



TARGET MARKET OPPORTUNITIES IN ASIA FOR ROLLED OATS

Part of Asia Market Success, April 2016



Department of
Agriculture and Food



ROYALTIES
FOR REGIONS

CORIOLIS

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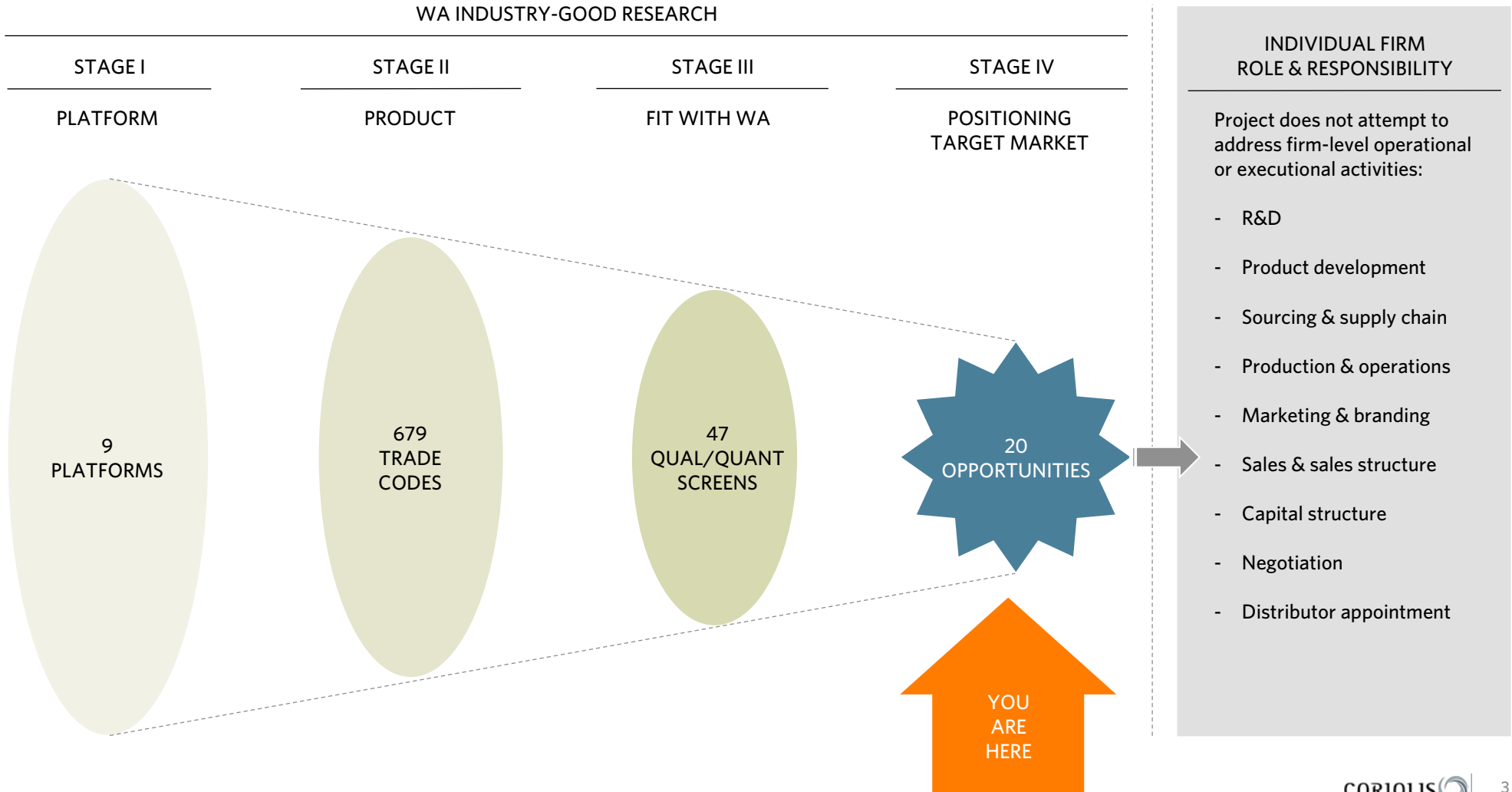
FINAL v100; April 2016

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

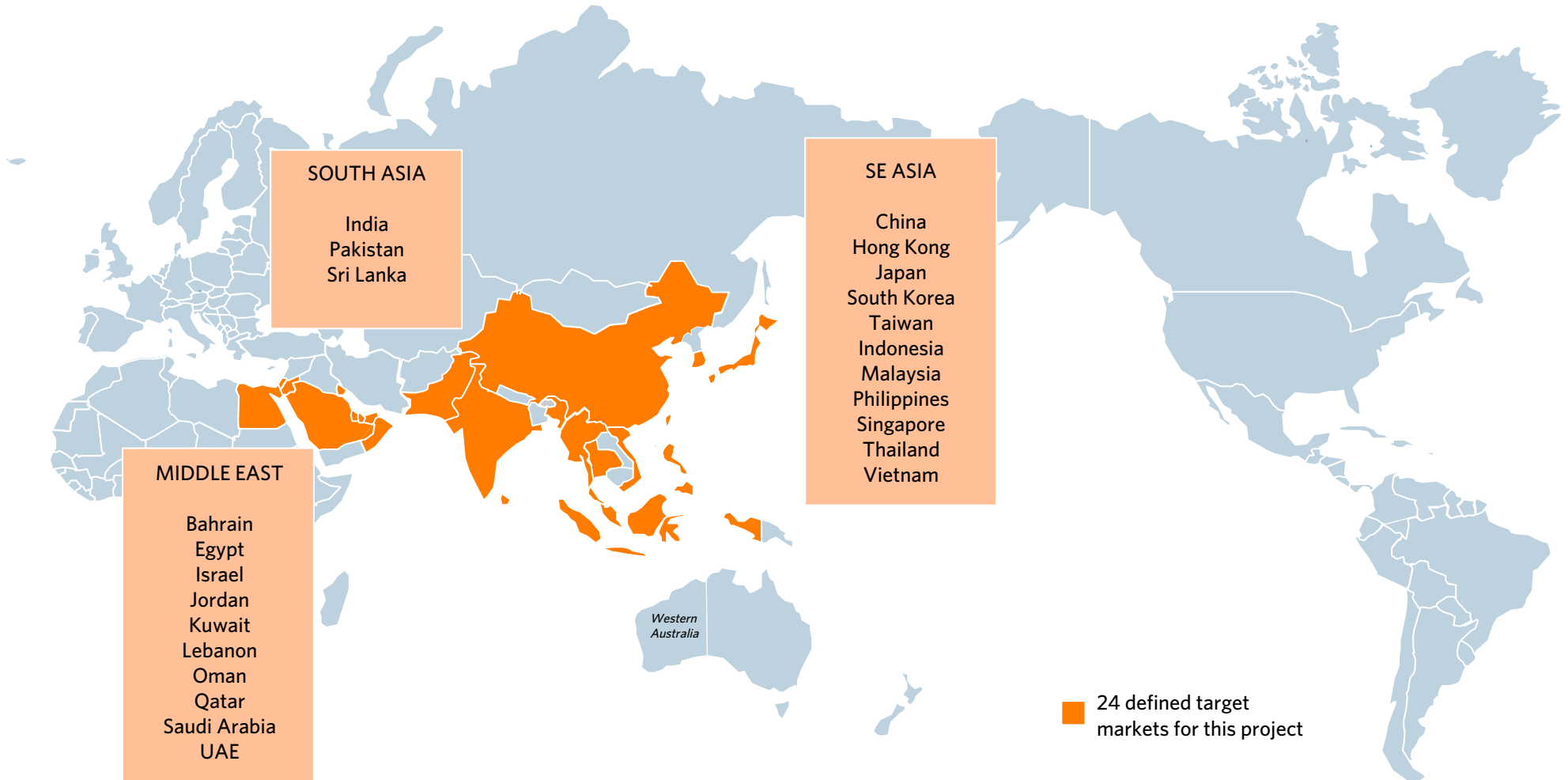
Model; 2016



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; 2016



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

WHAT IS THE PRODUCT?

Rolled oats emerged in Phase I as one of twenty “high growth, high potential” opportunities for Western Australia; rolled oats are steamed, rolled and toasted; can be consumed as porridge or further processed

PRODUCT OVERVIEW

Example; 2014

PRODUCT PROFILE	
HS Code	110412
Product	Rolled or flaked oats
Out-of-scope	Oat flour, groats, meal, pellets, other grains, processed food containing oats, etc. as all are covered under other screened trade codes
Origin	Domesticated oats first appear in Europe during the Bronze Age
Example ingredients	Oats
Forms/usage	<ul style="list-style-type: none">- Food ingredient in manufacturing (e.g. muesli, extruded cereals, snack bars, biscuits, beverages, baby food)
Drivers of consumer/market success	<ul style="list-style-type: none">- Health benefits of oats; endorsed by medical profession (beta-glucan; lowers cholesterol)- Extremely versatile food processing ingredient- Growing Westernisation of diet increasing demand for breakfast products

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 is well-positioned to grow rolled oats exports to Asia

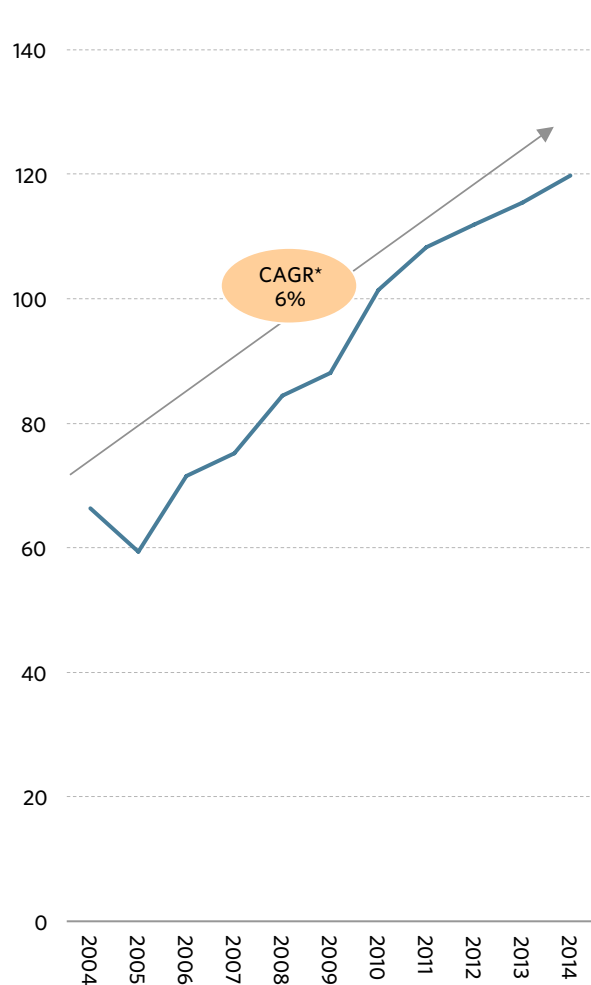
- Asian rolled oats imports are rising, with import value growth being driven by a combination of expanding tonnage and increasing average FOB (free-on-board) prices
- Asian & Middle Eastern rolled oats imports come primarily from Australia and the UK; there is also a significant amount of inter-Asia trade, including further processed (e.g. Quaker Malaysia)
 - Australia and the UK are driving rolled oats trade value growth into Asia & the Middle East over the past decade
 - Australia is driving market growth over the past five years
 - Average FOB price to target Asian markets vary by supplier; this is driven by level of processing
- Rolled oats go to a wide number of the target markets, with no single country predominating; Malaysia, Saudi, India and China stand out as larger markets
 - Growth in rolled oats imports is broad based and coming from across multiple markets
 - Growth varies by market, with India, Japan, Malaysia and Israel standing out as leaders
 - Average rolled oats import prices vary significantly by country, with Saudi, China and the UAE standing out as good markets that pay well
 - Imported rolled oats consumption and aggregate imports appear partially driven by income per capita; a number of markets appear to have long-run penetration upside
- Market share varies by country; the UK strong in Middle East, USA/Canada strong in S. Korea, Australia strong across SE Asia and India
- Western Australia has opportunities for rolled oats export growth, both in traditional SE Asian markets and elsewhere
- Data supports new high value, premium rolled opportunities being initially launched in (1) Japan, (2) Hong Kong and (3) China
- As a “Straw Man” for discussion, we identify an export market roll-out plan

