" MODEL
FOR DISCUSSION



DOCUMENT STRUCTURE

What is the global situation?

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 grow chilled pork exports to Asia

IS THE MARKET DEVELOPED & COMPETITIVE?

- The flow of chilled pork from the farm through to the consumer is relatively straight forward and simple
- Chilled pork prices are attractive in Asia
- Asian supermarkets generally have a much less developed chilled pork range and offer than key Western countries

WHAT IS WA CAPABLE OF DELIVERING?

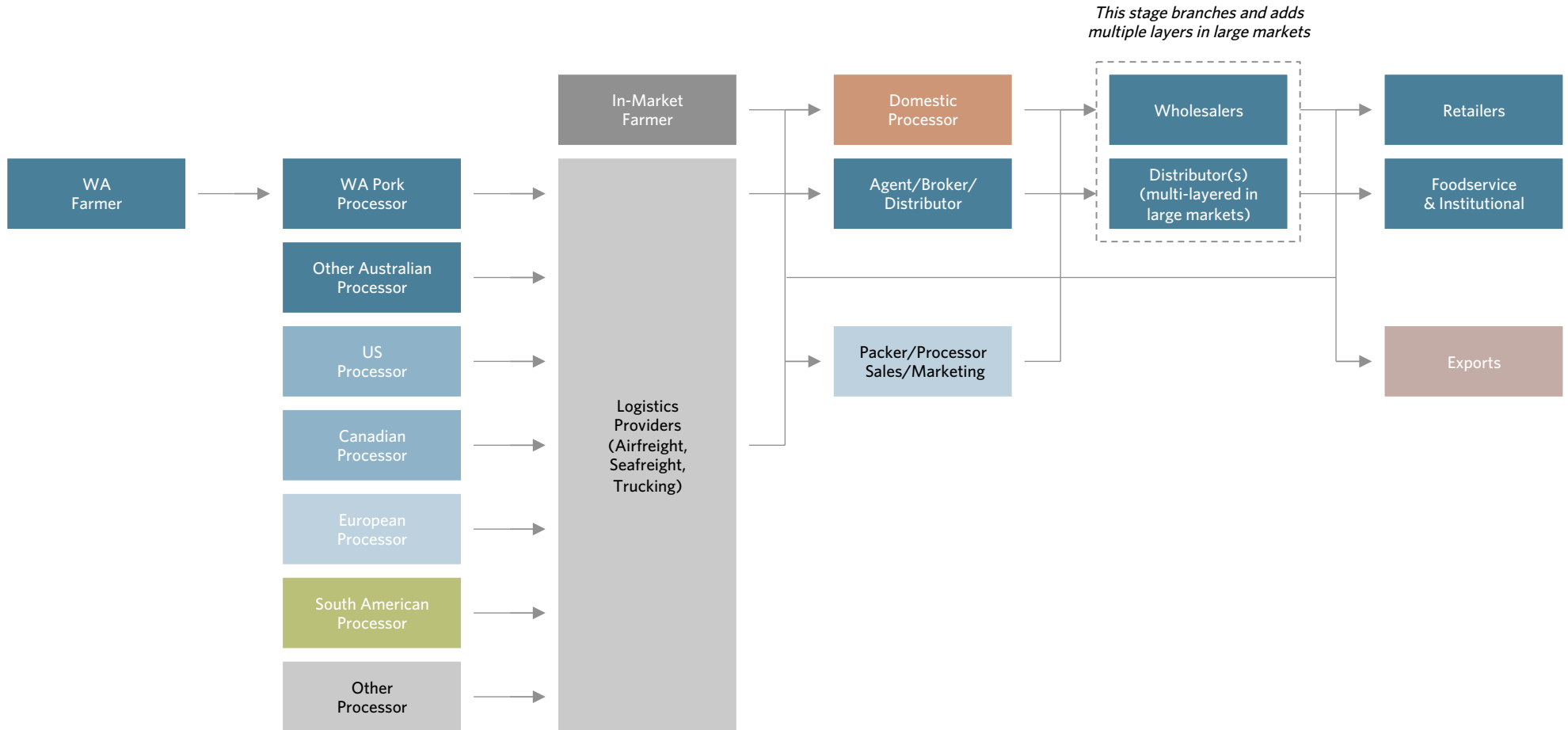
- Western Australian processors need to continue to move forward through improved product development and presentation
- Multiple potential positions exist to develop a premium chilled pork offer for Asia
- Products from other processors in other markets demonstrate what is possible in terms of developing a premium Western Australian chilled pork offer
- There are a wide range of potential product positions or claims available for a premium chilled pork product from Western Australia targeting Asia
- As a "Straw Man" for discussion, we identify an opportunity for a high value, premium chilled pork product with select characteristics for export market launch

HOW IS THE MARKET STRUCTURED?

