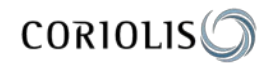




TARGET MARKET OPPORTUNITIES IN ASIA FOR SAUSAGES

Part of Asia Market Success, April 2016



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FINAL v100; April 2016

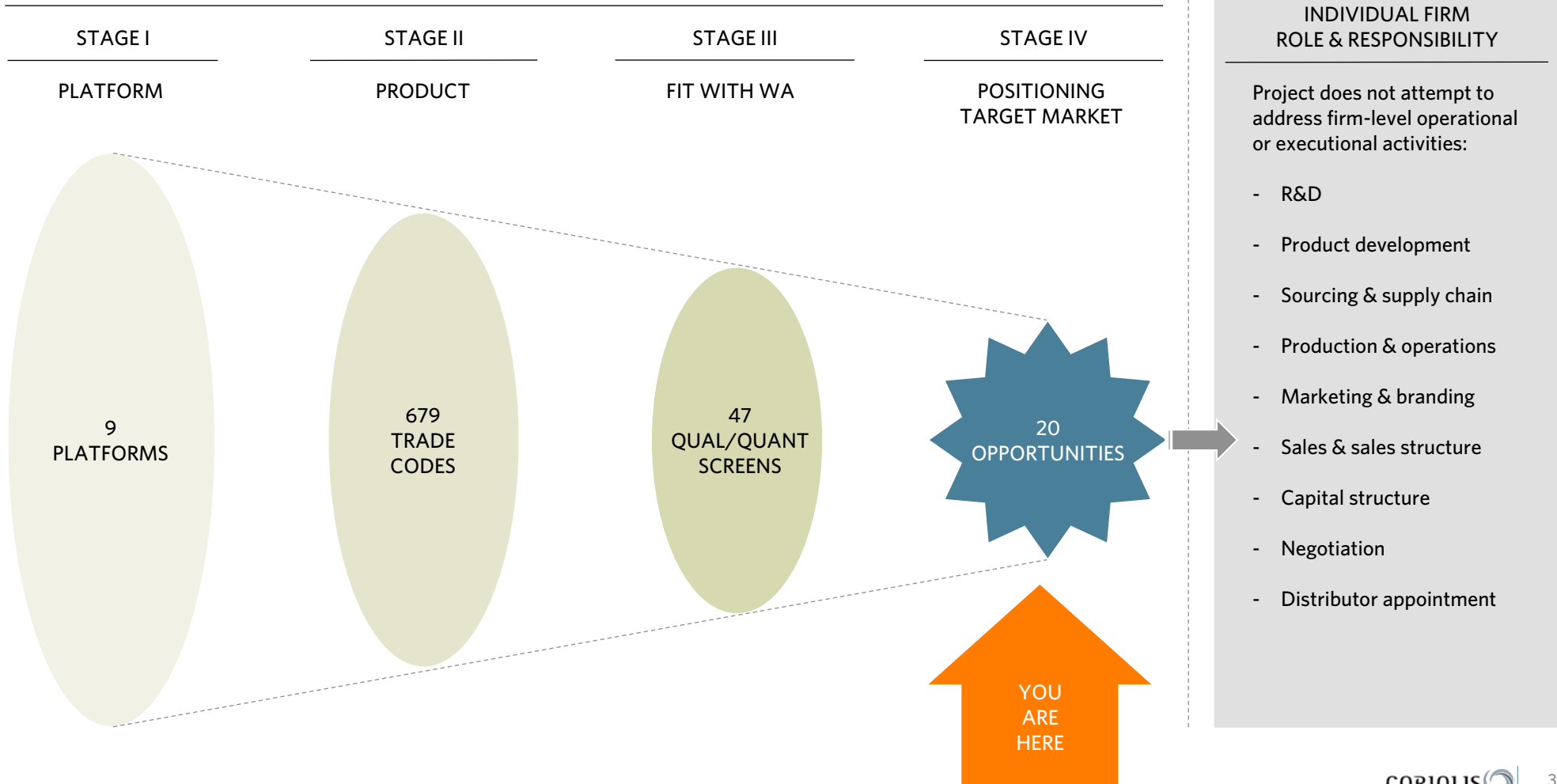
SCREENING OVERVIEW

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

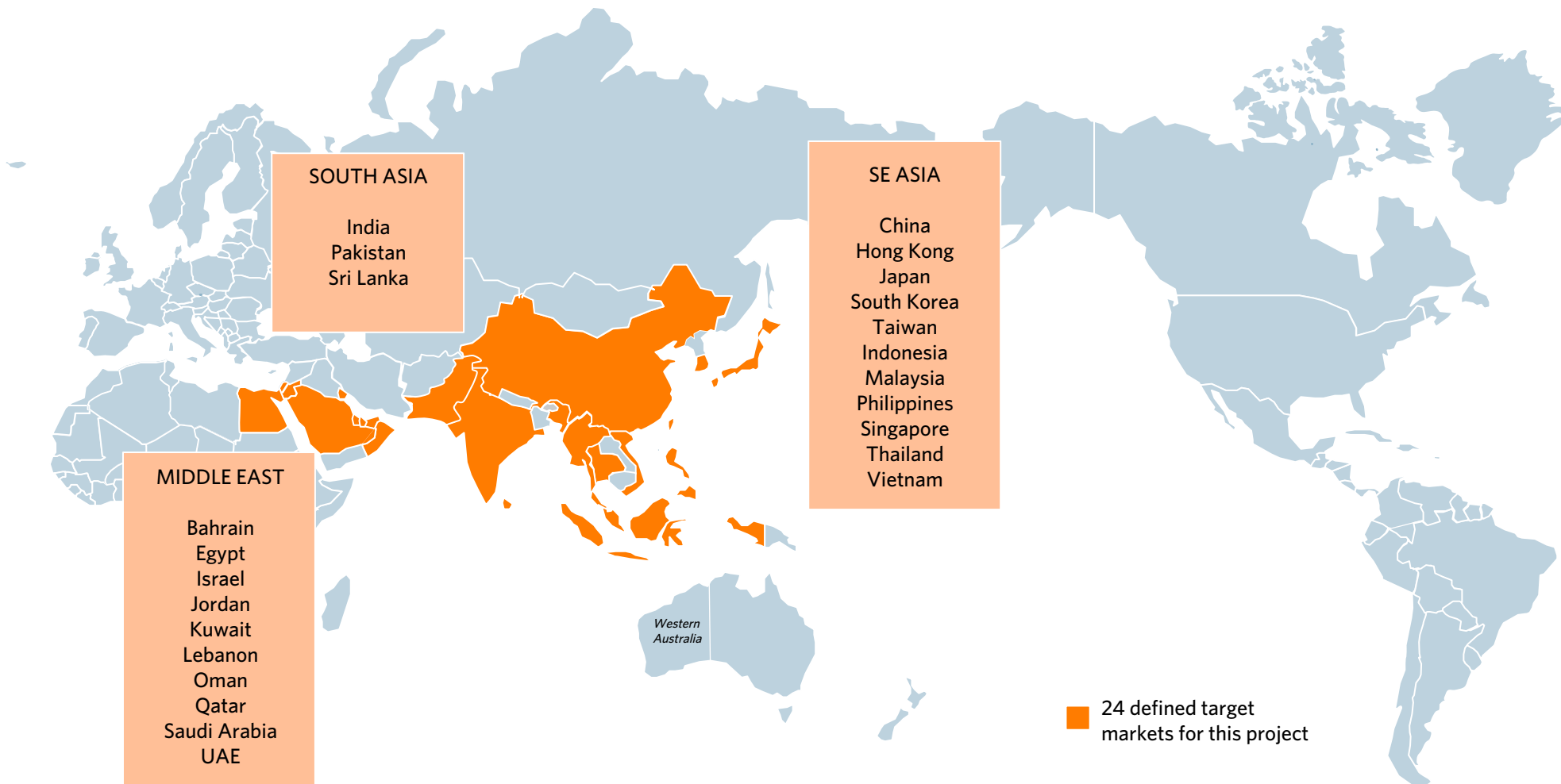
WA INDUSTRY-GOOD RESEARCH



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?