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

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

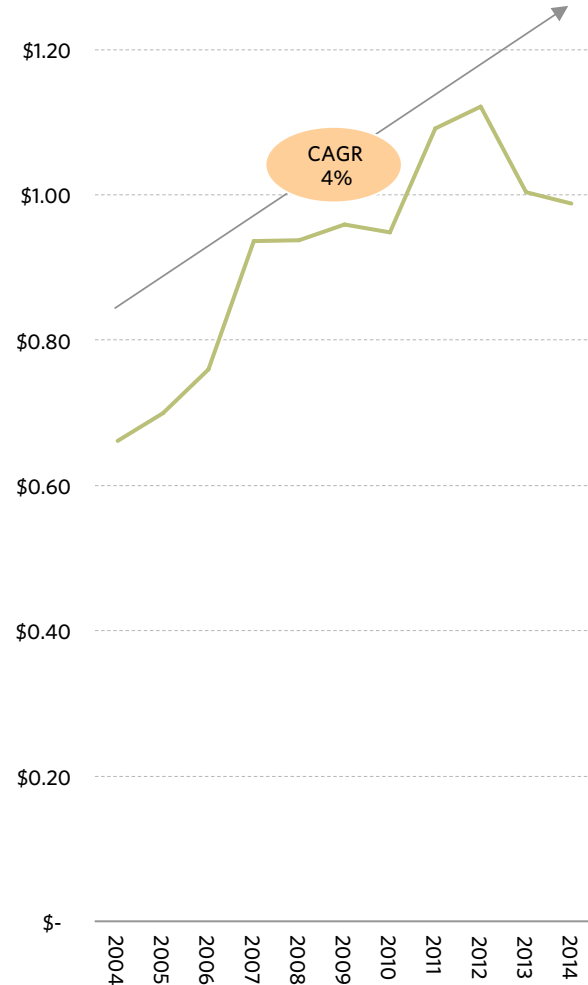
VOLUME

T; 000; 2004-2014



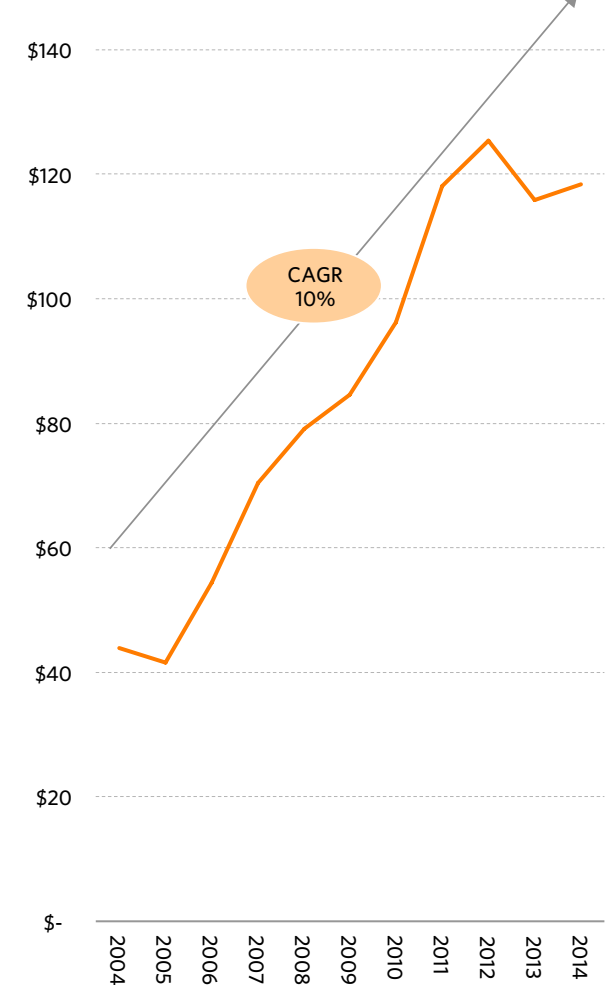
AVERAGE PRICE PER KILOGRAM

US\$; 2004-2014



VALUE

US\$m; 2004-2014



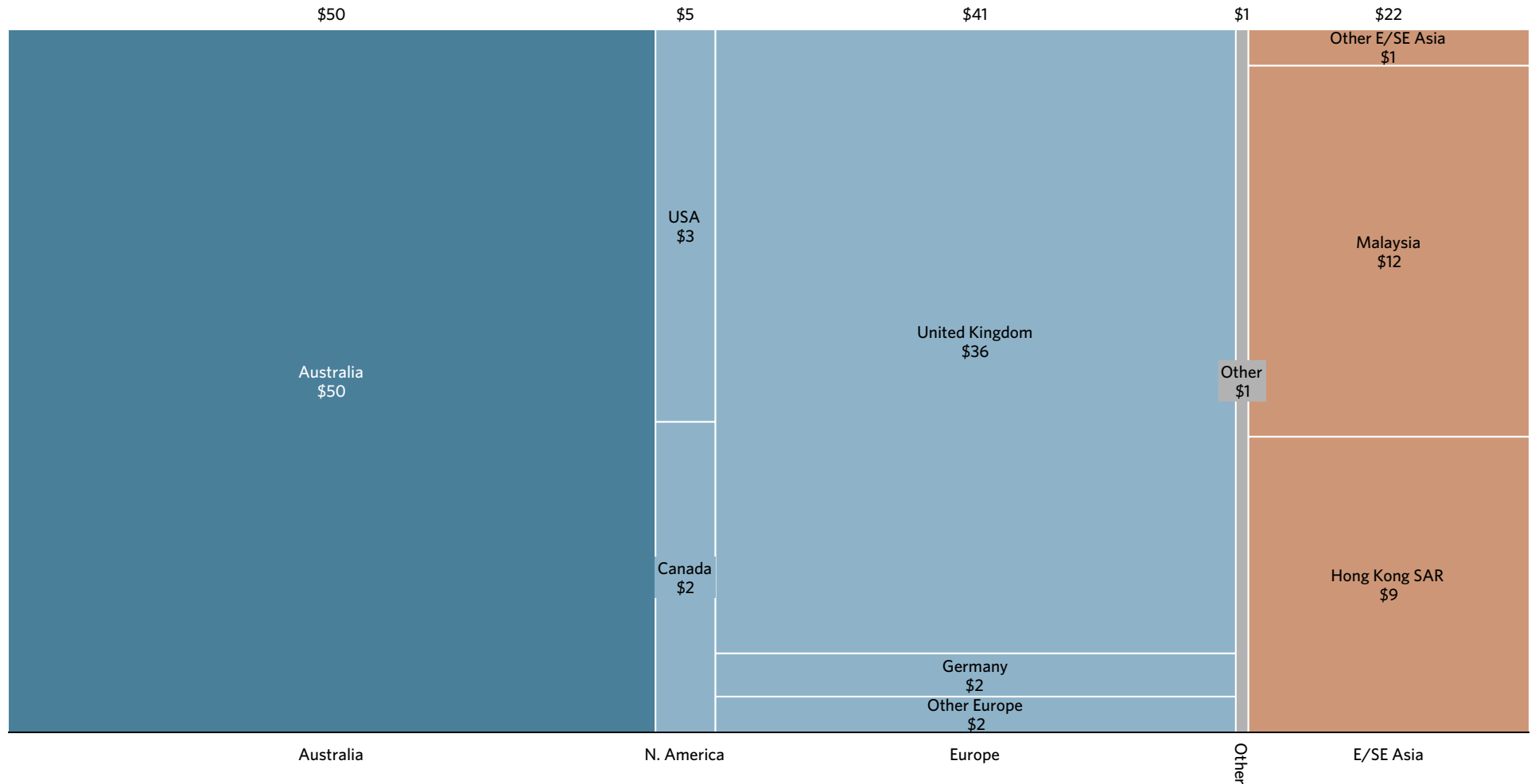
* Compound Annual Growth Rate; Source: UN Comtrade database; Coriolis analysis and classifications

Asian & Middle Eastern rolled oats imports come primarily from Australia and the UK; there is also a significant amount of inter-Asia trade, including further processed (e.g. Quaker Malaysia)

EXPORT VALUE BY SUPPLIER TO TARGET REGION

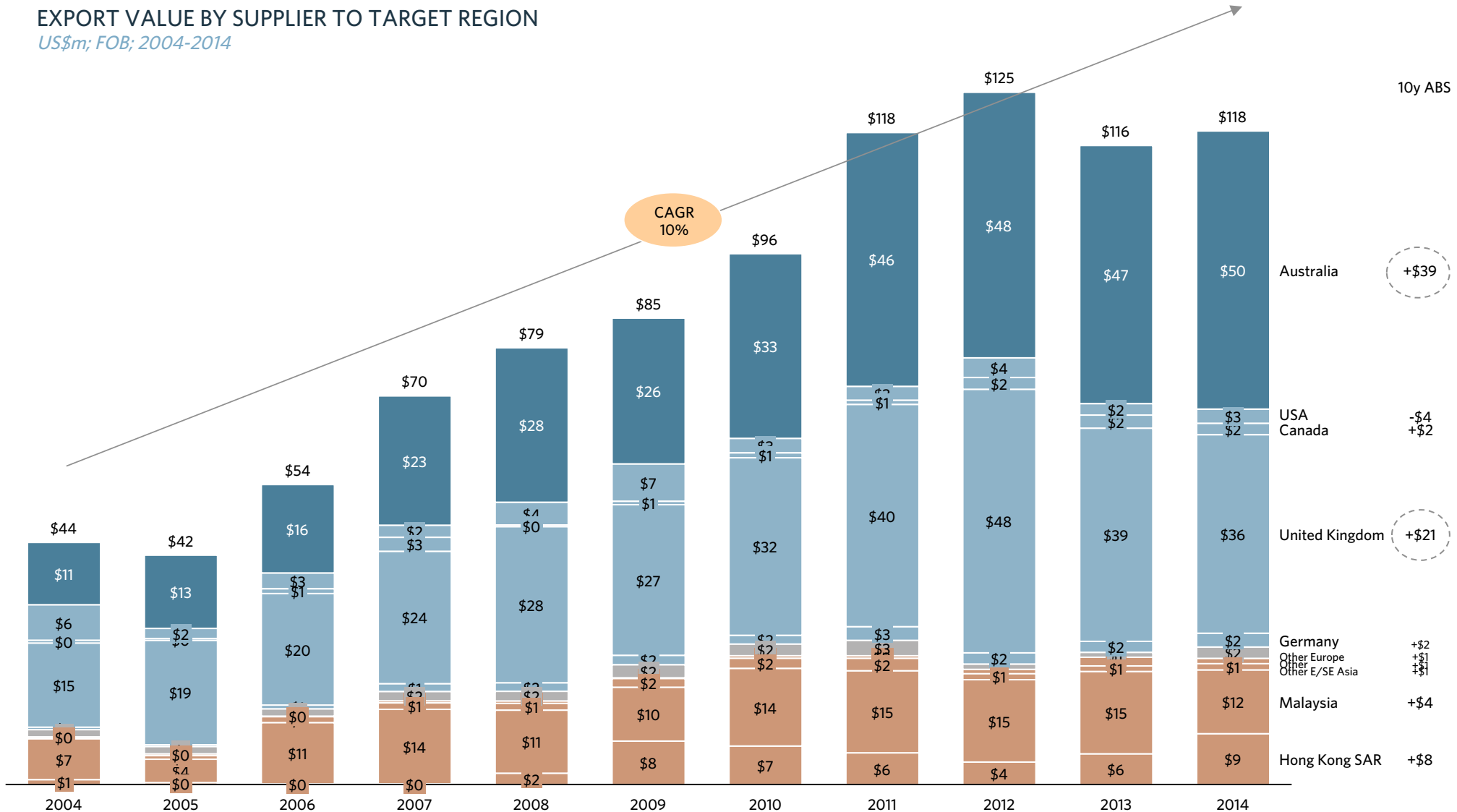
US\$m; FOB; 2014

TOTAL = US\$118m



Australia and the UK are driving rolled oats trade value growth into Asia & the Middle East over the past decade

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

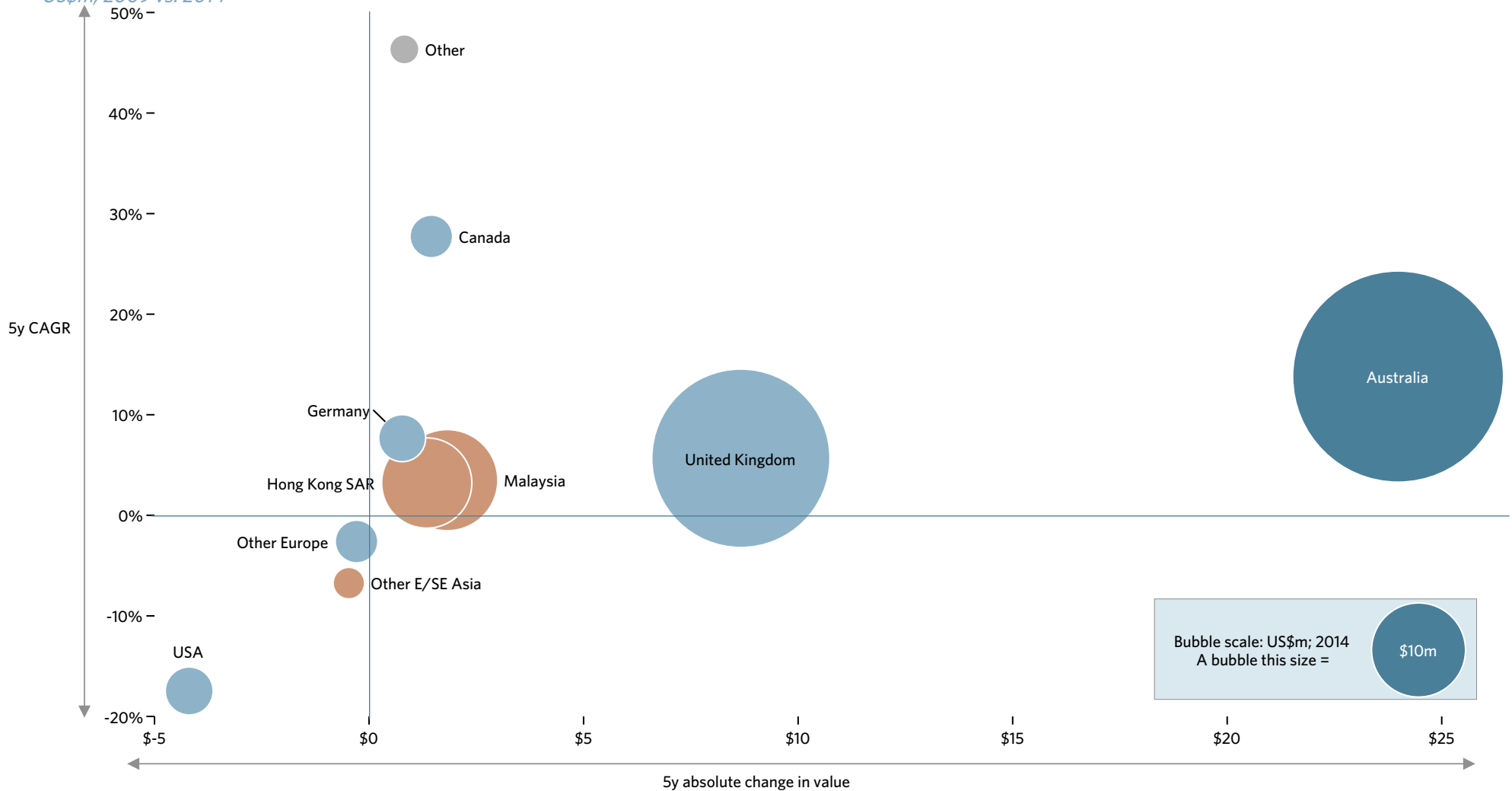


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Australia is driving market growth over the past five years