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

SIMPLIFIED MODEL OF SUPPLY CHAIN: CHILLED PORK

Model; 2016



WHO IS THE COMPETITION? PRICING

Chilled pork prices are attractive in Asia

EXAMPLE: SHELF PRICE PER KG ACROSS SELECT WESTERN & ASIAN MARKETS: PORK LOIN

US\$/kg; Jan 2016

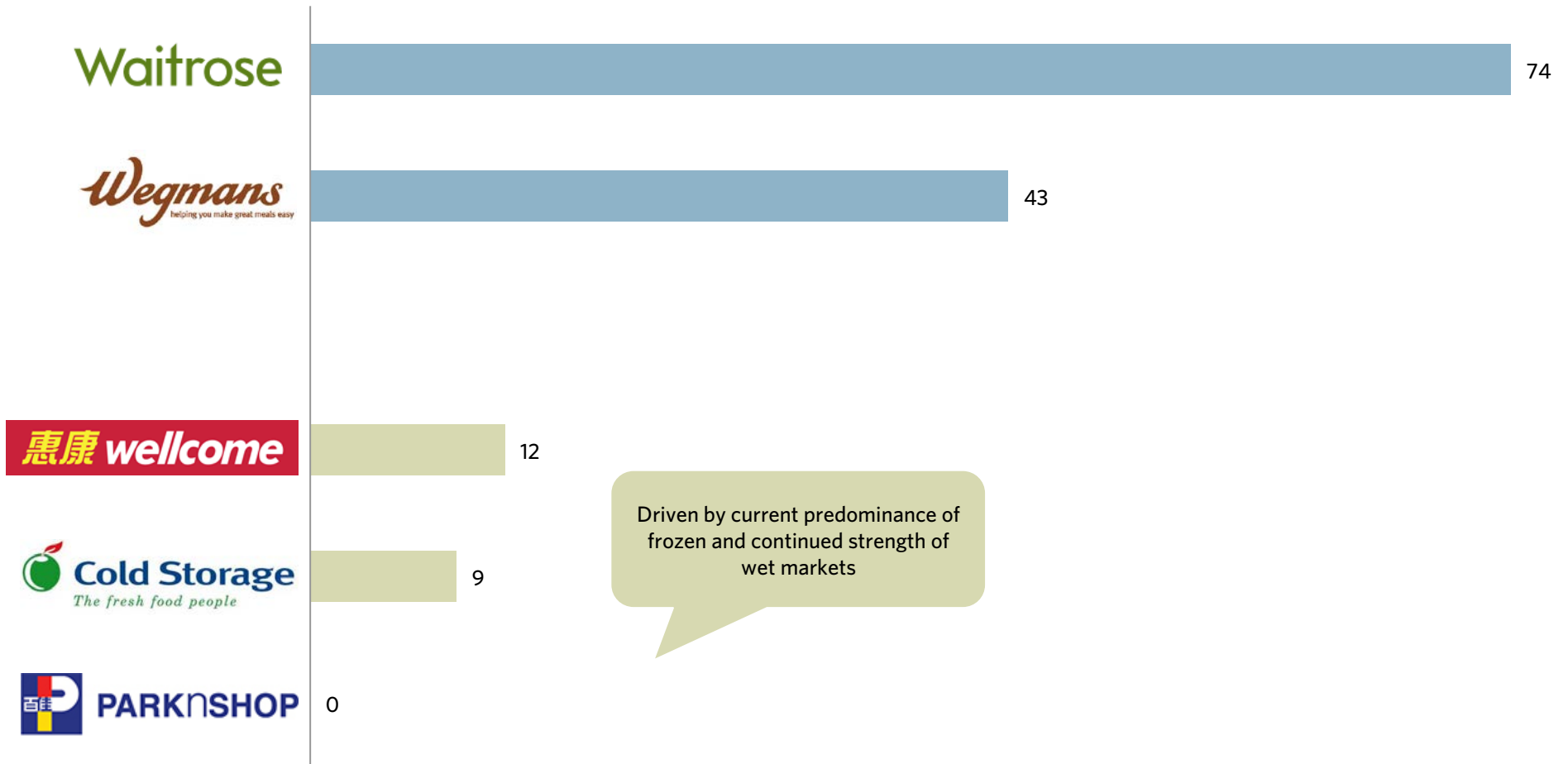


WHAT IS ON THE SHELF? RANGE IN MARKET

Asian supermarkets generally have a much less developed chilled pork range and offer than key Western countries