Sausages emerged in Phase I as one of twenty “high growth, high potential” opportunities for Western Australia; sausages are processed meat products that are typically served cooked

PRODUCT OVERVIEW

Example; 2015

PRODUCT PROFILE	
HS Code	160100
Product	Sausages
Out-of-scope	Fresh cuts of meat, mince, salted, brined, dried or smoked meat, homogenised preparations, liver products, ham and processed ham, blood products etc. as all are covered under other screened trade codes
Origin	Ancient Europe; mentioned by Homer and well established in Roman times
Example ingredients	Pork (76%), Water, Potato Starch, Sea Salt, Mineral Salt (451), Dextrose (Tapioca, Maize), Preservative (223), Dehydrated Vegetables (Onion, Garlic), Herb & Spices, Flavours, Mustard Flour, Natural Colouring (Fermented Red Rice), Canola Oil, Fruit Oil, Antioxidant (306).
Forms/usage	<ul style="list-style-type: none">- Market stall/convenience store snack- Hot dogs- Ingredient in western cuisines
Drivers of consumer/market success	<ul style="list-style-type: none">- Global trend towards snacking- Emerging middle class eating more meat- Increasing Westernisation of diet- Less expensive means of increasing meat consumption

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 sausage exports to Asia

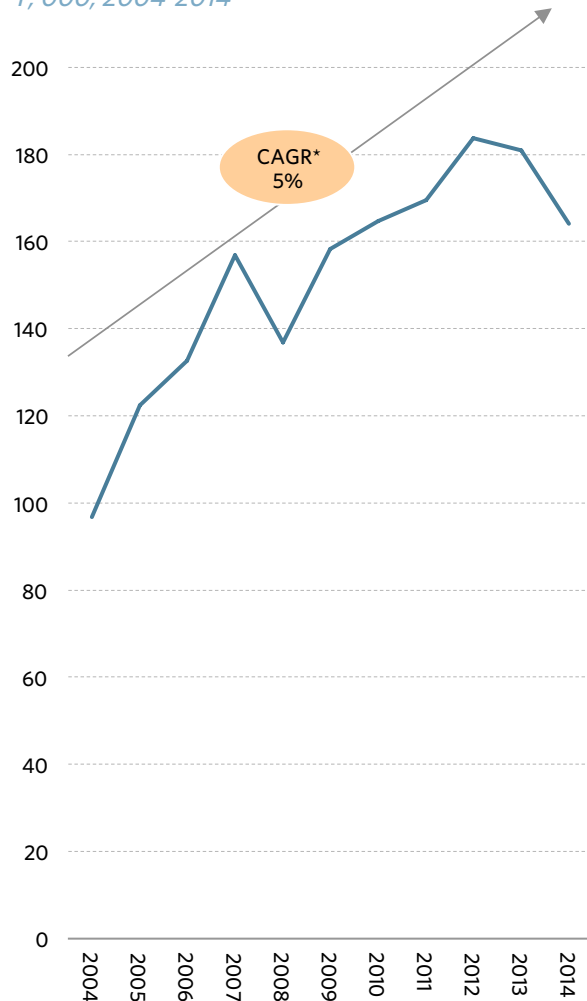
- Asian sausage imports are increasing, with import value growth being driven by rising tonnage and increasing average FOB (free-on-board) prices
- Asian & Middle Eastern sausage imports come from both Western countries (USA & Europe) and Asia (primarily China & Thailand)
 - China & the USA stand out for driving sausage trade value growth in Asia & the Middle East
 - China leads in absolute volume growth over the last five years, while Thailand, Jordan and other Middle Eastern suppliers stand out for rate of growth; USA retrenching
 - Average FOB price to target Asian markets vary significantly by supplier with Italy leading, followed by Australia, Thailand and China; Brazil is the low cost price fighter
- While sausages go to a number of the target markets, Japan and Hong Kong stand out
 - Growth in sausage imports has been driven by East Asia
 - China, South Korea and Saudi Arabia standing out for market growth
 - Average sausage import prices vary by region, with East Asia generally paying more; Japan and Hong Kong both stand out as a large markets that pay well
 - Imported sausage consumption and aggregate imports appear partially driven by income per capita; Middle East stands out as higher in general
- Market share varies by country; the USA is strong in East Asia; European countries stronger across the Middle East; China really only present at any level in Hong Kong and Japan
- Western Australia has opportunities for sausage export growth in select Asian markets
- Data supports new high value, premium sausage opportunities being initially launched in (1) Hong Kong, (2) Japan and (3) Singapore
- As a “Straw Man” for discussion, we identify an export market roll-out plan