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

US\$m; 2009 vs. 2014

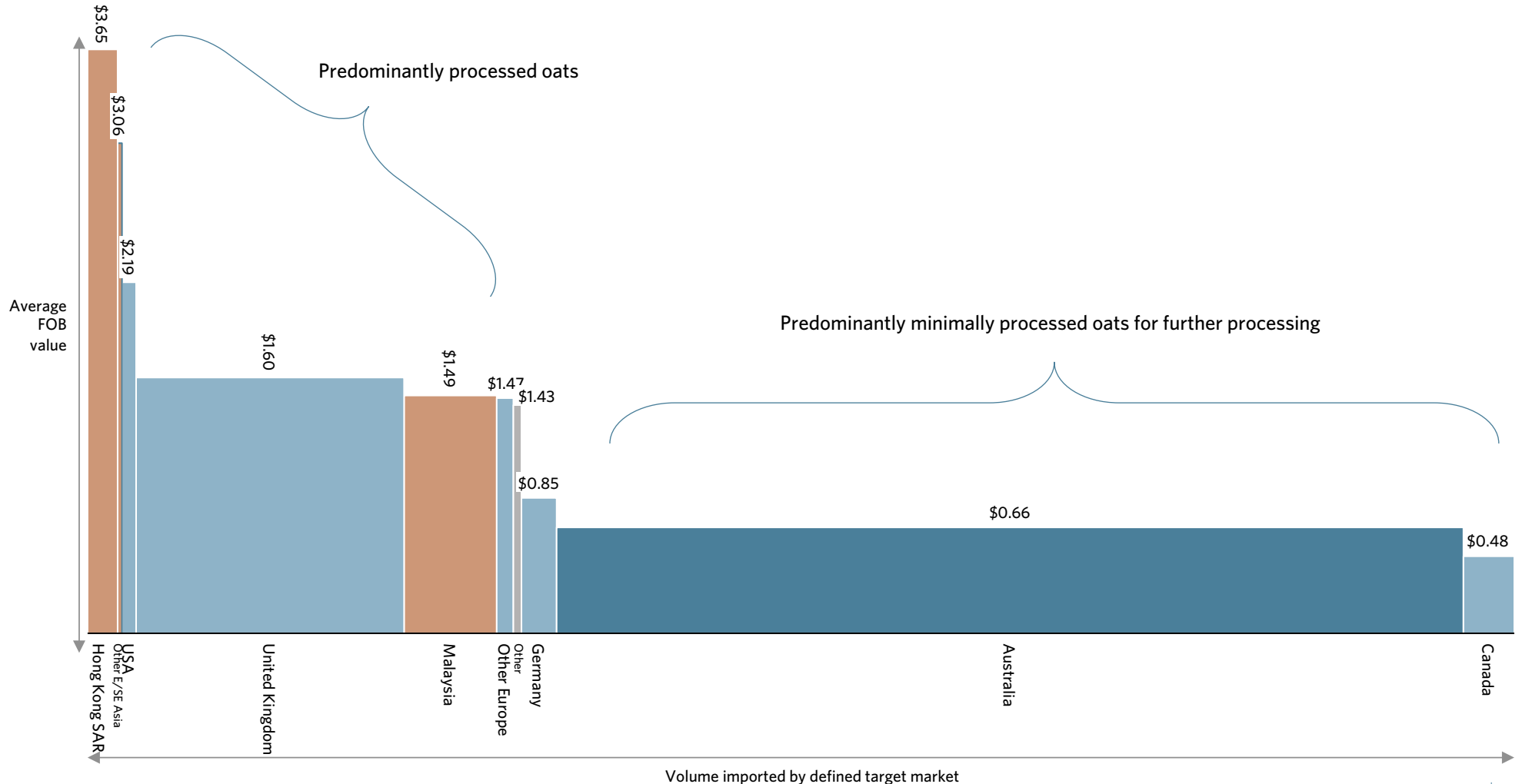


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Average FOB price to target Asian markets vary by supplier; this is driven by level of processing

AVERAGE EXPORT VALUE COST CURVE BY SUPPLIER

US\$/kg; t; FOB; 2014



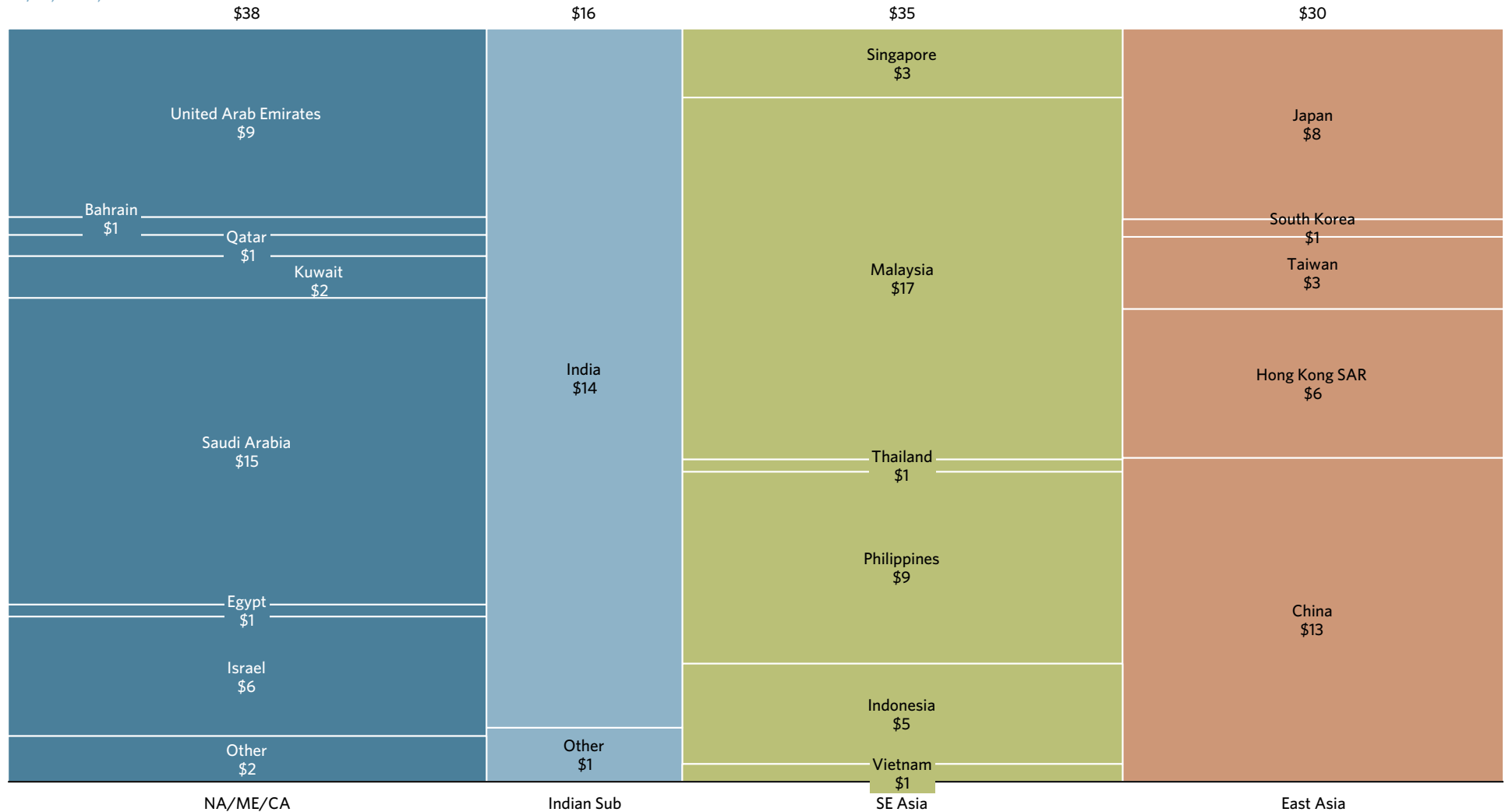
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Rolled oats go to a wide number of the target markets, with no single country predominating; Malaysia, Saudi, India and China stand out as larger markets

IMPORT VALUE BY MARKET BY REGION

US\$m; FOB; 2014

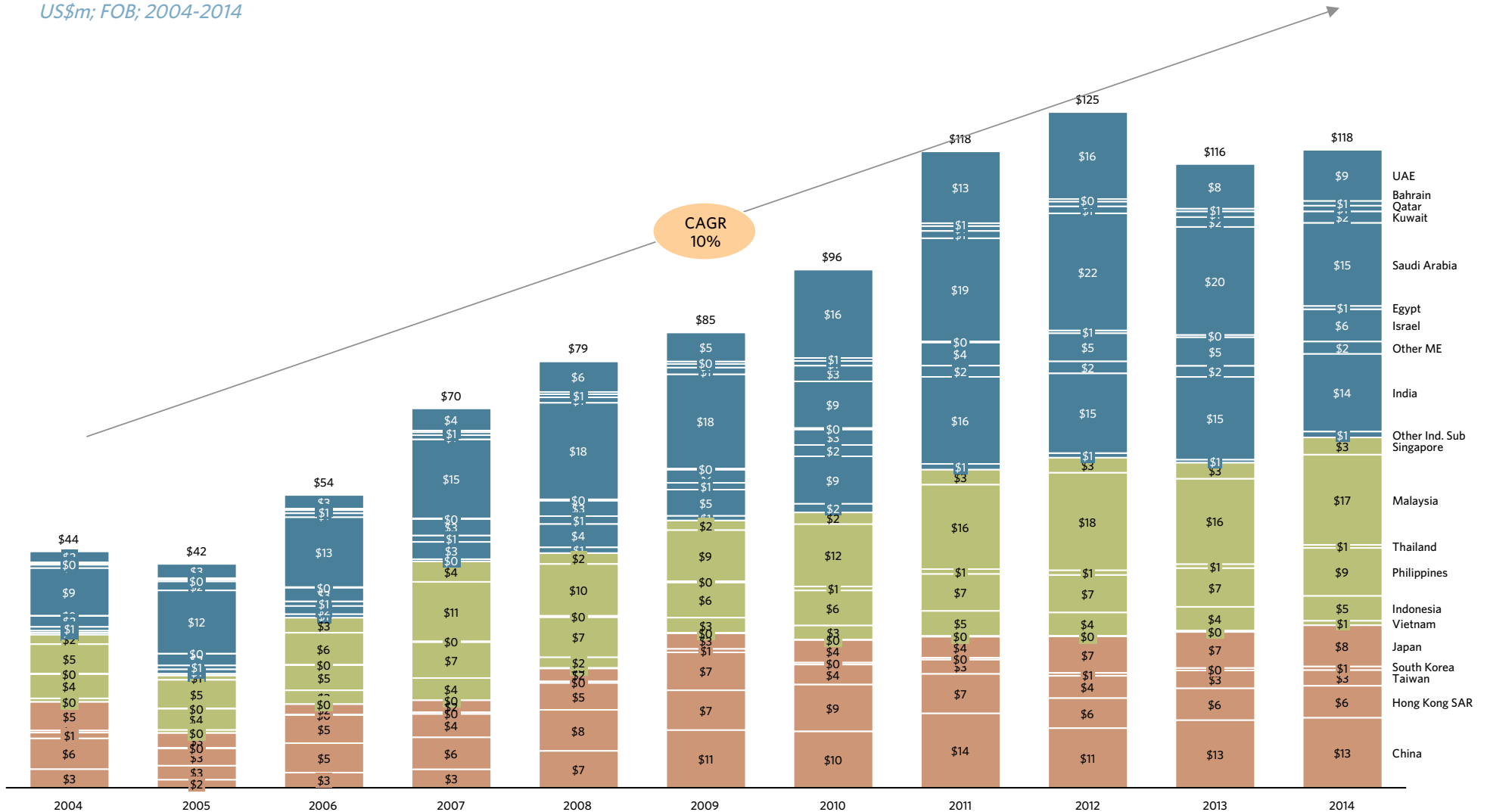
TOTAL = US\$118m



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

Growth in rolled oats imports is broad based and coming from across multiple markets; however imports appear to have levelled out 2011 onward