NUMBER OF CHILLED PORK ITEMS/SKUS AVAILABLE ON SHELF

Feb 2016

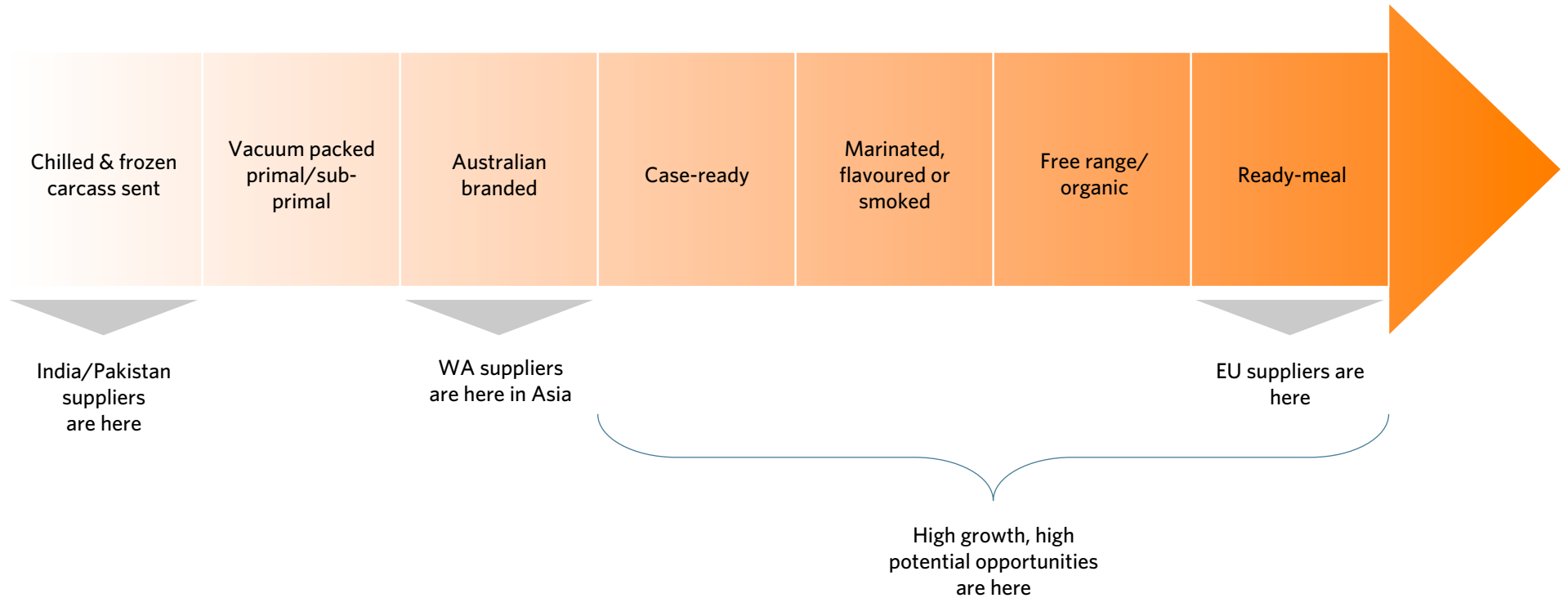


WHAT IS WA CAPABLE OF DELIVERING? STRATEGIC DIRECTION

Western Australian processors need to continue to move forward through improved product development and presentation

SUGGESTED STRATEGIC DIRECTION: WESTERN AUSTRALIAN CHILLED PORK

Model; 2016



WHAT IS WA CAPABLE OF DELIVERING? CLAIMS

Multiple potential positions exist to develop a premium chilled pork offer for Asia

IDENTIFIED POTENTIAL PREMIUM POSITIONS

Model; 2016



- High in protein
- High in iron
- Gluten free
- Antibiotic free
- No added hormones
- No artificial ingredients
- All natural
- No preservatives

- Identified source region
- Organic
- Specialty breed
- Track & trace
- Free to graze/free range
- Farmer's story

- Gift packaging
- Marinated
- Tender guarantee
- Smoked flavour

- Serving for one
- Oven ready
- Ready-to-cook

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 chilled pork offer

EXAMPLES OF PREMIUM PRODUCTS FROM OTHER MARKETS

Select; 2016



- Case-ready
- Outdoor bred
- British pork
- British flag
- "Finest"
- Hampshire Cross Bred

- Case-ready
- Succulent
- Free range
- British pork
- Simply grill for 18-22 min
- From a small group of carefully selected farmers
- Sustainable farming
- Sired by pedigree Hampshire boars
- Assured food standards

- Case-ready
- Always Tender
- Extra Lean
- Teriyaki marinade

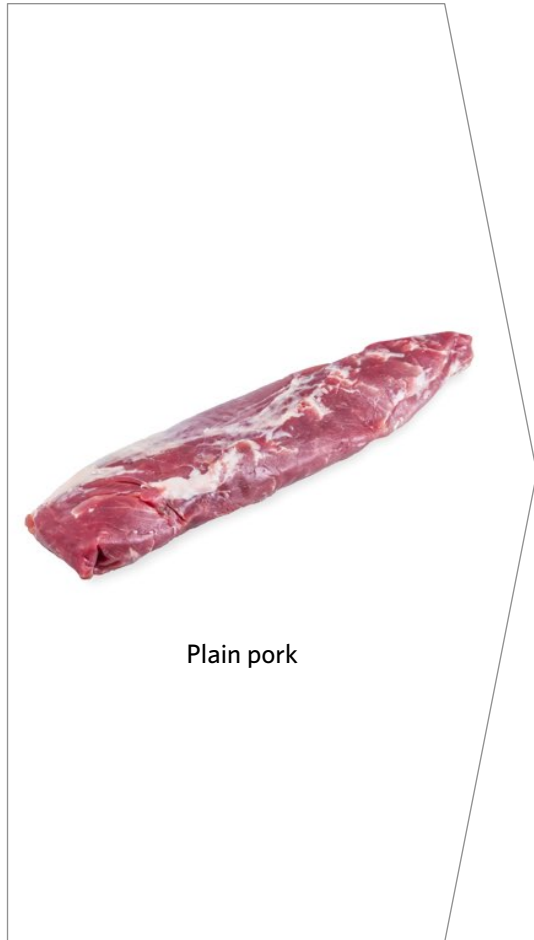
- Case-ready
- No artificial ingredients
- All natural
- Product of USA
- No preservatives
- No added steroids or growth hormones
- Working towards true sustainability

WHAT IS A POTENTIAL WA OFFER?