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

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

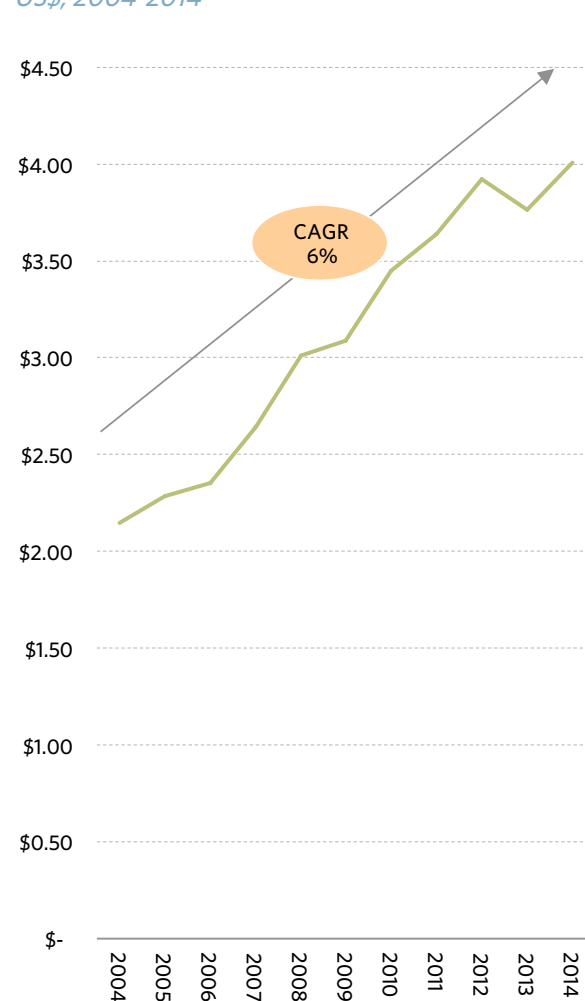
VOLUME

T; 000; 2004-2014



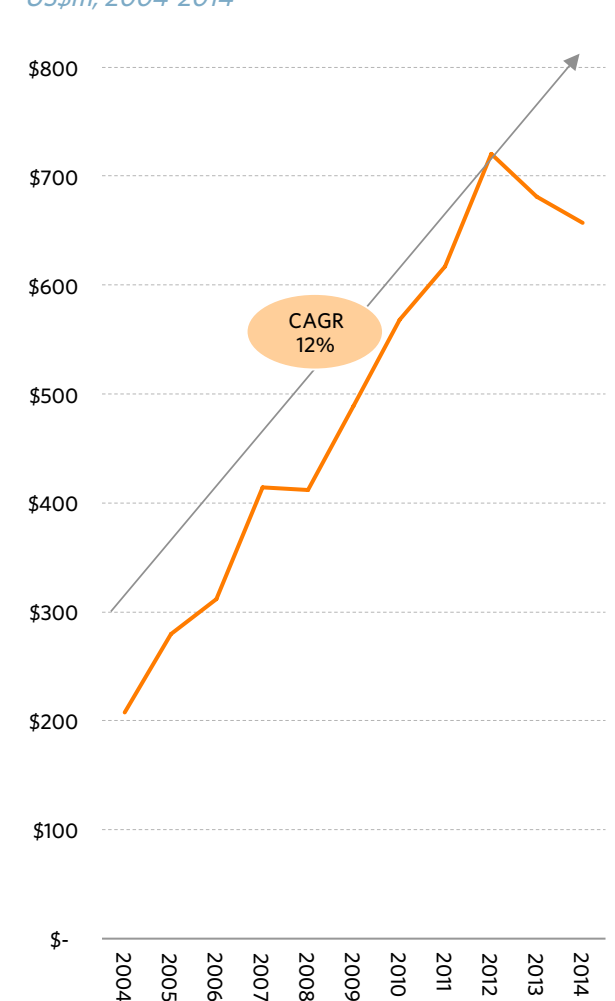
AVERAGE PRICE PER KILOGRAM

US\$; 2004-2014



VALUE

US\$m; 2004-2014

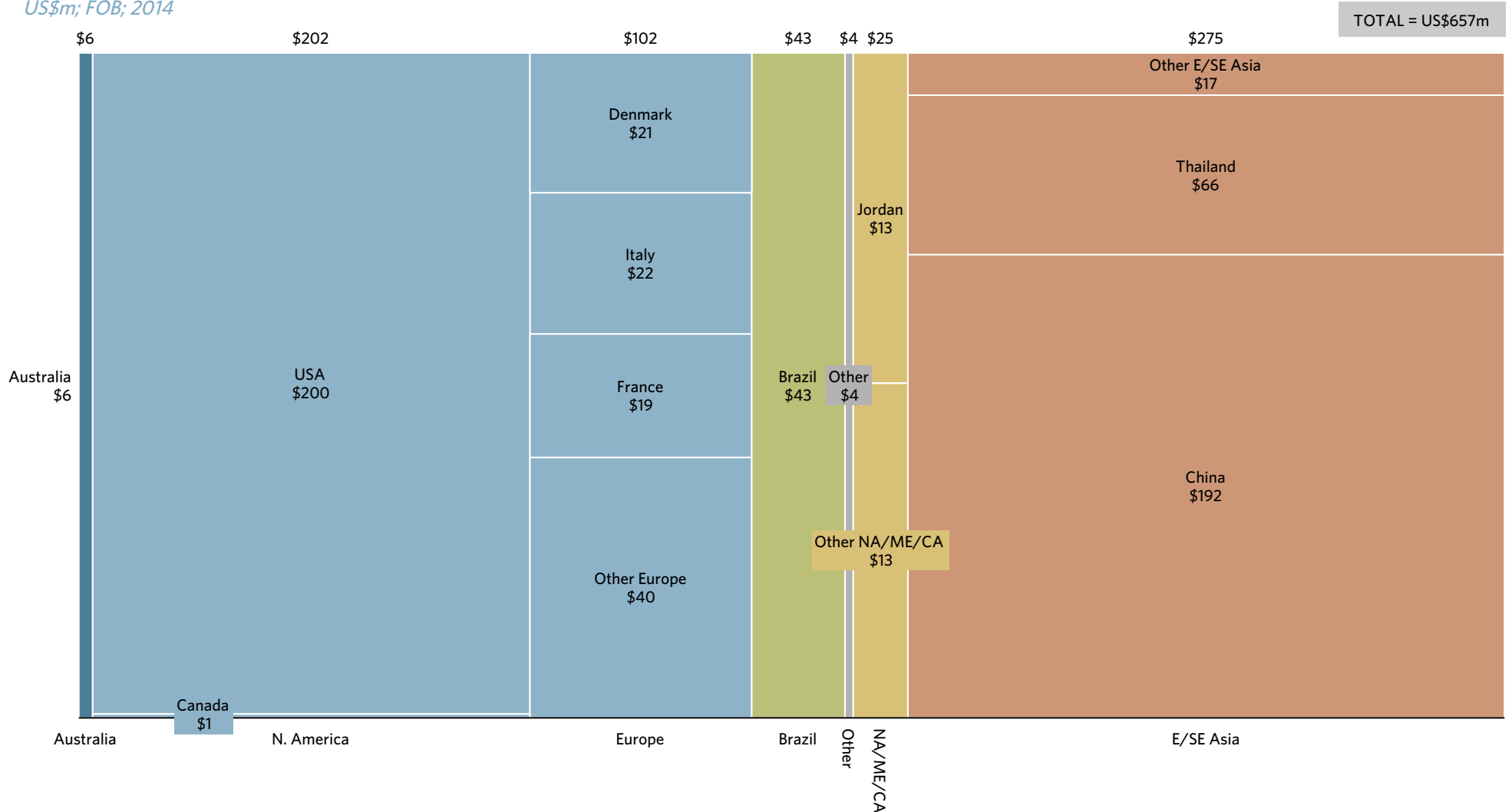


* Compound Annual Growth Rate; Source: UN Comtrade database; Coriolis analysis and classifications

Asian & Middle Eastern sausage imports come from both Western countries (USA & Europe) and Asia (primarily China & Thailand)