IMPORT VALUE BY MARKET BY REGION
 US\$m; FOB; 2004-2014

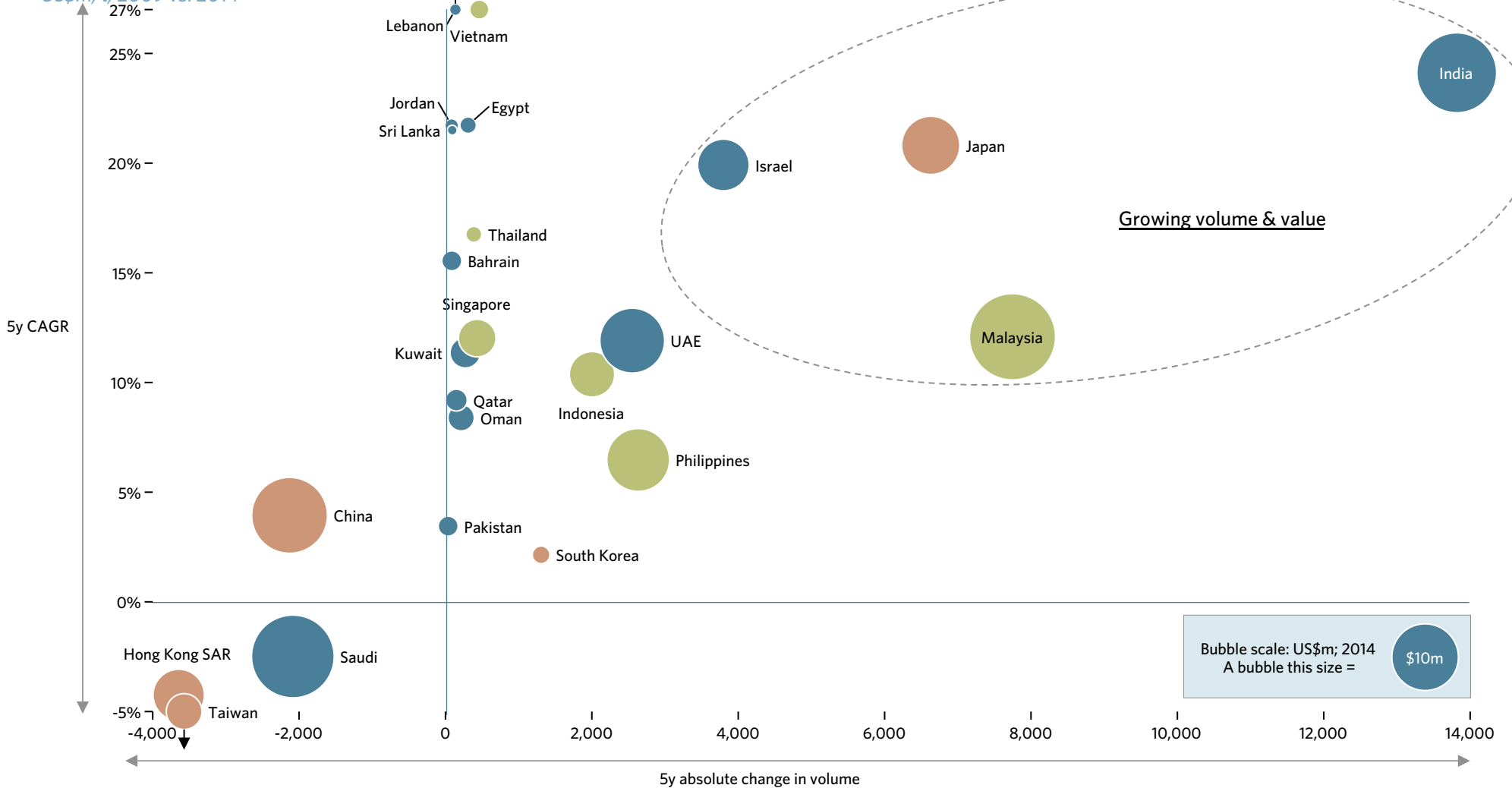


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Growth varies by market, with India, Japan, Malaysia and Israel standing out as leaders

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

US\$m; t; 2009 vs. 2014

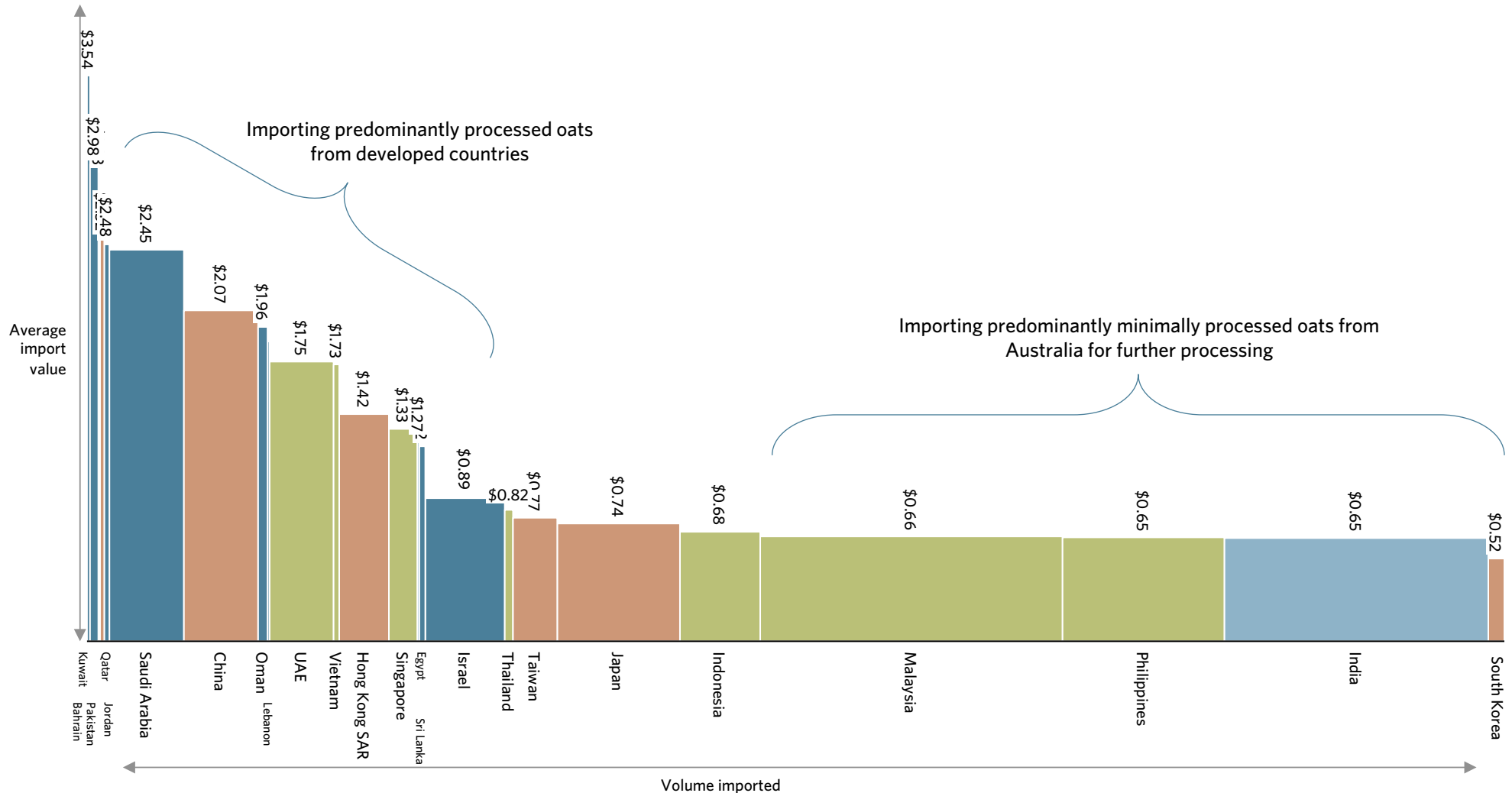


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Average rolled oats import prices vary significantly by country, with Saudi, China and the UAE standing out as good markets that pay well

AVERAGE IMPORT VALUE COST CURVE BY MARKET/REGION

US\$/kg; t; FOB; 2014

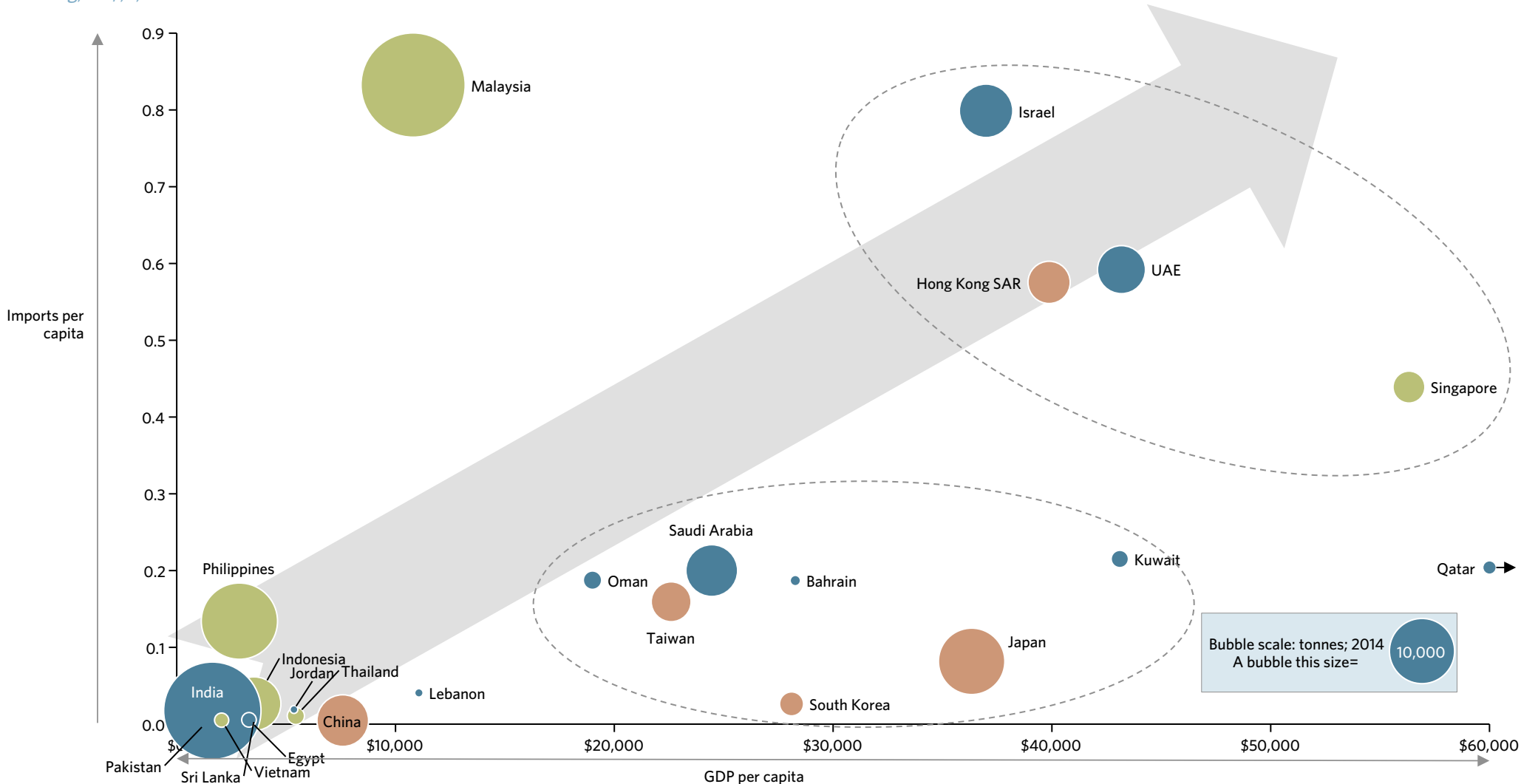


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Imported rolled oats consumption and aggregate imports appear partially driven by income per capita; a number of markets appear to have long-run penetration upside