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

HYPOTHETICAL EXAMPLE OF POTENTIAL PREMIUM PRODUCT FROM WA

Model; 2016



High in protein

High in iron



From Margaret River

Farmer's story

Australian Flag



Marinated with local flavours

Bred for tenderness



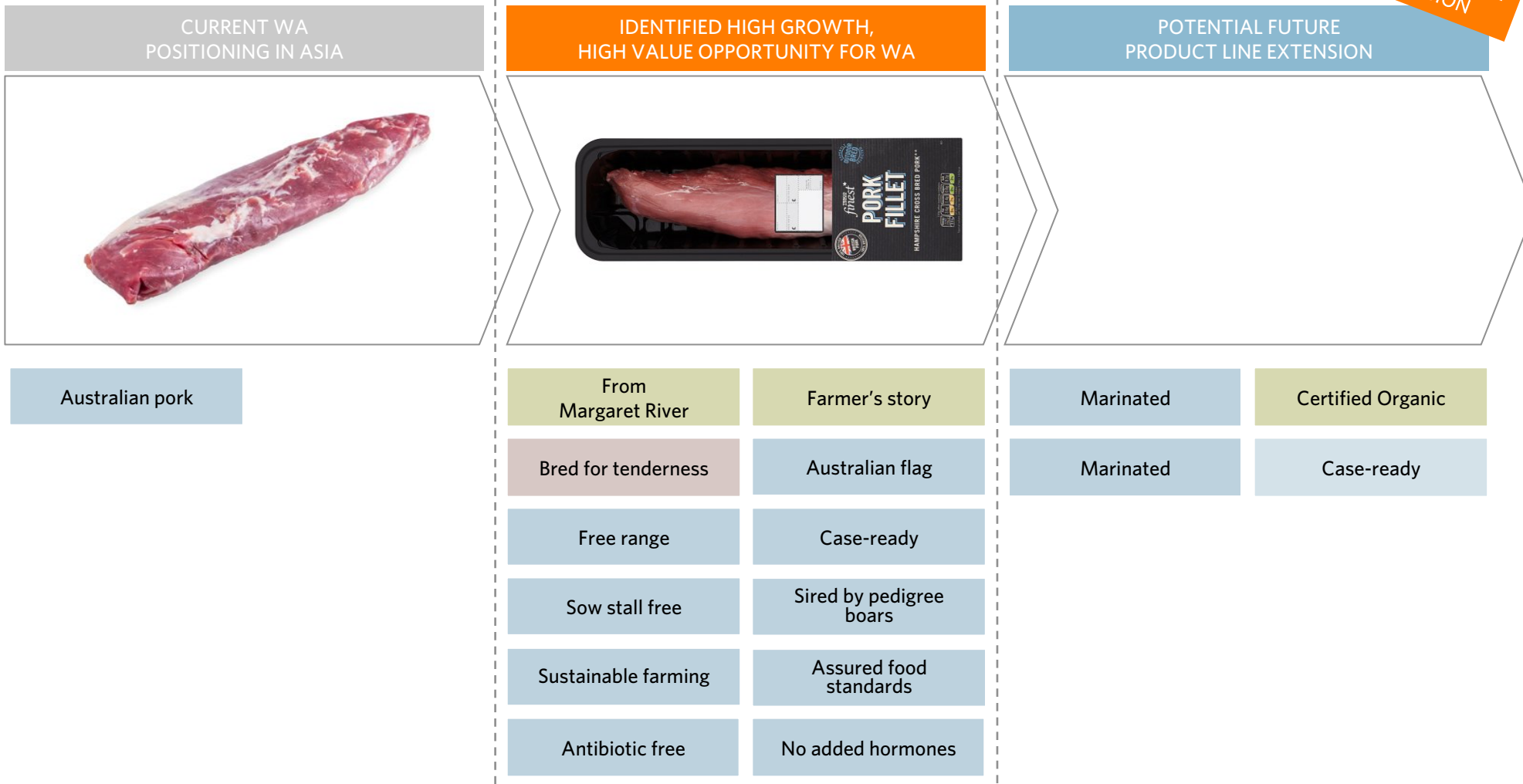
Case-ready

WHAT IS THE IDENTIFIED OPPORTUNITY?