EXPORT VALUE BY SUPPLIER TO TARGET REGION

US\$m; FOB; 2014

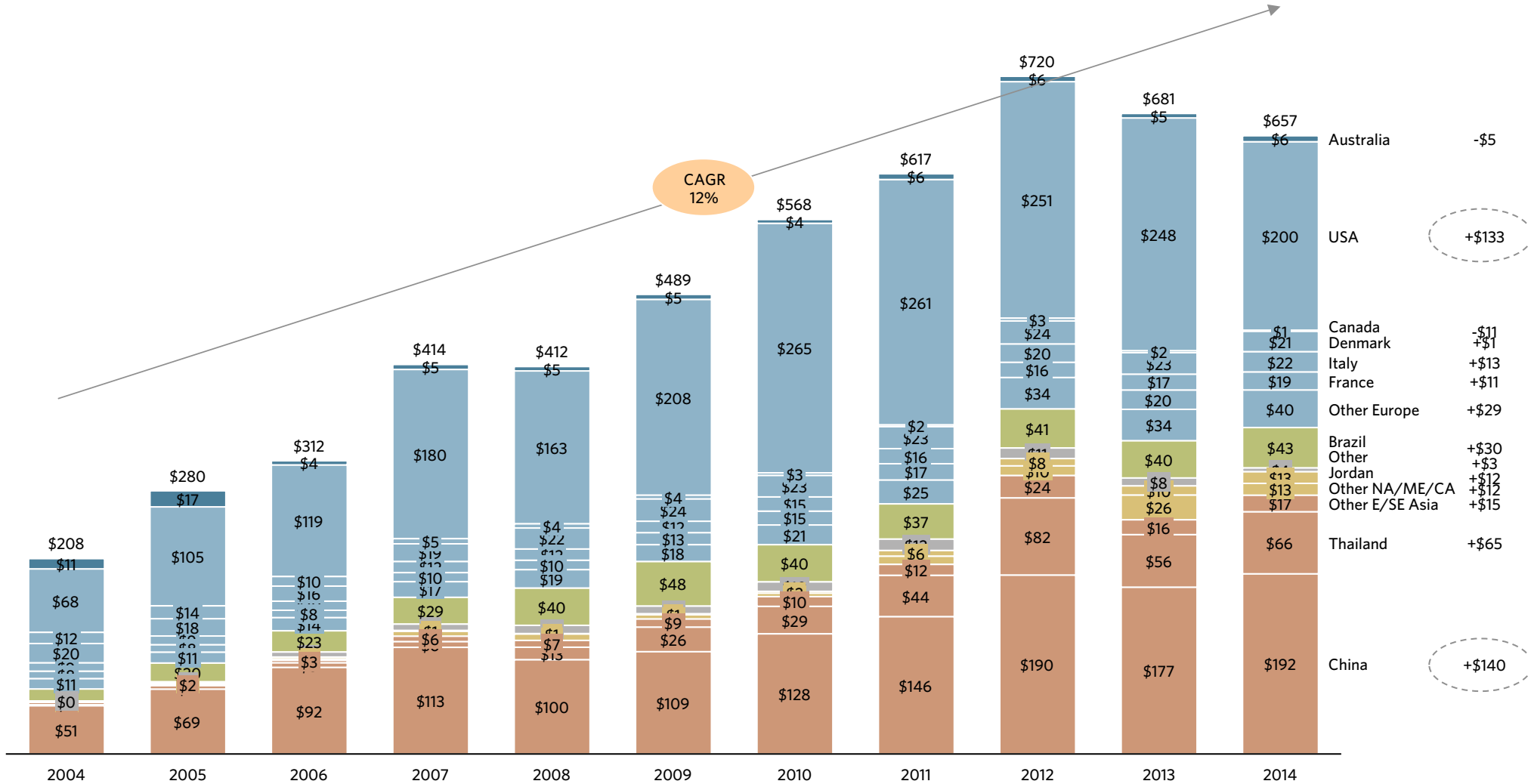


China & the USA stand out for driving sausage trade value growth in Asia & the Middle East

10y ABS

EXPORT VALUE BY SUPPLIER TO TARGET REGION

US\$m; FOB; 2004-2014

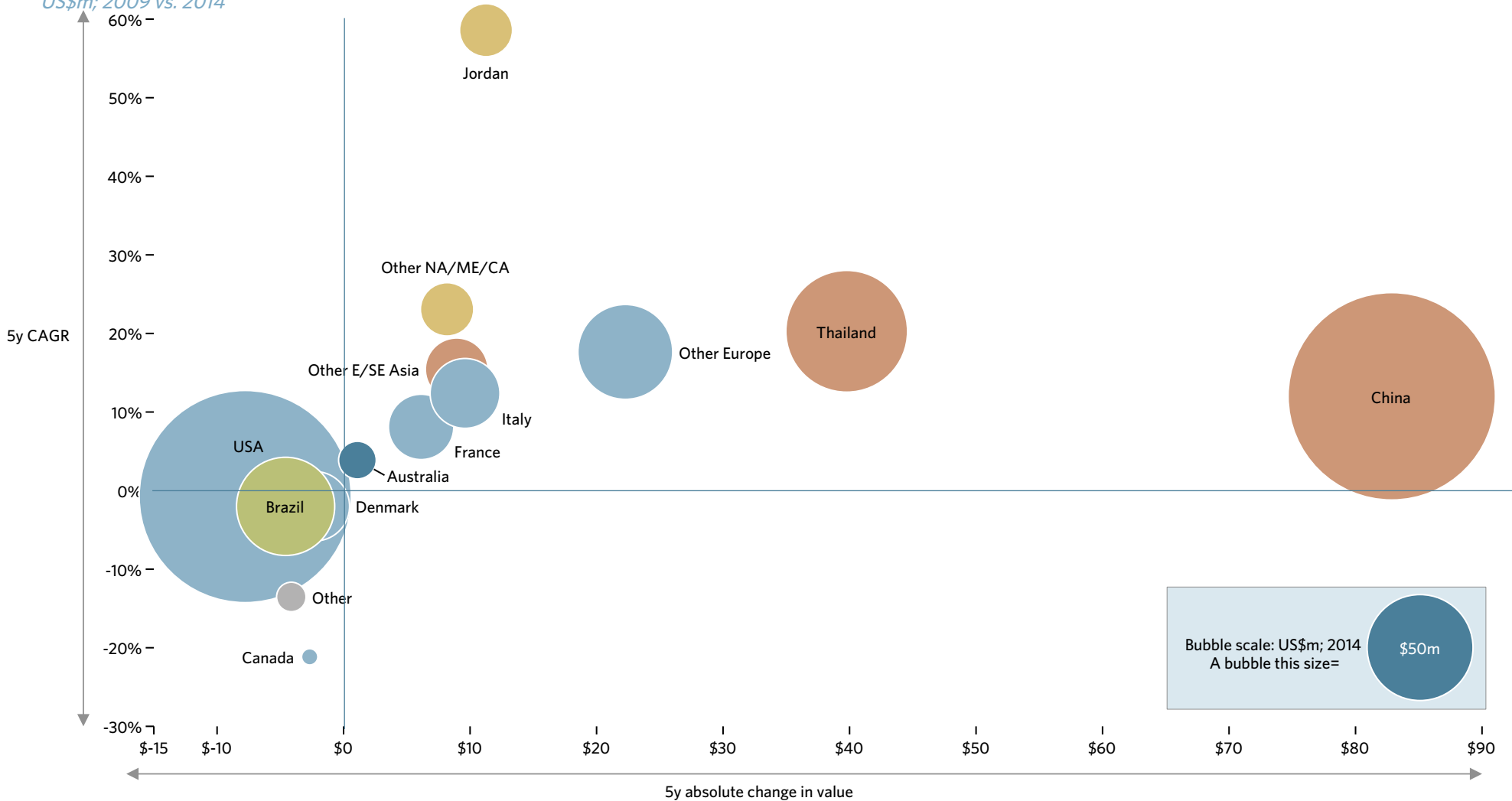


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

China leads in absolute volume growth over the last five years, while Thailand, Jordan and other Middle Eastern suppliers stand out for rate of growth; USA retrenching