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

Kg; US\$; t; 2014

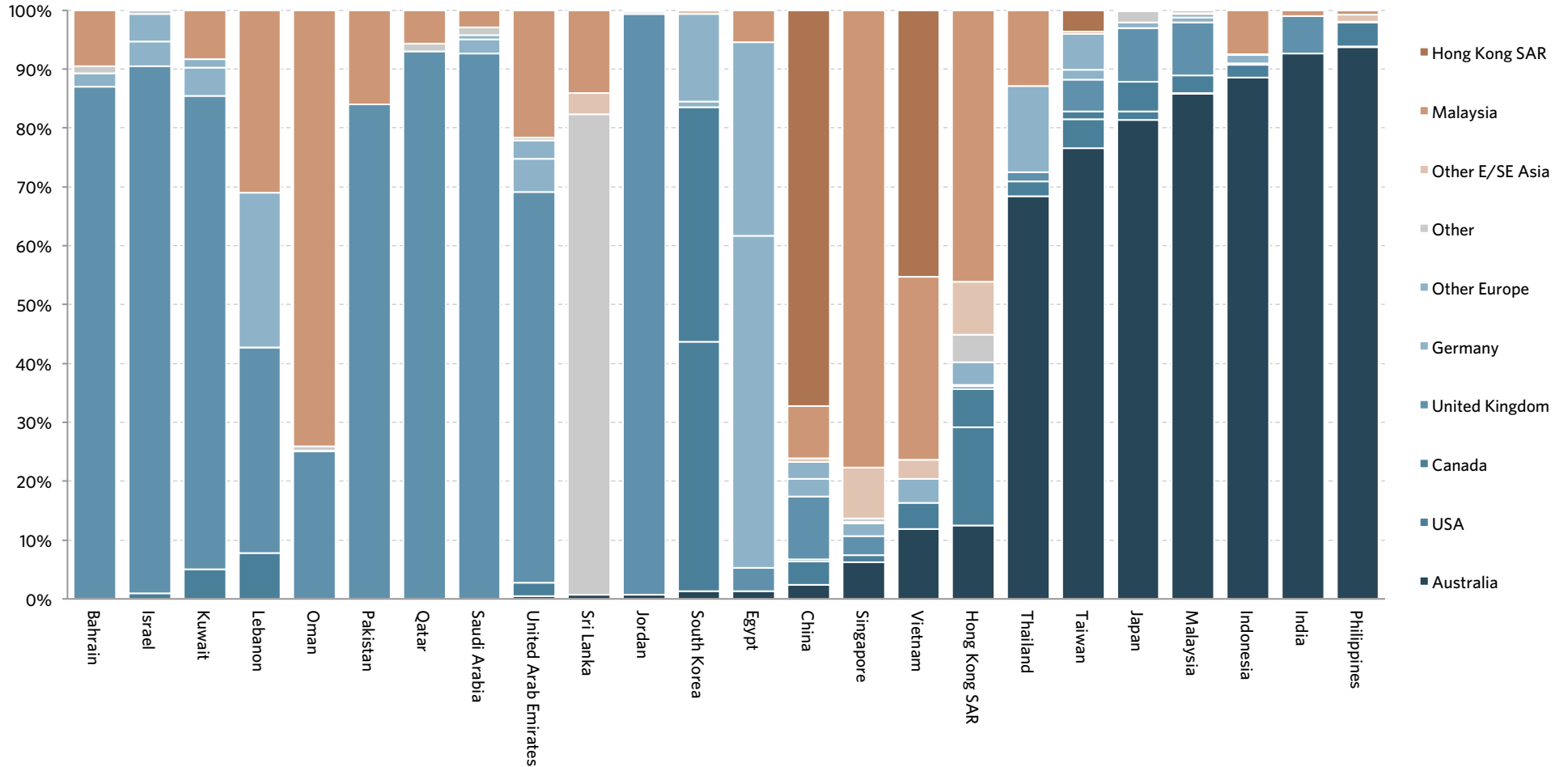


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Wikipedia (GDP/capita); Coriolis analysis and classifications

Market share varies by country; the UK strong in Middle East, USA/Canada strong in S. Korea, Australia strong across SE Asia and India

IMPORT VALUE MARKET SHARE BY MARKET BY KEY SUPPLIER

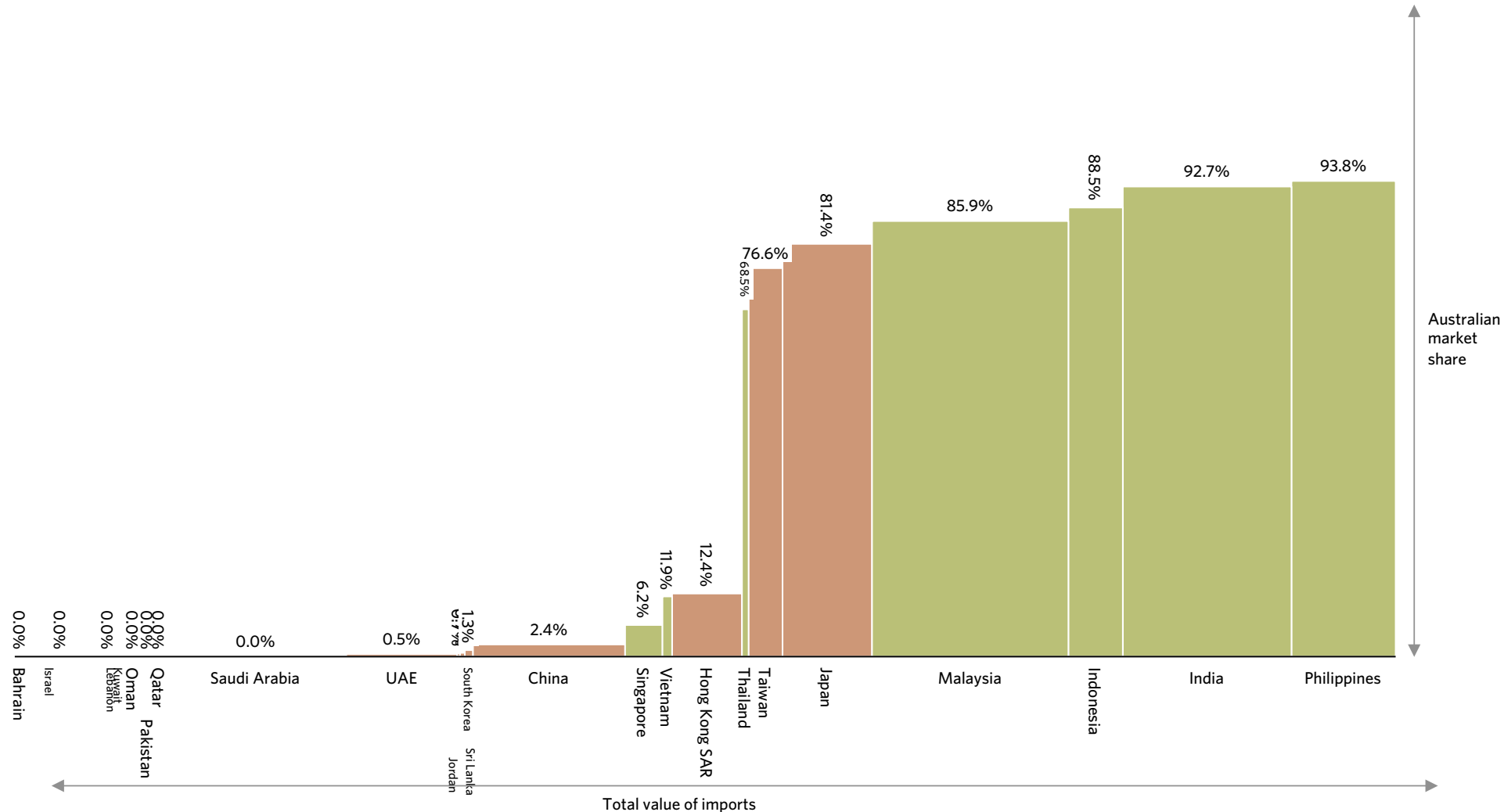
% of value in US\$m; FOB; 2014



Western Australia has opportunities for rolled oats export growth, both in traditional SE Asian markets and elsewhere

AUSTRALIAN IMPORT VALUE MARKET VS. MARKET VALUE

US\$m; FOB; 2014

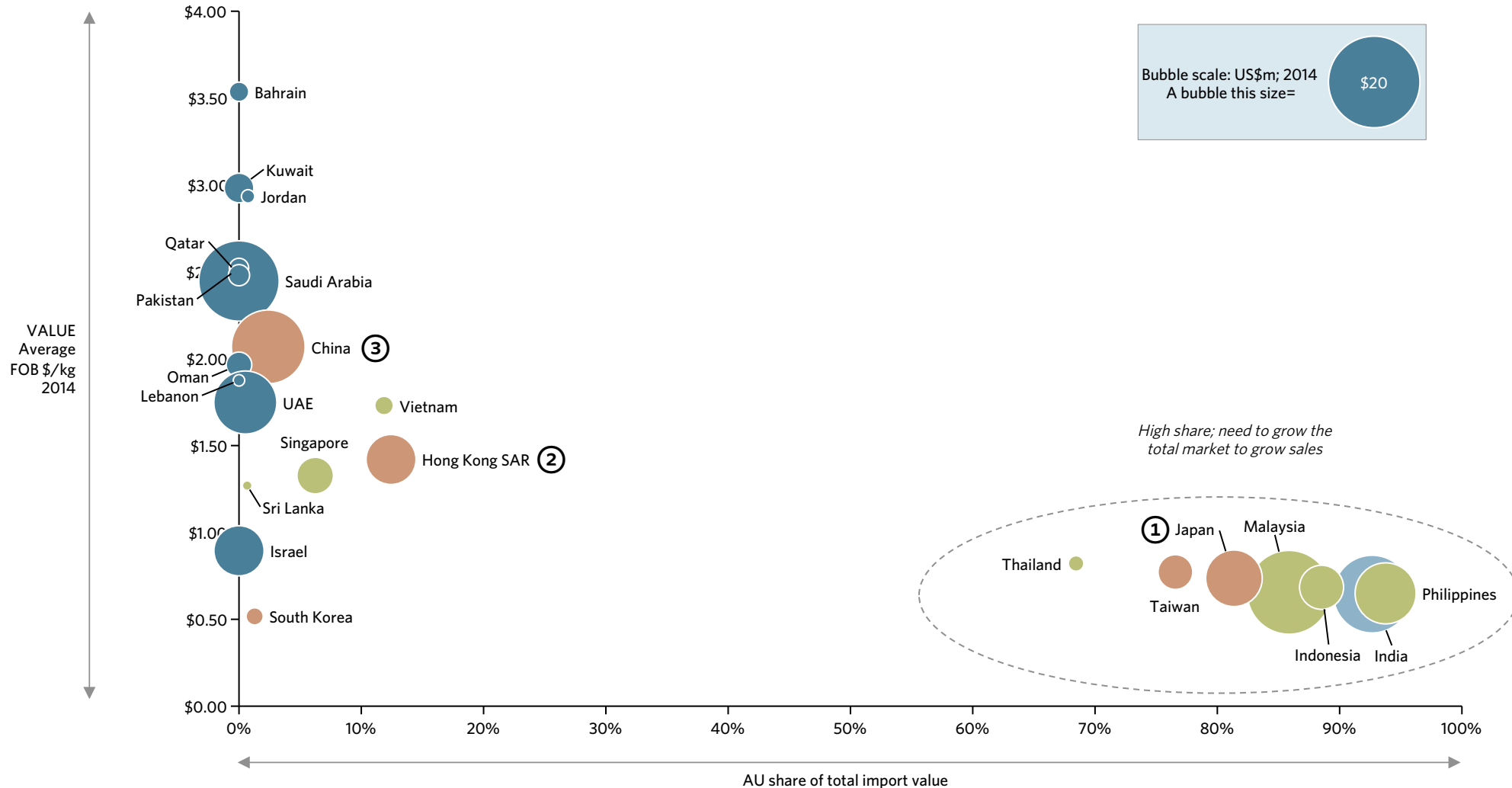


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Data supports new high value, premium rolled opportunities being initially launched in (1) Japan, (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



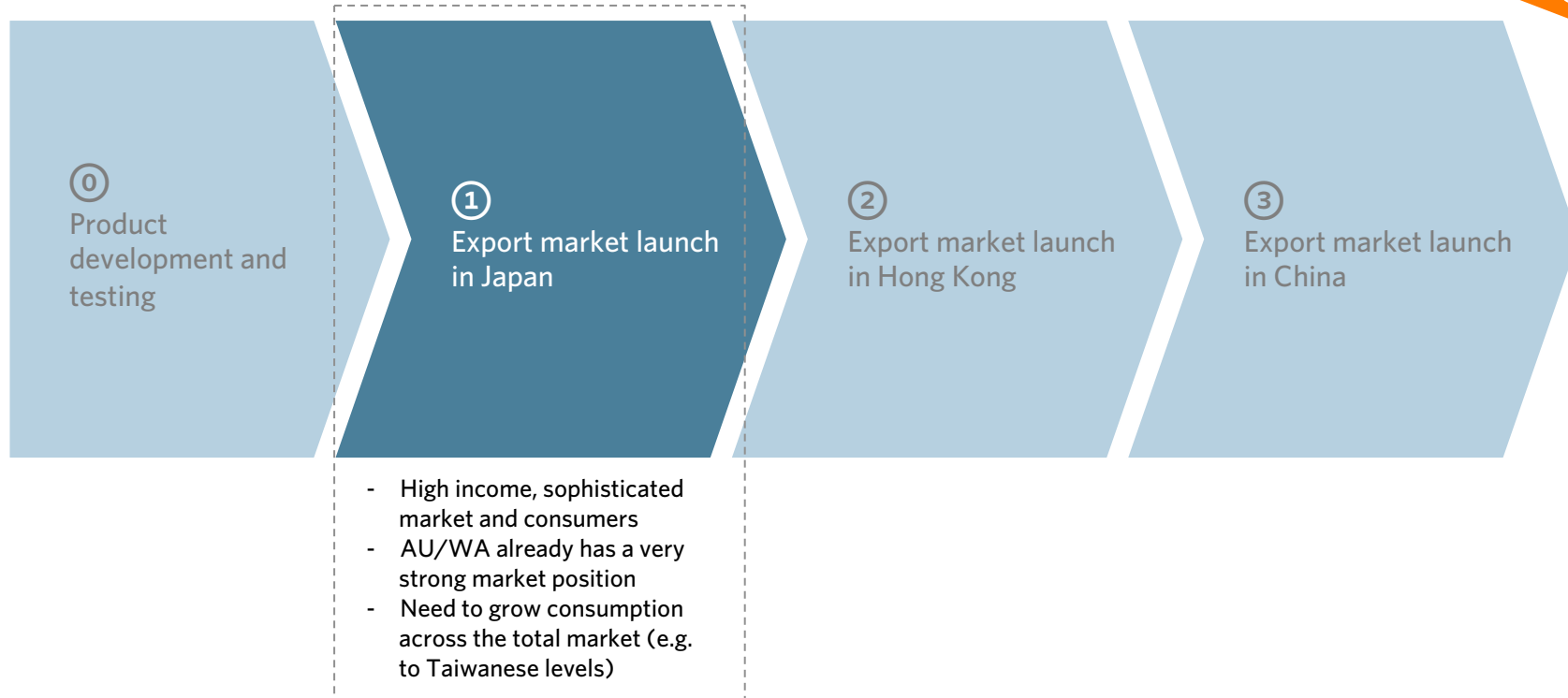
Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

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

PRELIMINARY "STRAW MAN" DEVELOPMENT & ROLLOUT PLAN FOR ROLLED OATS 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 is well-positioned to grow rolled oats exports to Asia

IS THE MARKET DEVELOPED & COMPETITIVE?