As a “Straw Man” for discussion, we identify an opportunity for a high value, premium chilled pork product with select characteristics for export market launch

THOUGHT STARTER
“STRAW MAN” MODEL
FOR DISCUSSION

PRELIMINARY “STRAW MAN” DEVELOPMENT & ROLLOUT PLAN FOR CHILLED PORK OPPORTUNITY *Model; 2016*



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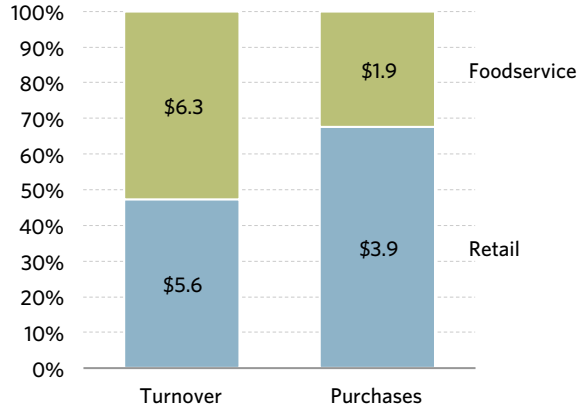


FOCUS MARKET - 1 - SINGAPORE

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

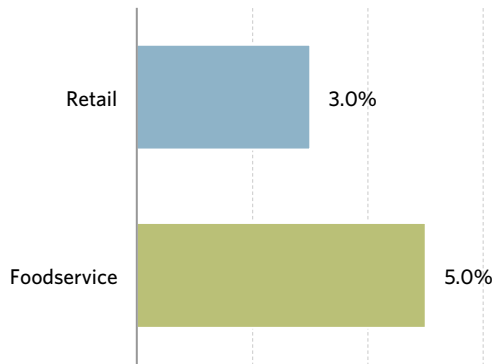
TURNOVER & PURCHASES

US\$b; 2014



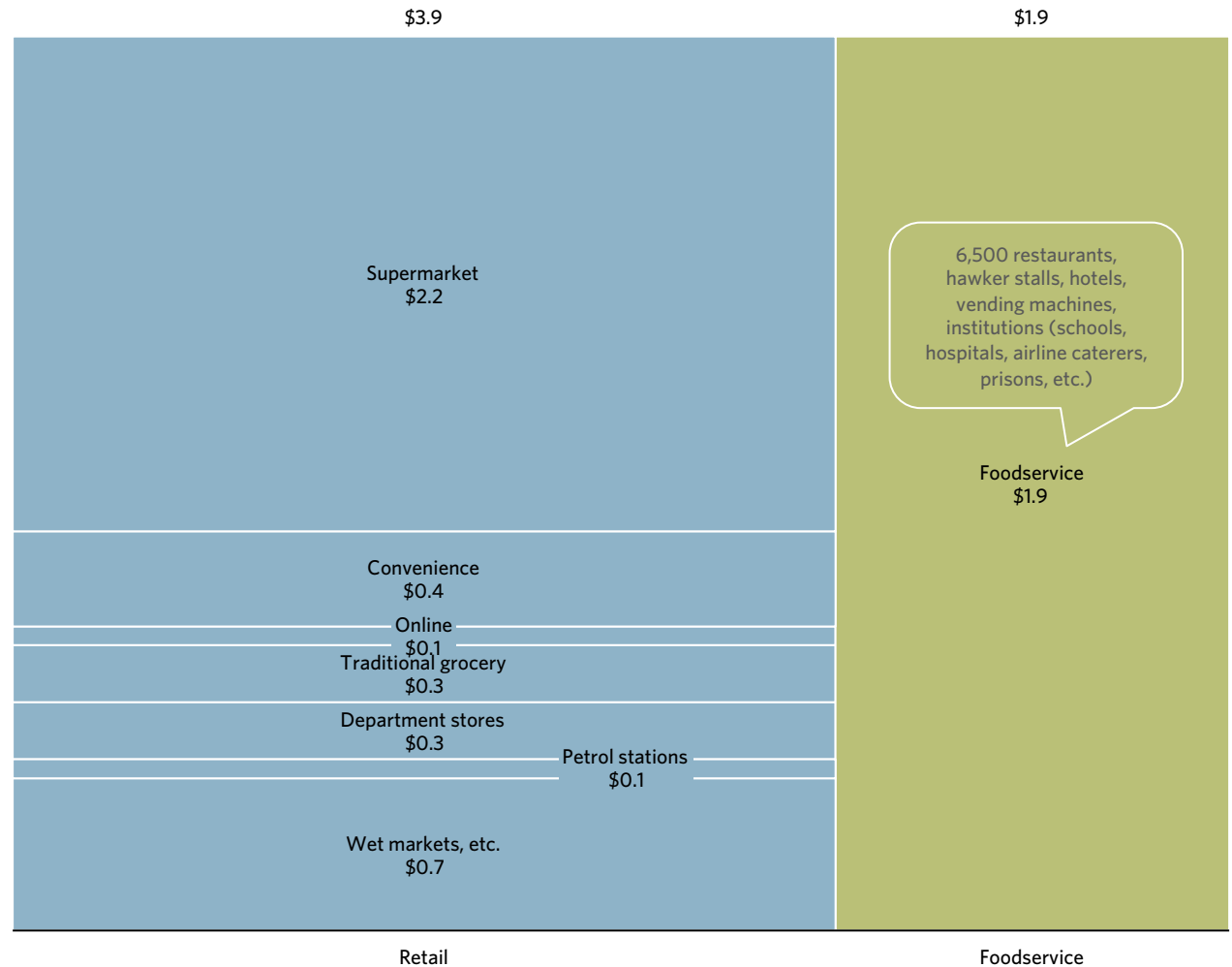
TURNOVER GROWTH RATE