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

US\$m; 2009 vs. 2014

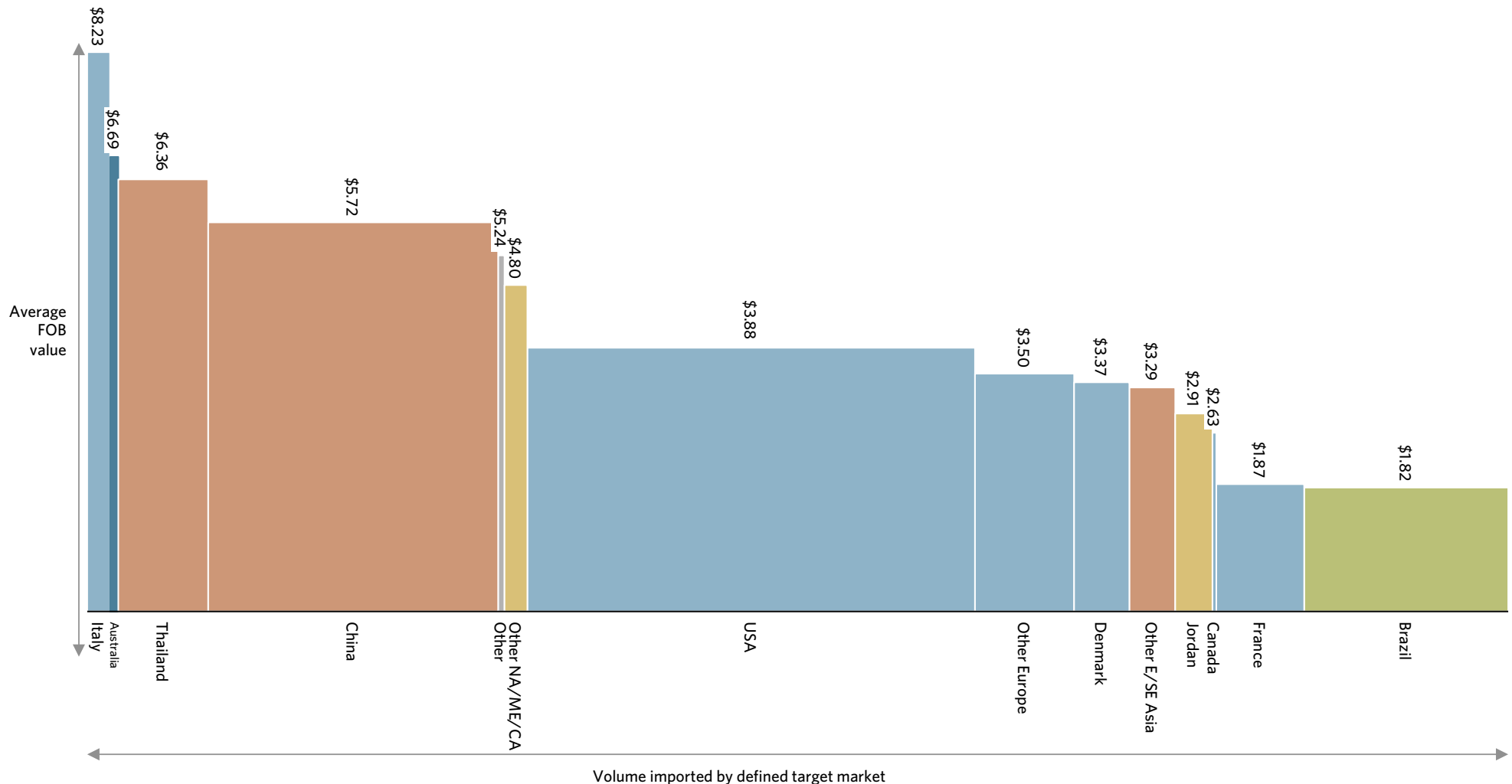


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Average FOB price to target Asian markets vary significantly by supplier with Italy leading, followed by Australia, Thailand and China; Brazil is the low cost price fighter

AVERAGE EXPORT VALUE COST CURVE BY SUPPLIER

US\$/kg; t; FOB; 2014



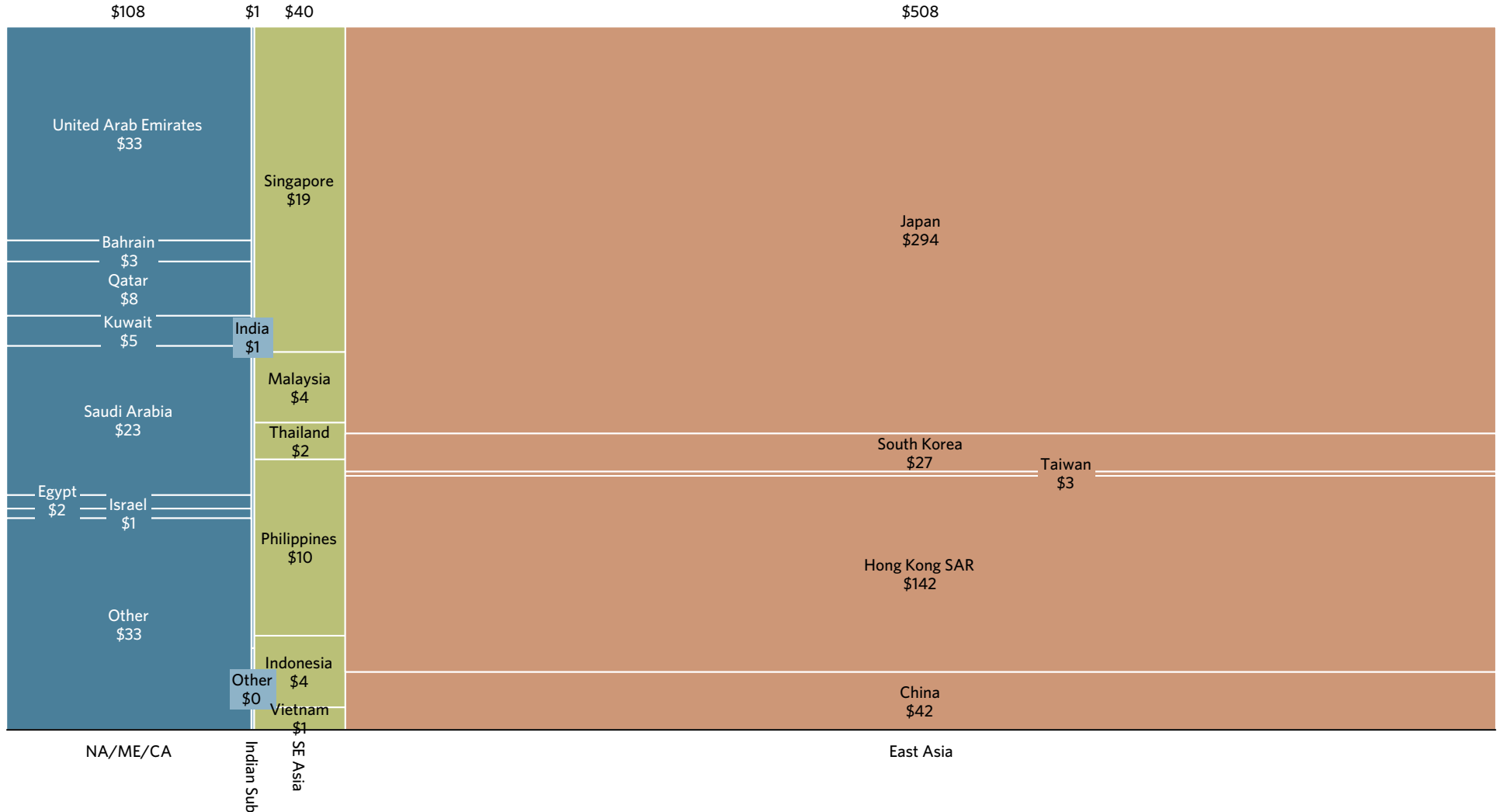
Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