- The flow of rolled oats from the farm through to the consumer is relatively straight forward and simple
- Rolled oats prices are competitive in Asia, with a premium for imported products
- Asian markets have a much less developed rolled oats range and offer than Western countries
- “Leading indicator” Western markets strongly suggest depth of rolled oats range in Asian markets will increase going forward
- (Almost) all Western markets have extended range through flavoured and single serving offerings; Asian markets remain focused on traditional bulk pack rolled oats

WHAT IS WA CAPABLE OF DELIVERING?

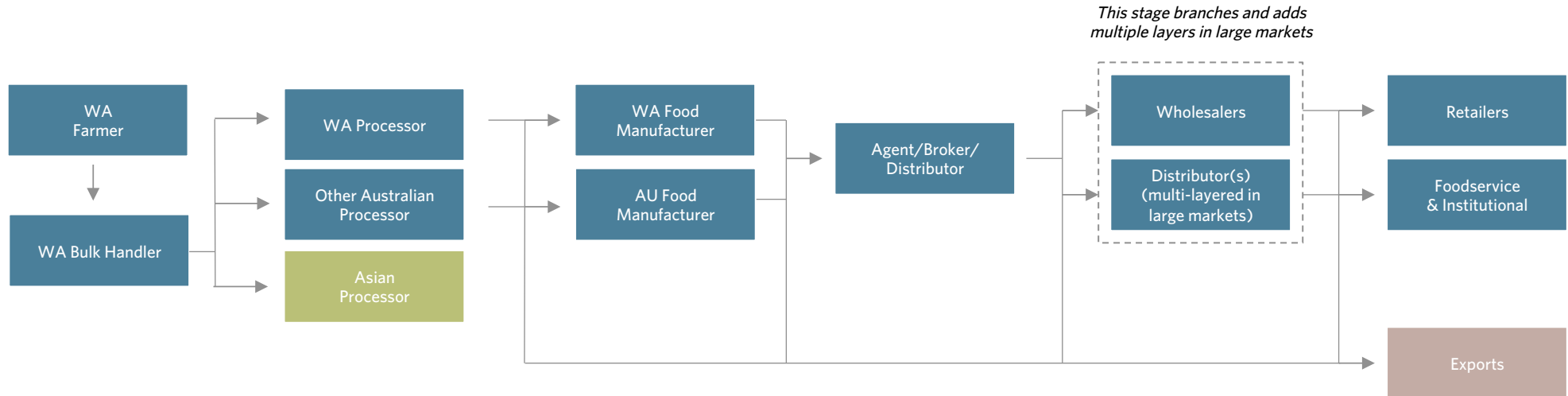
- A wide range of premium, value-adding product attributes emerged from our cross-country retailer survey
- Western Australian rolled oats producers need to continue to move forward and improve through new products
- Multiple potential positions exist to develop a premium rolled oats offer for Asia
-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

HOW IS THE MARKET STRUCTURED?

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

SIMPLIFIED MODEL OF SUPPLY CHAIN: ROLLED OATS

Model; 2016



WHO IS THE COMPETITION? PRICING

Rolled oats prices are competitive in Asia, with a premium for imported products

SHELF PRICE PER KG ACROSS SELECT SE ASIAN MARKETS AND AUSTRALIA: SELECT ROLLED OATS PRODUCTS

US\$/kg; Feb 2016



Source: Coriolis from store checks

WHAT IS ON THE SHELF? RANGE IN MARKET

Asian markets have a much less developed rolled oats range and offer than Western countries

EXAMPLE: ACTUAL RETAIL PACKED ROLLED OATS RANGE ON SHELF

Presence; actual; Feb 2016



London: GDP/Capita US\$75,200



Singapore: GDP/Capita US\$83,100

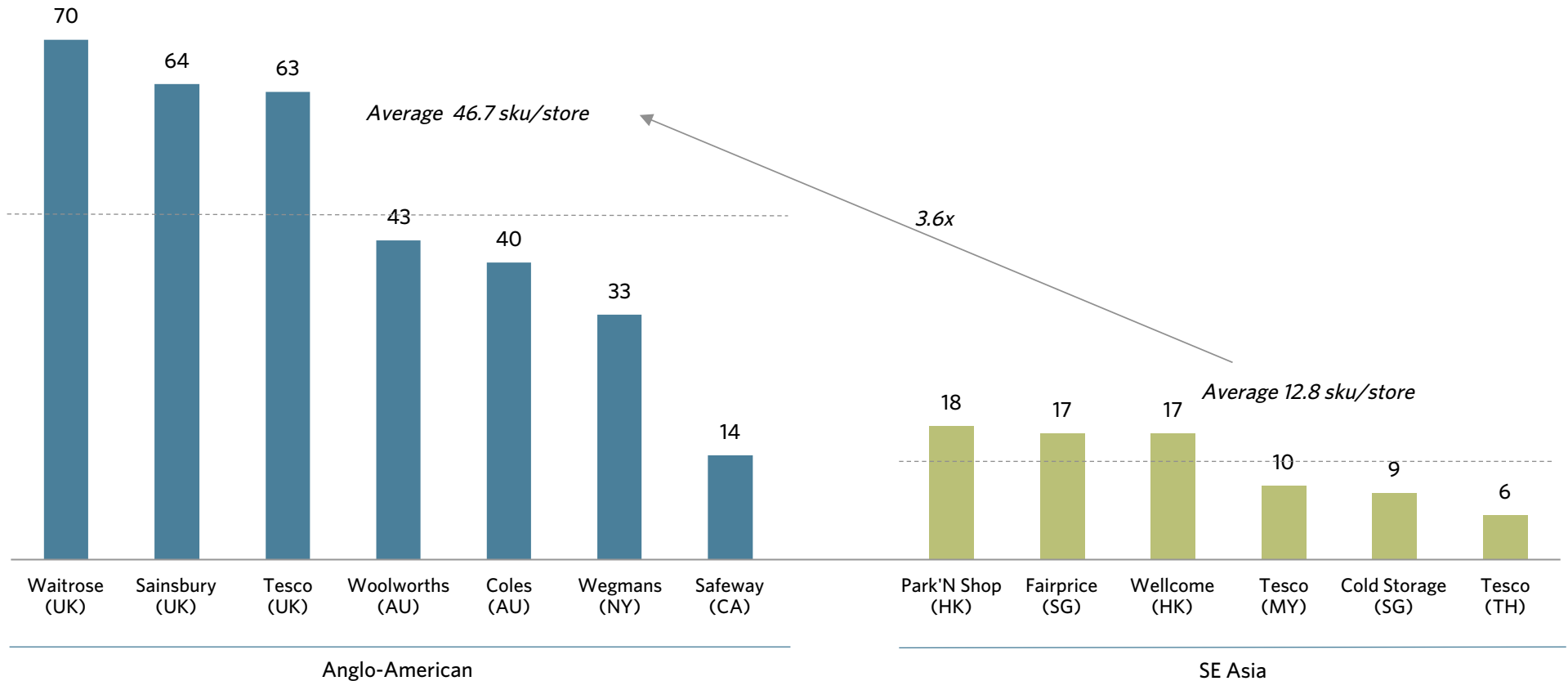


IS THE MARKET DEVELOPED & COMPETITIVE? RANGE

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

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

SKU; actual; Feb 2016

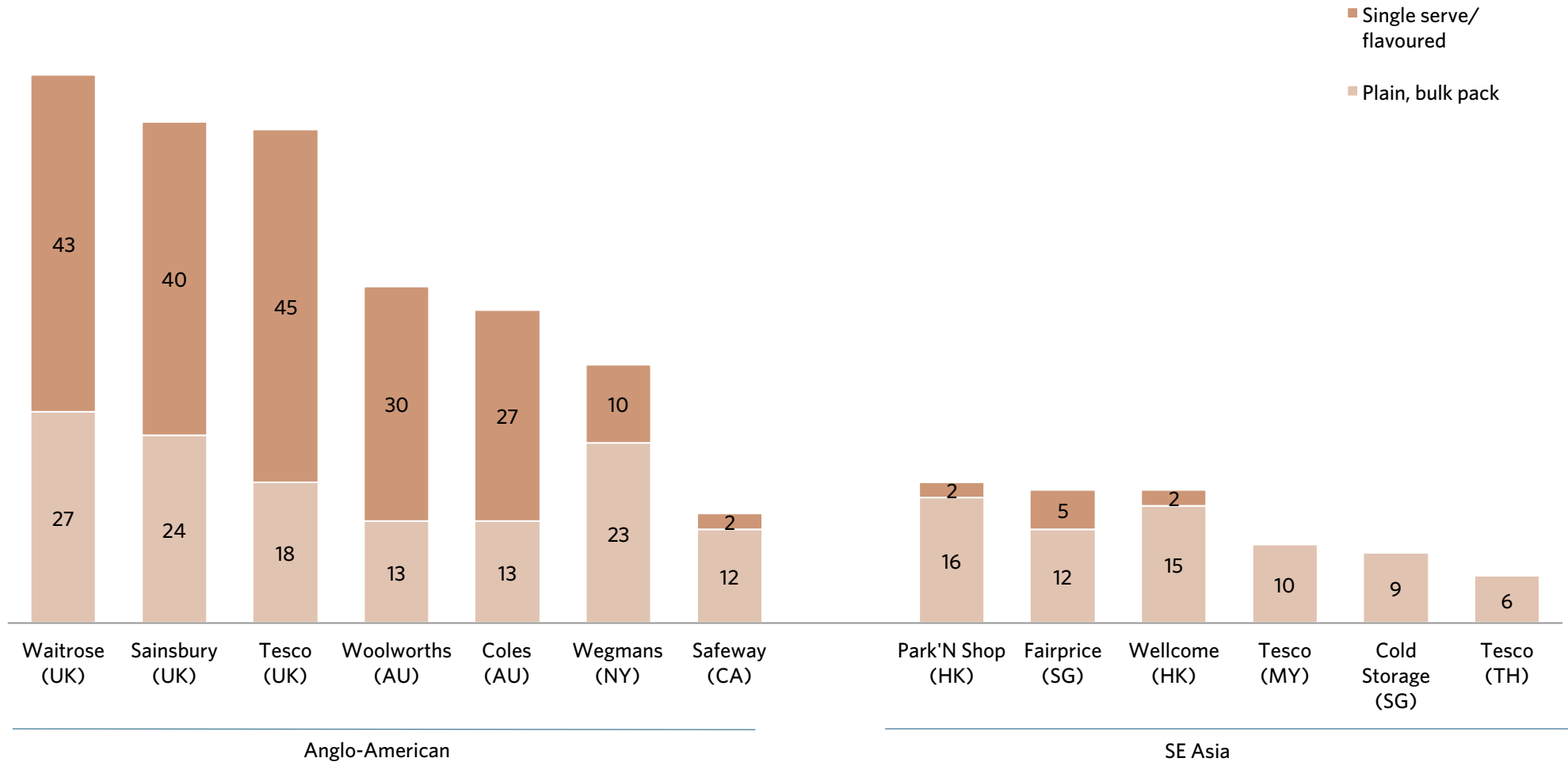


IS THE MARKET DEVELOPED & COMPETITIVE? SEGMENTATION

(Almost) all Western markets have extended range through flavoured and sachet serving offerings; Asian markets remain focused on traditional rolled oats