% Y-O-Y; HK\$; 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

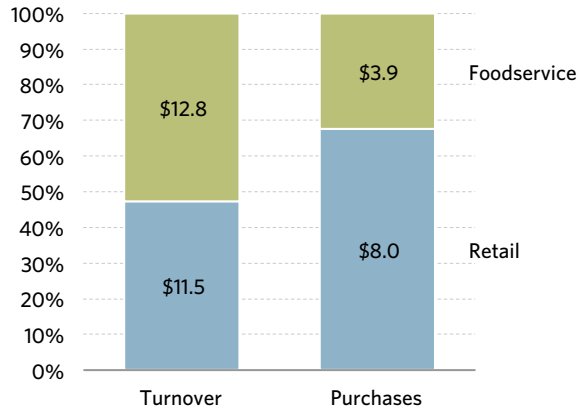
				
Firm	NTUC Fairprice	Cold Storage	Sheng Siong	Prime Supermarkets
Ownership	National Trade Union Council (Singapore)	Dairy Farm International (Hong Kong)	Listed; Singapore	Private; Singapore
Website	www.fairprice.com.sg www.ntuc.org.sg	www.coldstorage.com.sg www.dairyfarmgroup.com	www.shengsiong.com.sg 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

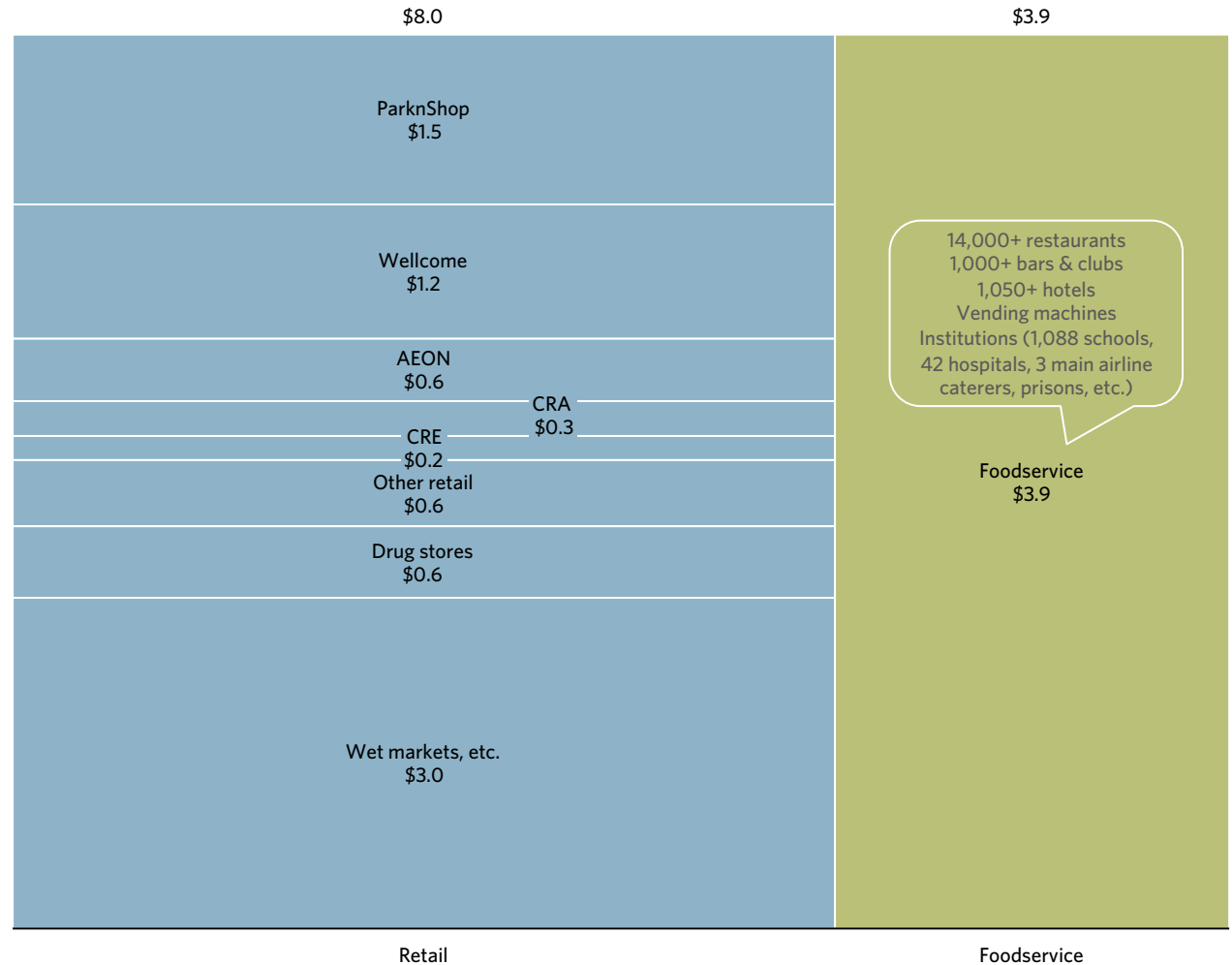
TURNOVER & PURCHASES

US\$b; 2014



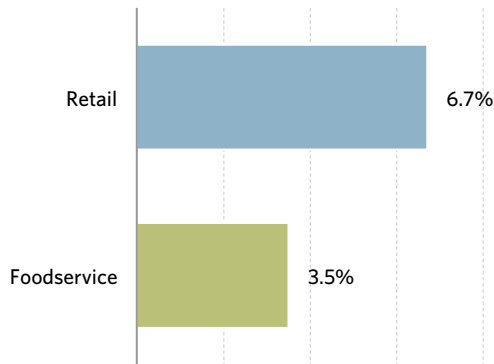
ESTIMATED WHOLESALE FOOD & FMCG PURCHASES