While sausages go to a number of the target markets, Japan and Hong Kong stand out

IMPORT VALUE BY MARKET BY REGION

US\$m; FOB; 2014

TOTAL = US\$657m

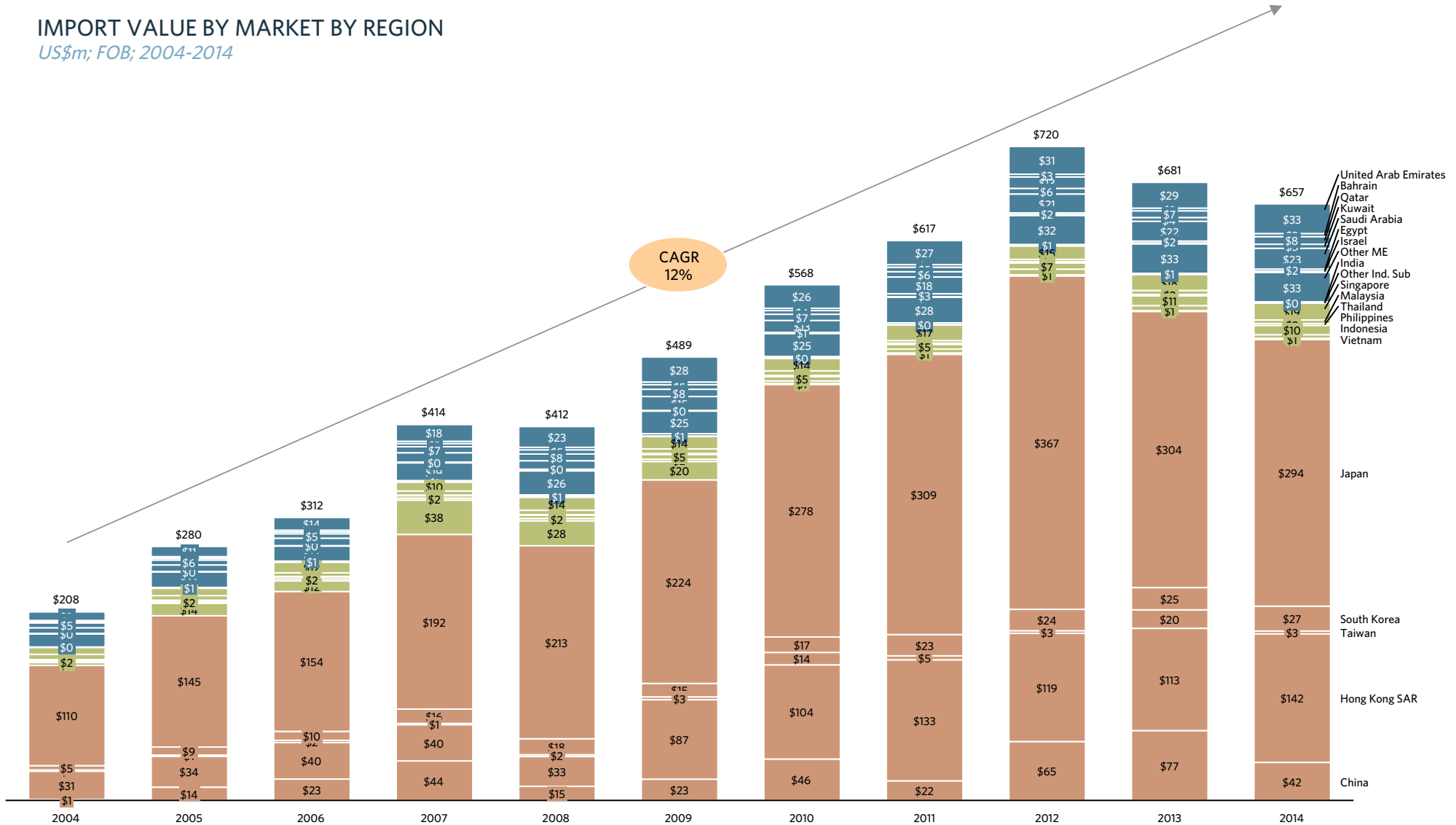


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Growth in sausage imports has been driven by East Asia