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

SKU; actual; Feb 2016

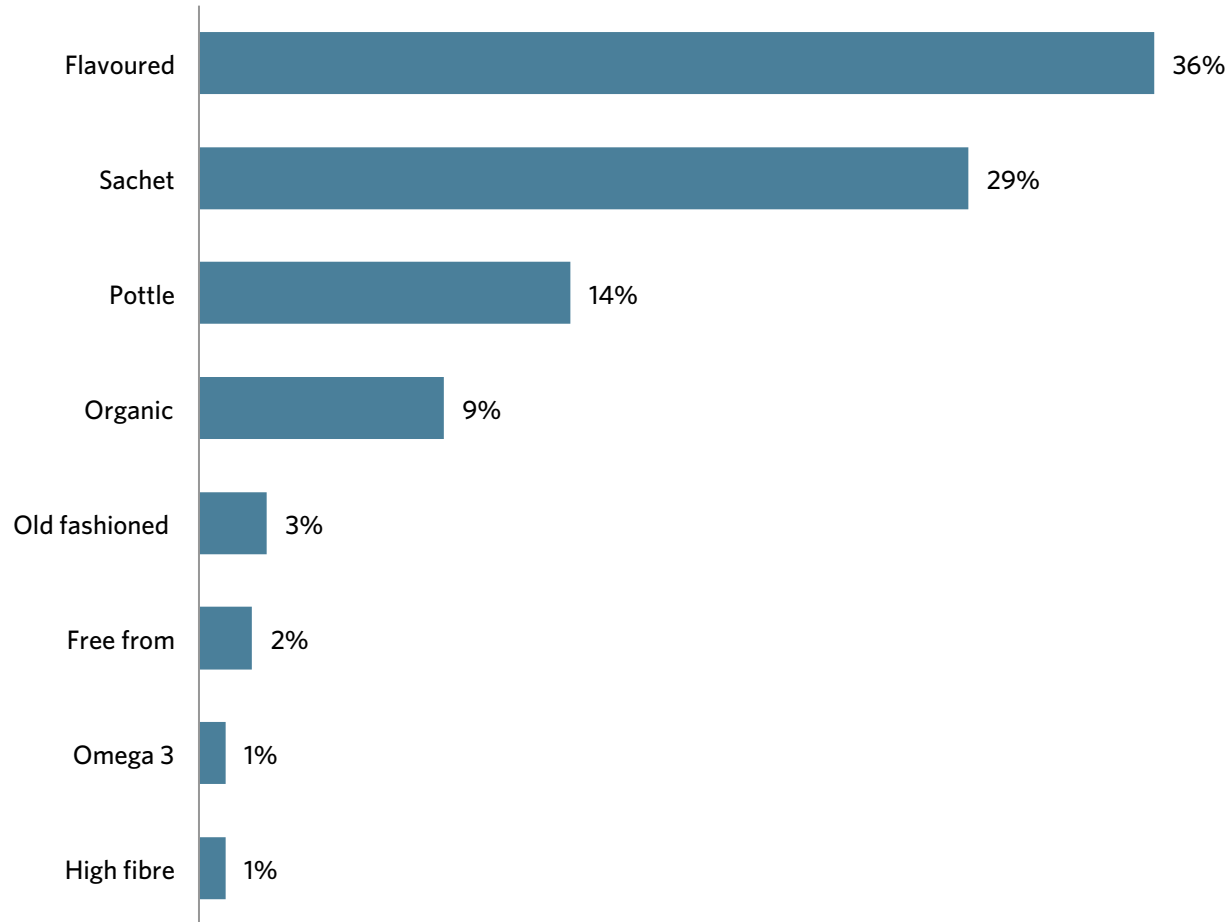


IS THE MARKET DEVELOPED & COMPETITIVE? PRODUCT ATTRIBUTES

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=404; Feb 2016



TAKEAWAYS

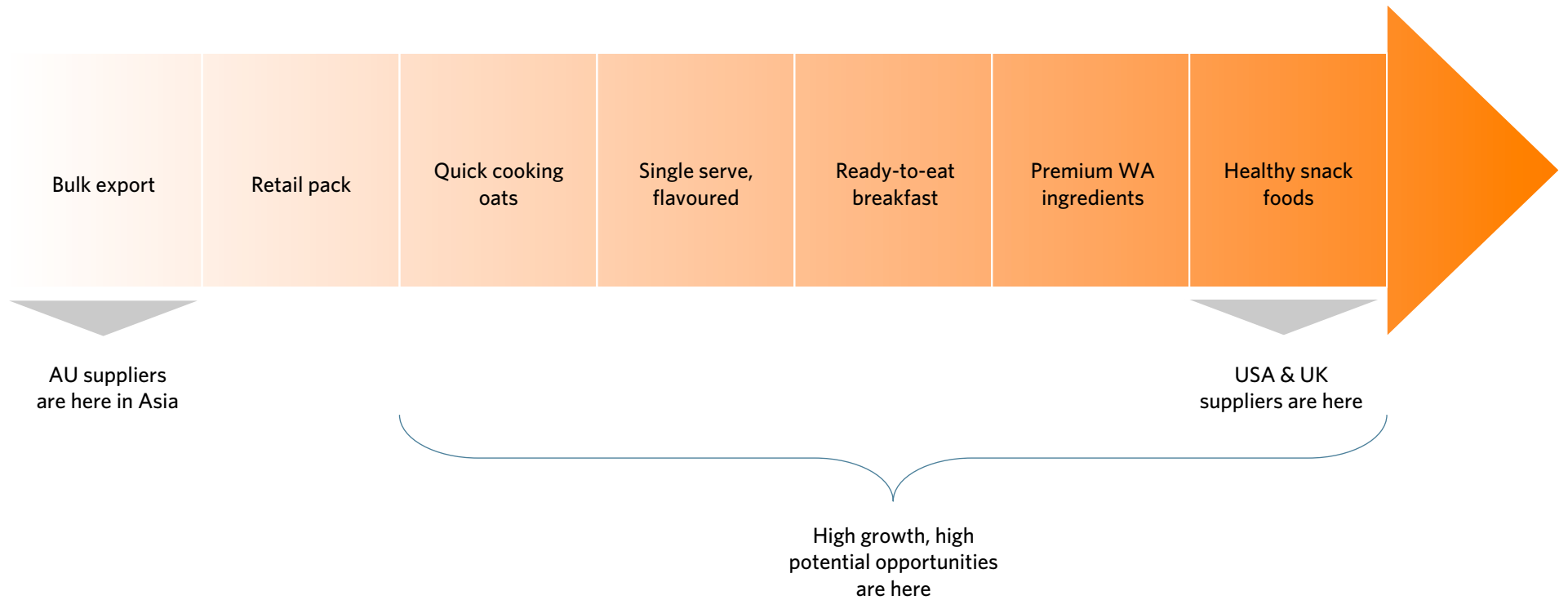
- This provides very clear instruction on what product attributes are succeeding the most across markets
- Western Australian rolled oats manufacturers looking to grow value and share should focus in these areas
- Flavoured oat products stand out, with over 1/3 observed product SKU being flavoured
- Survey universe is all products in all listed retailers (across multiple countries)

WHAT IS WA CAPABLE OF DELIVERING? STRATEGIC DIRECTION

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

SUGGESTED STRATEGIC DIRECTION: WESTERN AUSTRALIAN ROLLED OATS

Model; 2016



WHAT IS WA CAPABLE OF DELIVERING? CLAIMS

Multiple potential positions exist to develop a premium rolled oats offer for Asia

IDENTIFIED POTENTIAL PREMIUM POSITIONS

Model; 2016



Lowers cholesterol levels

High source of beta-glucan

Gluten-free

Unique antioxidants

Vitamins and minerals

Reduce risk of CVD

Enhance immune system

Low GI

Reduce risk of diabetes

Organic

Western Australia

Specialty variety

Track & trace

Sustainably grown

Farmer backstory

Premium ingredients

Distinctive WA flavours

Traditional methods

Instant cooking

Resealable packaging

Ready-to-eat

Lunchbox snacks

On-the-go breakfast

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 rolled oats offer

EXAMPLES OF PREMIUM PRODUCTS FROM OTHER MARKETS

Select; 2016



Juicy oats

Breakfast solved

Soaked, not cooked

Ready-to-eat

Oats soaked in apple juice

Greek yoghurt

Real cut fruit



Oat-powered fruit smoothies

It was Mother Nature's idea

No sugar added

Packed with power

2 bowls of oatmeal

No preservatives

100% juice

Nothing artificial

Made in the USA



Organic

Old fashioned

Whole grain

To your good health

Perfect for breakfast

You can see our quality

High in protein & fibre

No cholesterol

Uniquely "Kiln Toasted"



Oats & Honey

Crunchy granola bars

Organic

Just 7 wholesome ingredients

Non- GMO

Since 1872

WHAT IS A POTENTIAL WA OFFER?

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

HYPOTHETICAL EXAMPLE OF POTENTIAL PREMIUM PRODUCT FROM WA

Model; 2016



WHAT IS THE IDENTIFIED OPPORTUNITY?

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

THOUGHT STARTER
“STRAWMAN” MODEL
FOR DISCUSSION

PRELIMINARY “STRAW MAN” DEVELOPMENT & ROLLOUT PLAN FOR ROLLED OATS OPPORTUNITY *Model; 2016*

CURRENT AU POSITIONING IN ASIA



IDENTIFIED HIGH GROWTH, HIGH VALUE OPPORTUNITY FOR WA



POTENTIAL FUTURE PRODUCT LINE EXTENSION



Bulk shipment

From Australia

From Western Australia

Organic

Specialty variety

Premium ingredients

Farmer backstory

Jarrah honey

Ready-to-eat

WA flavours

Lowers cholesterol

High in fibre

Quick cooking

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?

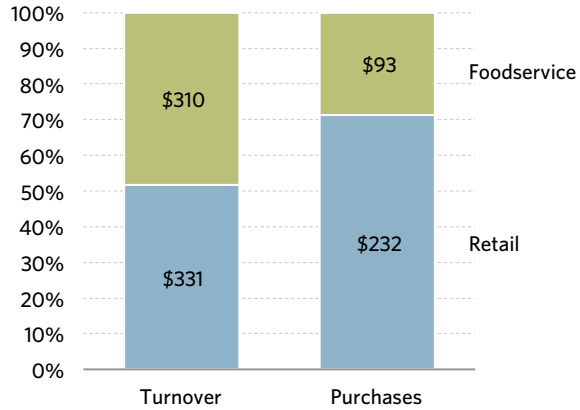


FOCUS MARKET - 1 - JAPAN

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

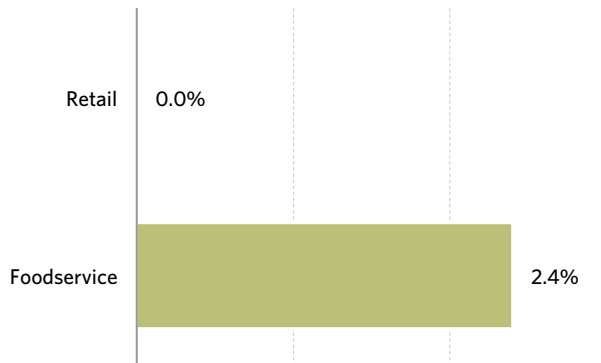
TURNOVER & PURCHASES

US\$b; 2014



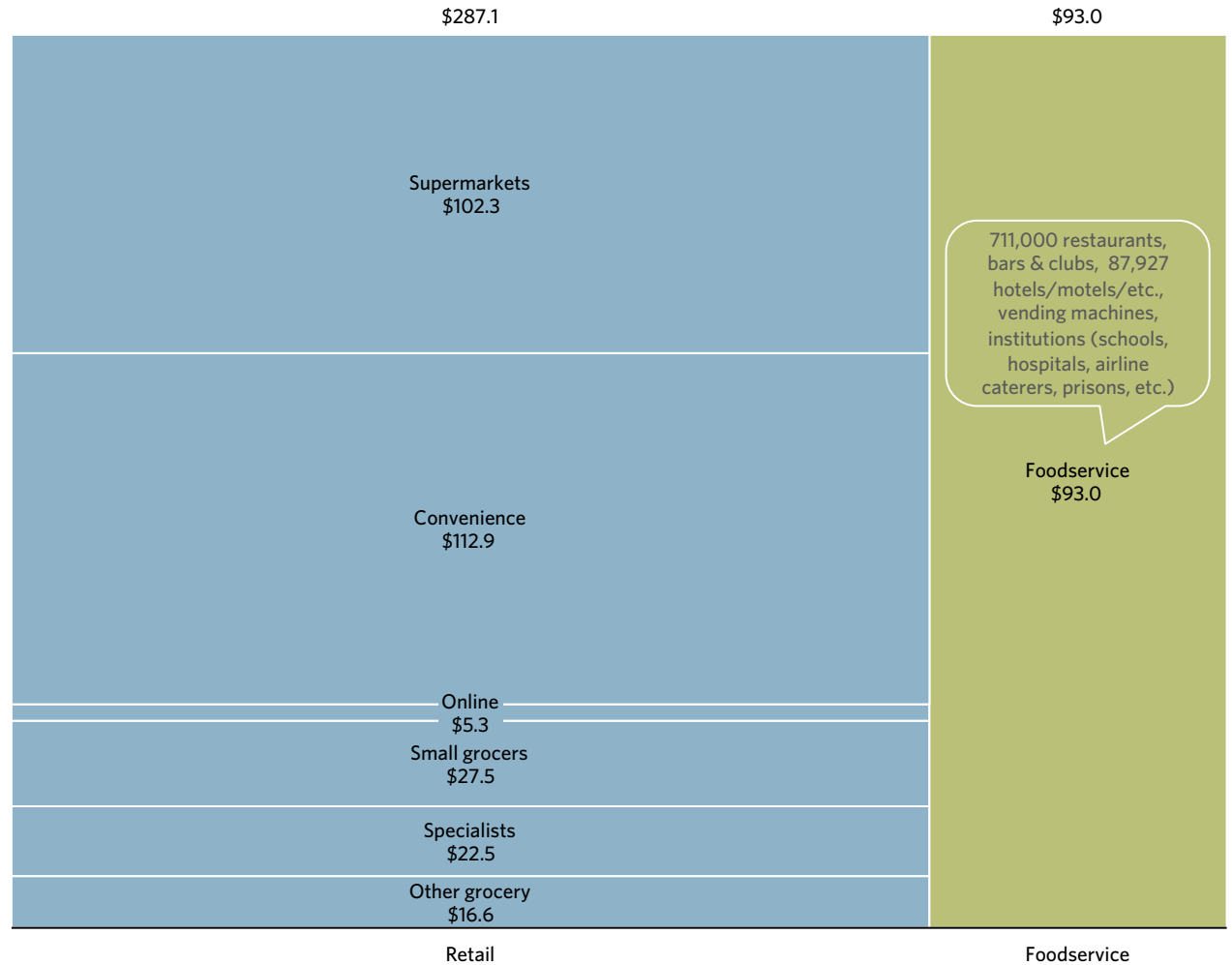
TURNOVER GROWTH RATE

% Y-O-Y; JPY; 2013v2014



ESTIMATED WHOLESALE FOOD & FMCG PURCHASES

US\$b; 2014



















FOCUS MARKET - 1 - JAPAN

Eight potential in-market partners are identified for Western Australian firms in Japan