US\$b; 2014



TURNOVER GROWTH RATE

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



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

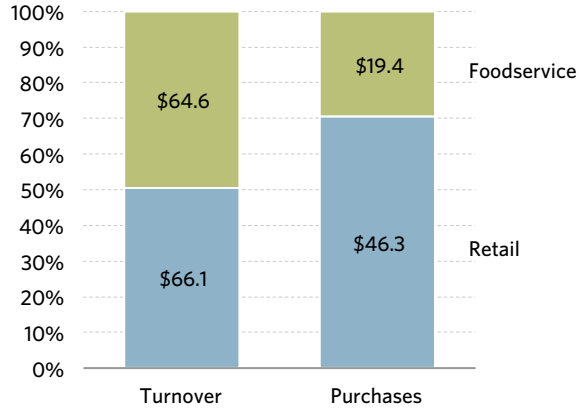
							
Firm	Wellcome	Park'N Shop	CR Vanguard	Dah Chong Hong	759 Stores	AEON Stores	Convenience Retail Asia
Ownership	Dairy Farm International/Jardine Matheson	A.S. Watson/Hutchison Whampoa	CRE/China Resources (SOE; China)	Dah Chong Hong/CITIC Pacific/CITIC (SOE; China)	Private; Hong Kong (Lam Wai Chun)	AEON (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 - SOUTH KOREA

South Korea has a robust and well-developed food retailing and foodservice sector