IMPORT VALUE BY MARKET BY REGION

US\$m; FOB; 2004-2014

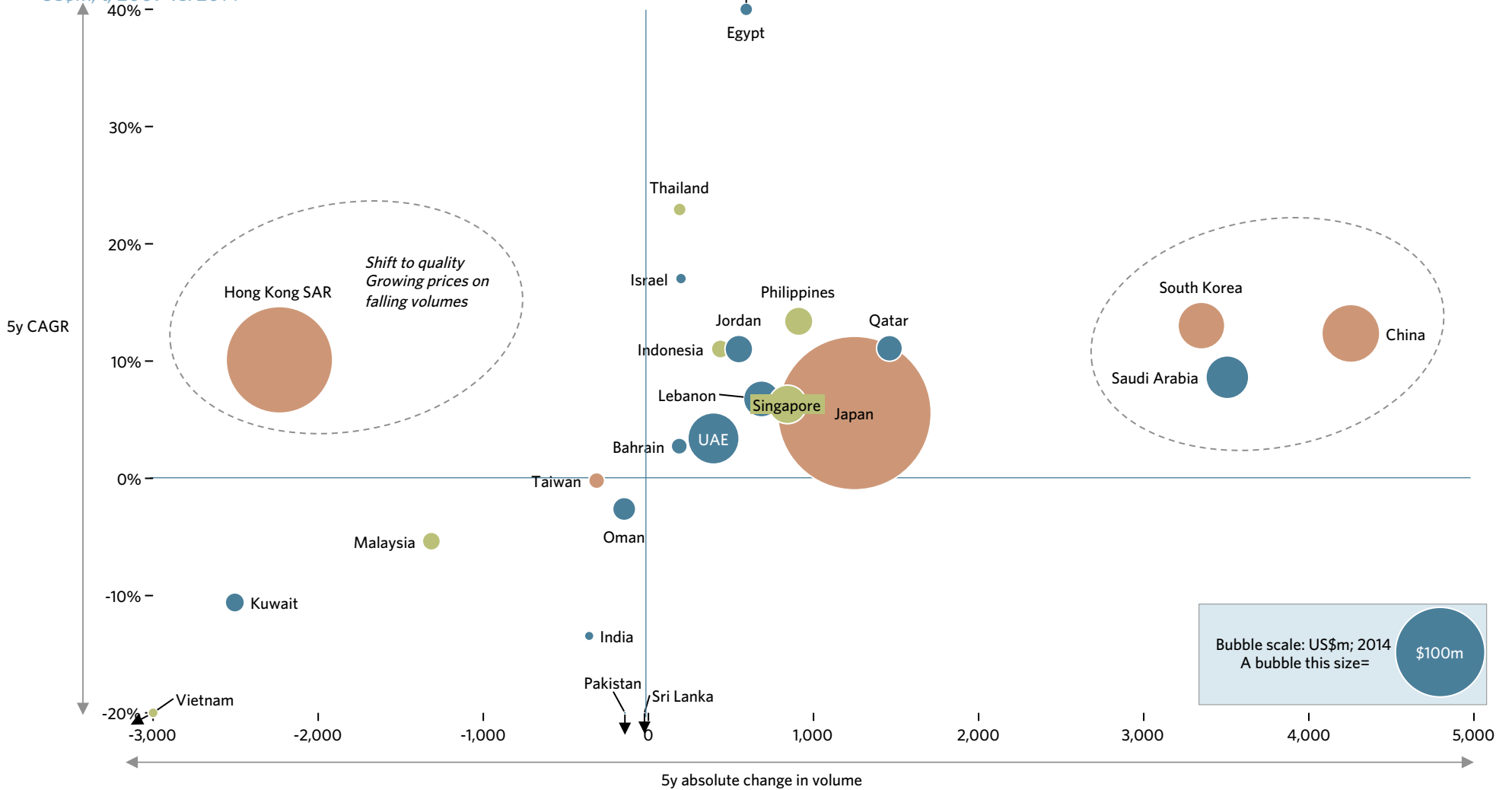


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

China, South Korea and Saudi Arabia standing out for market growth

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

US\$m; t; 2009 vs. 2014

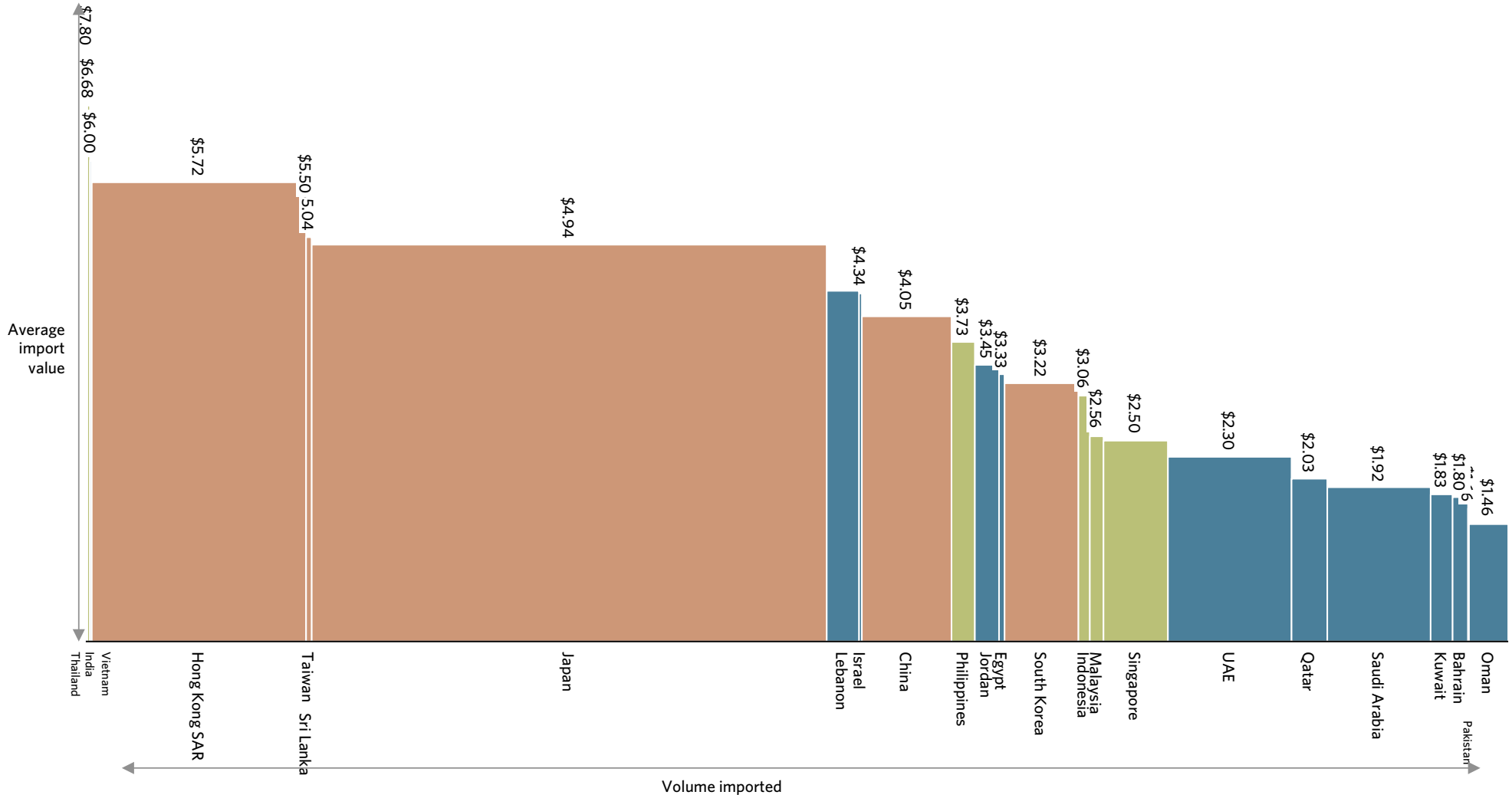


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Average sausage import prices vary by region, with East Asia generally paying more; Japan and Hong Kong both stand out as a large markets that pay well