POTENTIAL IN-MARKET PARTNERS - JAPAN

2015 or as available

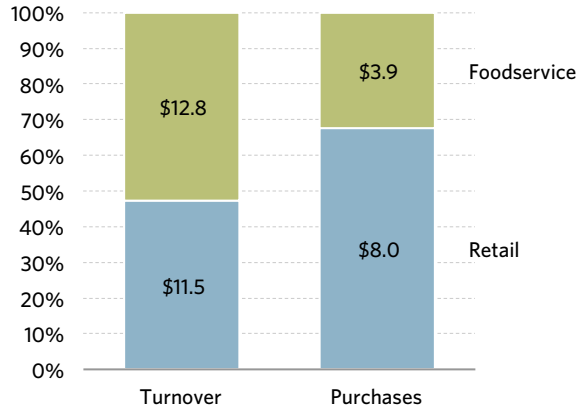
								
Firm	AEON Retail	Seven & I Holdings	Uny Group Holdings	Izumi Co. Ltd.	Life	Arcs	Lawson	Family Mart
Ownership	Japan; listed	Japan; listed	Japan; listed	Japan; listed	Japan; listed	Japan	Japan; listed	Japan; listed
Website	www.aeon.info www.maxvalu.co.jp www.daiei.co.jp www.ministop.co.jp	www.7andi.com www.sej.co.jp www.itoyokado.co.jp	www.unygroup-hds.com www.uny.co.jp www.circleksunkus.jp	www.izumi.co.jp	www.lifecorp.jp	www.arcs-g.co.jp	www.lawson.jp	www.family.co.jp
Annual sales Total/Food	US\$61.2b US\$16.8b	US\$49.1b US\$17.5b	US\$9.0b US\$6.7b	US\$4.7b US\$2.1b	US\$4.7b US\$3.8b	US\$4b US\$4b	US\$17.4b	US\$14b
Food store formats	Hypermarket Supermarket Department stores Convenience (3.4% share) Pharmacy/HBC	Convenience 17,900 (41% share) Supermarkets 185 Department stores	Supermarket Convenience (9.6% share) HBC Foodservice	Supermarkets Hypermarkets Malls		Supermarket	Convenience 12,254 (20.5% share)	Convenience 9,975 (19% share)
# of stores	1,882	18,262	226	102	239	290	12,254	9,975 (JP) 16,970 (Global)
Store fascia								

FOCUS MARKET - 2 - HONG KONG

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

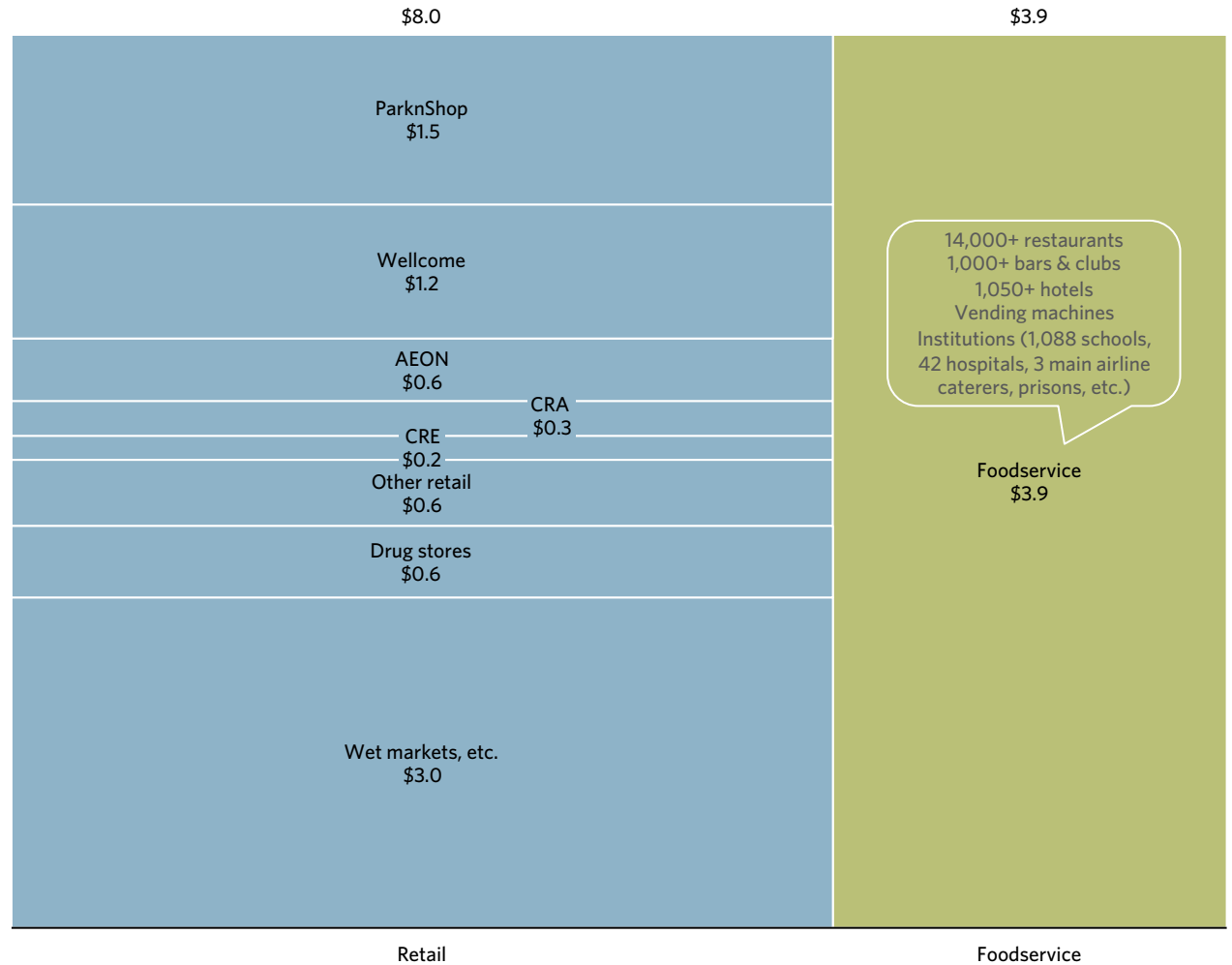
TURNOVER & PURCHASES

US\$b; 2014



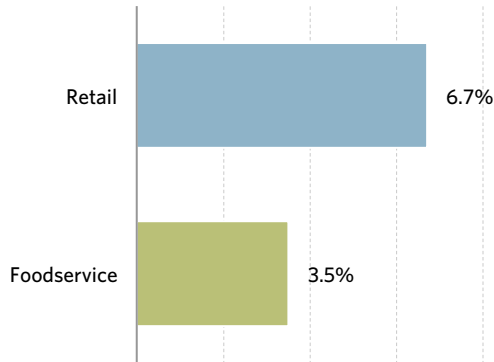
ESTIMATED WHOLESALE FOOD & FMCG PURCHASES

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

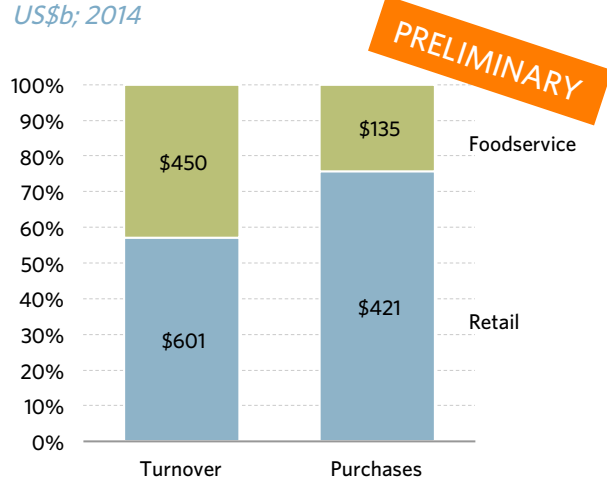
2015 or as available

							
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	 		 	 			 

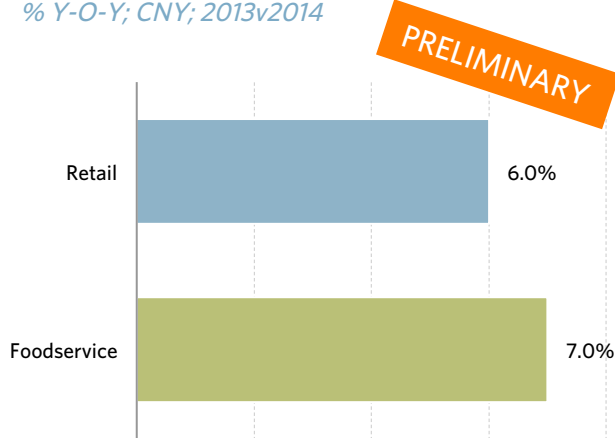
FOCUS MARKET - 3 - CHINA

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

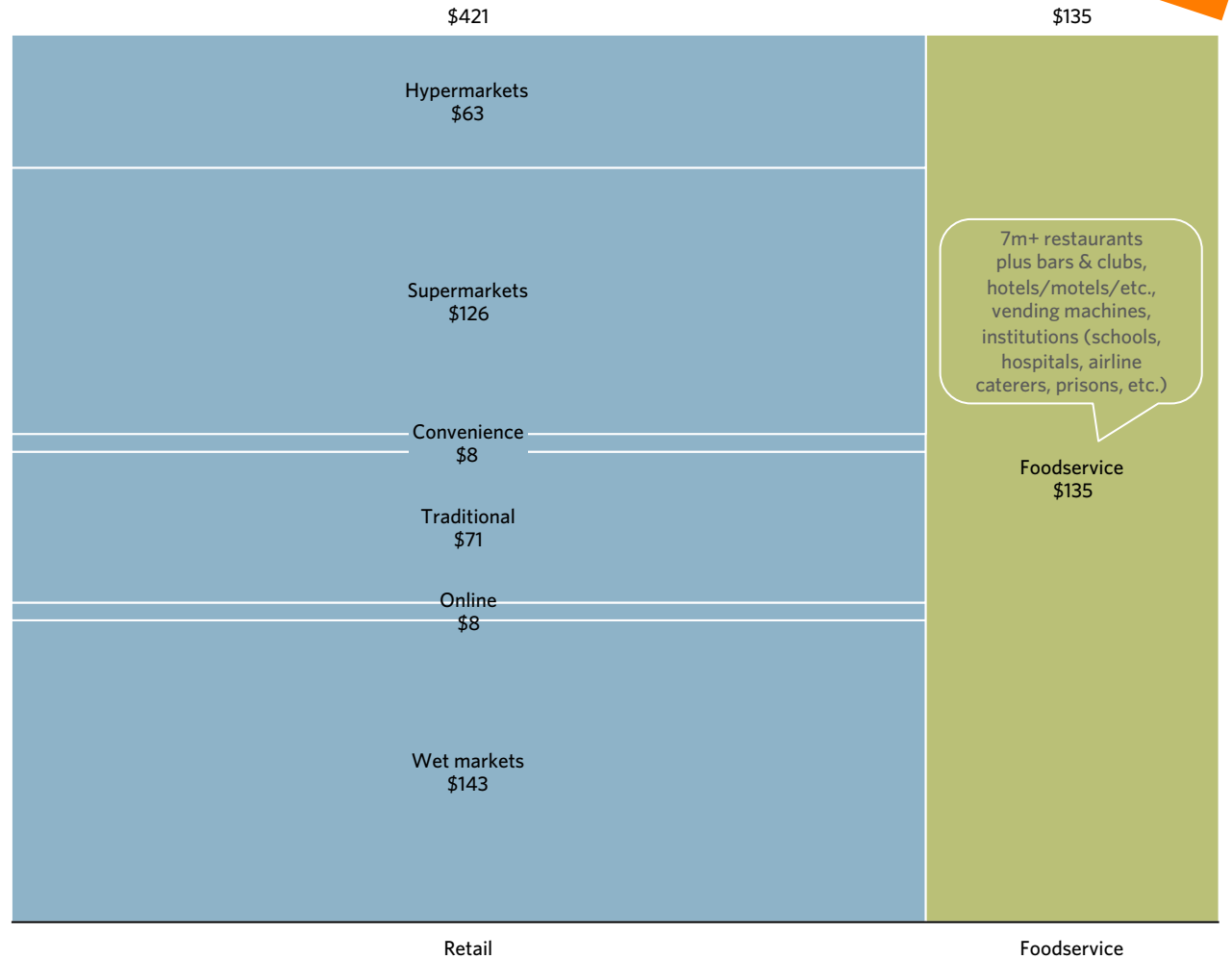
TURNOVER & PURCHASES
US\$b; 2014



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

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

ANCHOR FOODS		CBH GROUP		PREMIUM GRAIN HANDLERS	
ADDRESS: 148 Carrington Street, O'Connor, WA 6163		ADDRESS: 30 Delhi St, West Perth, WA 6005		ADDRESS: 12 - 14 Sultan Way, N Fremantle, WA 6959	
PHONE: 08 93144200		PHONE: 08 9237 9600		PHONE: 08 9430 6656	
WEBSITE: www.anchorfoods.com.au		WEBSITE: www.cbh.com.au		WEBSITE: www.pgh.com.au	

QUAKER OATS AUSTRALIA		UNIGRAIN	
ADDRESS: 12 Carolyn Way, Forrestfield, WA 6058		ADDRESS: 28 Howson Way, Bibra Lake, WA 6163	
PHONE: 08 9454 8166		PHONE: 08 9418 6126	
WEBSITE: www.quakeroats.com.au		WEBSITE: www.unigrain.com.au	

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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.