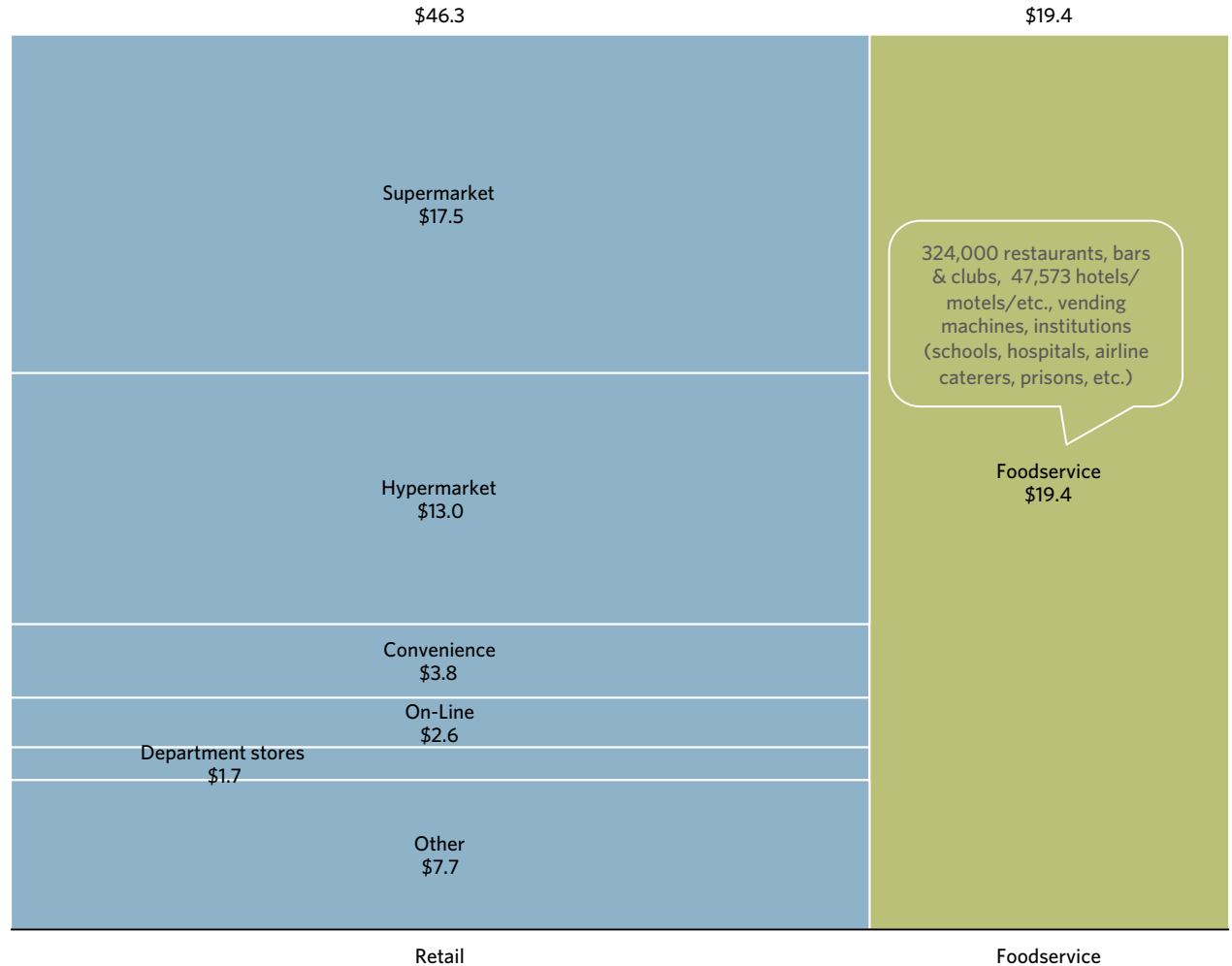
TURNOVER & PURCHASES

US\$b; 2014



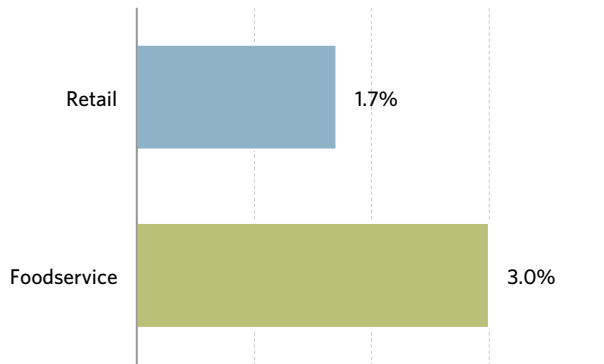
ESTIMATED WHOLESALE FOOD & FMCG PURCHASES

US\$b; 2014



TURNOVER GROWTH RATE

% Y-O-Y; KRW; 2013v2014














FOCUS MARKET – 3 – SOUTH KOREA

Six potential in-market partners are identified for Western Australian firms in South Korea

POTENTIAL IN-MARKET PARTNERS – SOUTH KOREA

2015 or as available

						
Firm	E-Mart	Homeplus Co.	Lotte Shopping Co.	GS Retail Co.	E. Land Retail	BGF Korea
Ownership	Shinsegae	Private Equity (MBK Partners, Canadian Pension Fund, Temasek (SG))	Lotte Group (Korea)	GS Holdings (Korea; listed)	E Land Group (Korea; listed)	BGF (Korea; listed)
Website	www.shinsegae.com emart.ssg.com	www.homeplus.co.kr	www.lottemart.com www.lottesuper.co.kr www.7-eleven.co.kr	www.gsretail.com www.gsholdings.com	www.newcore.co.kr www.eland.com	www.bgfretail.com
Annual sales (retail)	US\$15.2b	US\$10.6b	US\$18.2b	US\$5.1b	US\$2.3b	US\$2.6b
Store formats	Hypermarket Supermarkets Department stores	Hypermarket Supermarket	Hypermarket Supermarket Department stores Convenience stores	Supermarket Convenience Petrol stations	Hypermarket 19 Department stores Clothing stores Restaurants	Convenience 7,939
# of stores	E Mart 148 E Mart Everyday 132 Shinsegae	Home Plus 139 Home Plus Express 286	Lotte Mart 108 Lotte Super Market 496 7-Eleven 7,213	GS Supermarket 254 GS25 7,774 GS Caltex	New Core 19 Kim's Club NewCore Outlet, 2001 Outlet DongA Department Store	CU 8,000+
Store fascia (select)	 SHINSEGAE	 Home plus Express	 LOTTE Mart LOTTE Super LOTTE DEPARTMENT STORE LOTTE Homeshopping 7-ELEVEN	 gs Supermarket GS25 GS Caltex	 NEWCORE KIM'S CLUB mart	 COU

DOCUMENT STRUCTURE

What is the global situation?

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>CRAIG MOSTYN GROUP</p>  <p>CRAIG MOSTYN GROUP FOOD & AGRIBUSINESS</p>	<p>GD PORK</p> 	<p>MILNE AGRIGROUP</p> 
<p>ADDRESS: Level 1, 6 Short Street, Fremantle, WA 6160</p>	<p>ADDRESS: 172 Collins Rd, Blythewood, WA 6208</p>	<p>ADDRESS: 103 Welshpool Rd, Welshpool, WA 6106</p>
<p>PHONE: 08 9335 6244</p>	<p>PHONE: 08 9534 1150</p>	<p>PHONE: 08 9351 0750</p>
<p>WEBSITE: www.craigmostyn.com.au</p>	<p>WEBSITE: www.gdpork.com.au</p>	<p>WEBSITE: www.milne.com.au</p>

<p>WESTPORK</p>	<p>DARDANUP BUTCHERING COMPANY (DBC)</p> 
<p>ADDRESS: 67 Central Avenue, Redcliffe, WA 6104</p>	<p>ADDRESS: Wimbridge Road, Picton WA 6229</p>
<p>PHONE: 08 9479 7456</p>	<p>PHONE: 08 9780 6000</p>
<p>WEBSITE: none</p>	<p>WEBSITE: www.dbctalkabouttaste.com.au</p>

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New Zealand
+64 9 623 1848

www.coriolisresearch.com

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.