AVERAGE IMPORT VALUE COST CURVE BY MARKET/REGION

US\$/kg; t; FOB; 2014

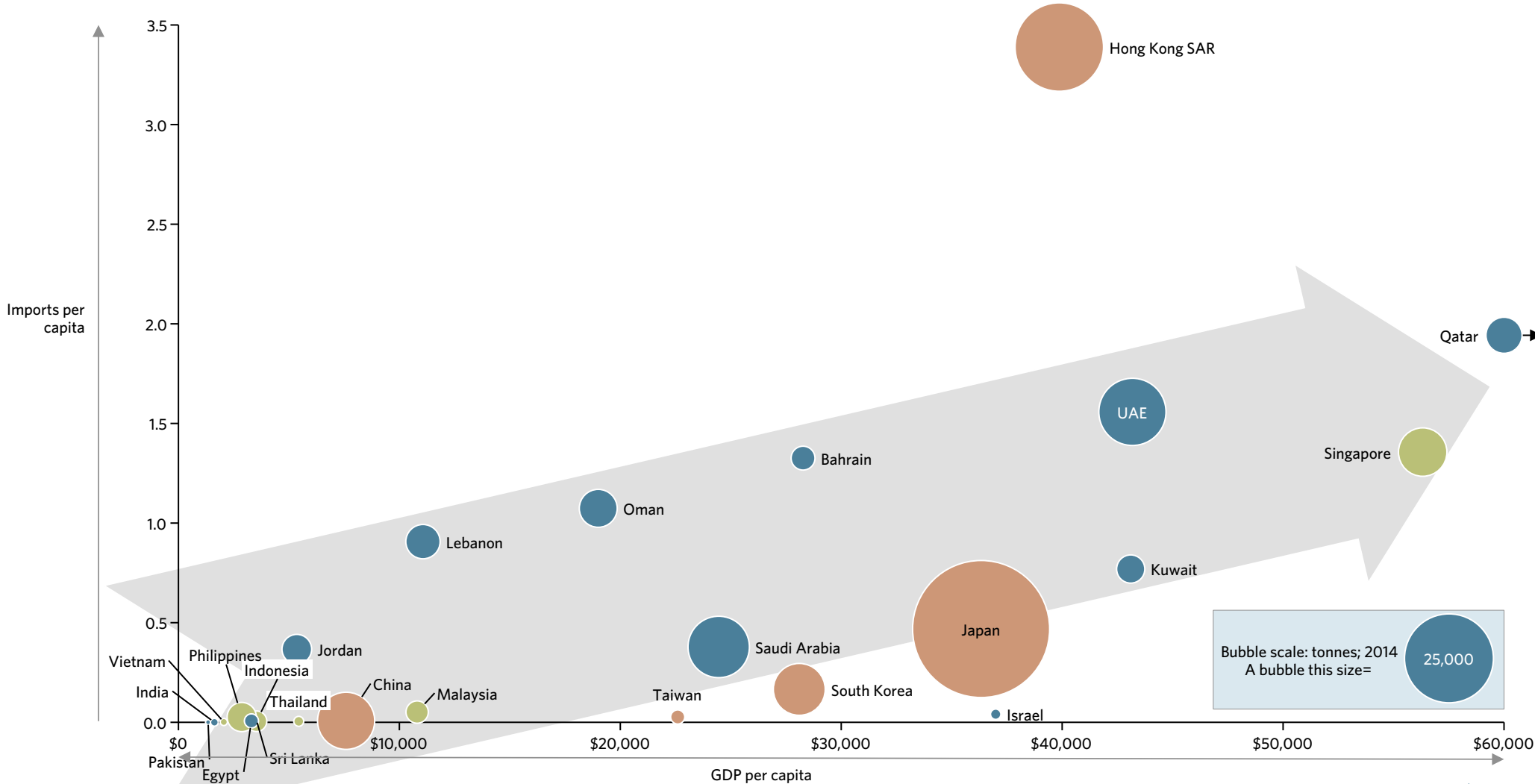


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Imported sausage consumption and aggregate imports appear partially driven by income per capita; Middle East stands out as higher in general

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

Kg; US\$; t; 2014

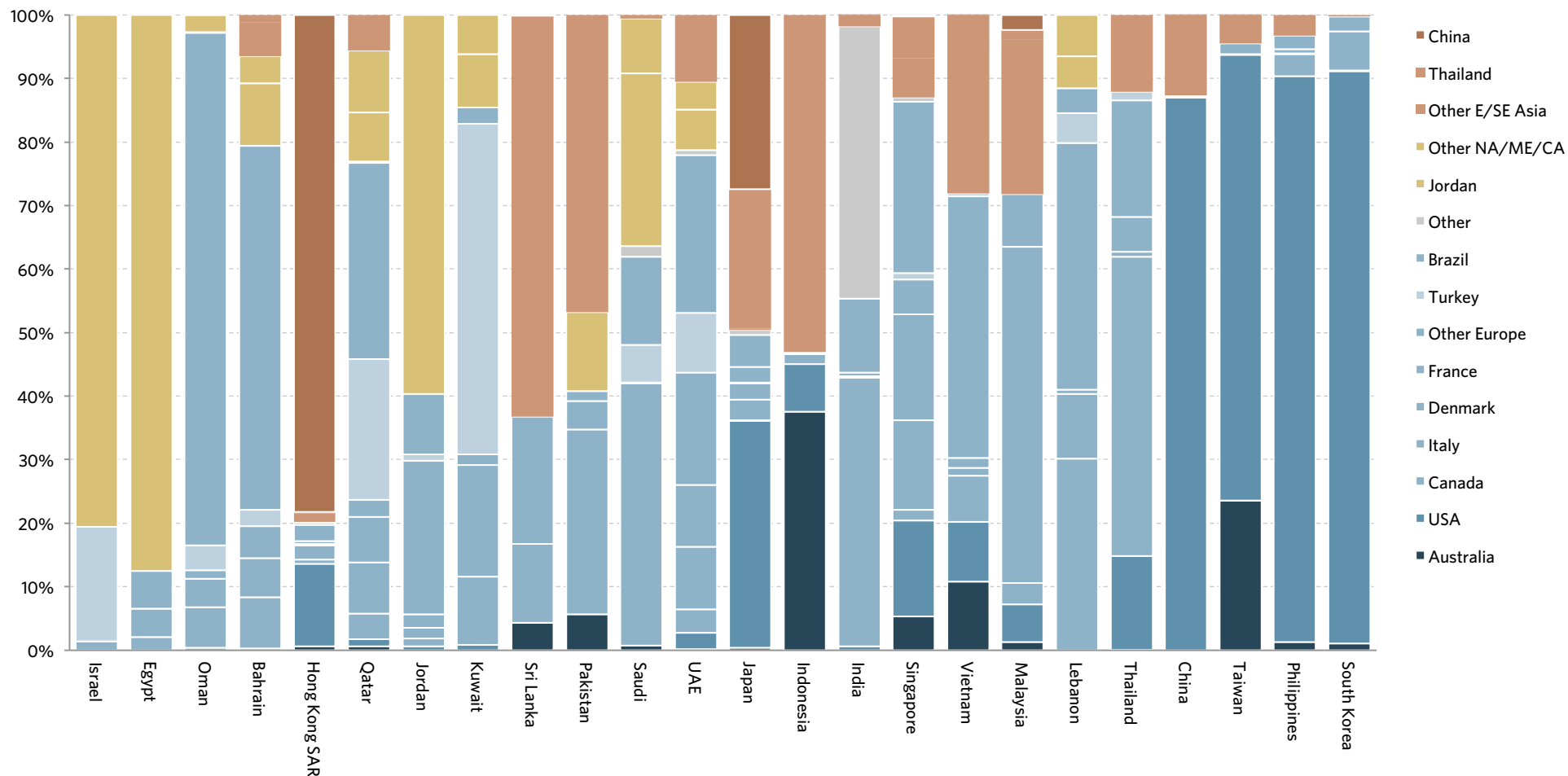


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Wikipedia (GDP/capita); Coriolis analysis and classifications

Market share varies by country; the USA is strong in East Asia; European countries stronger across the Middle East; China really only present at any level in Hong Kong and Japan

IMPORT VALUE MARKET SHARE BY MARKET BY KEY SUPPLIER

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

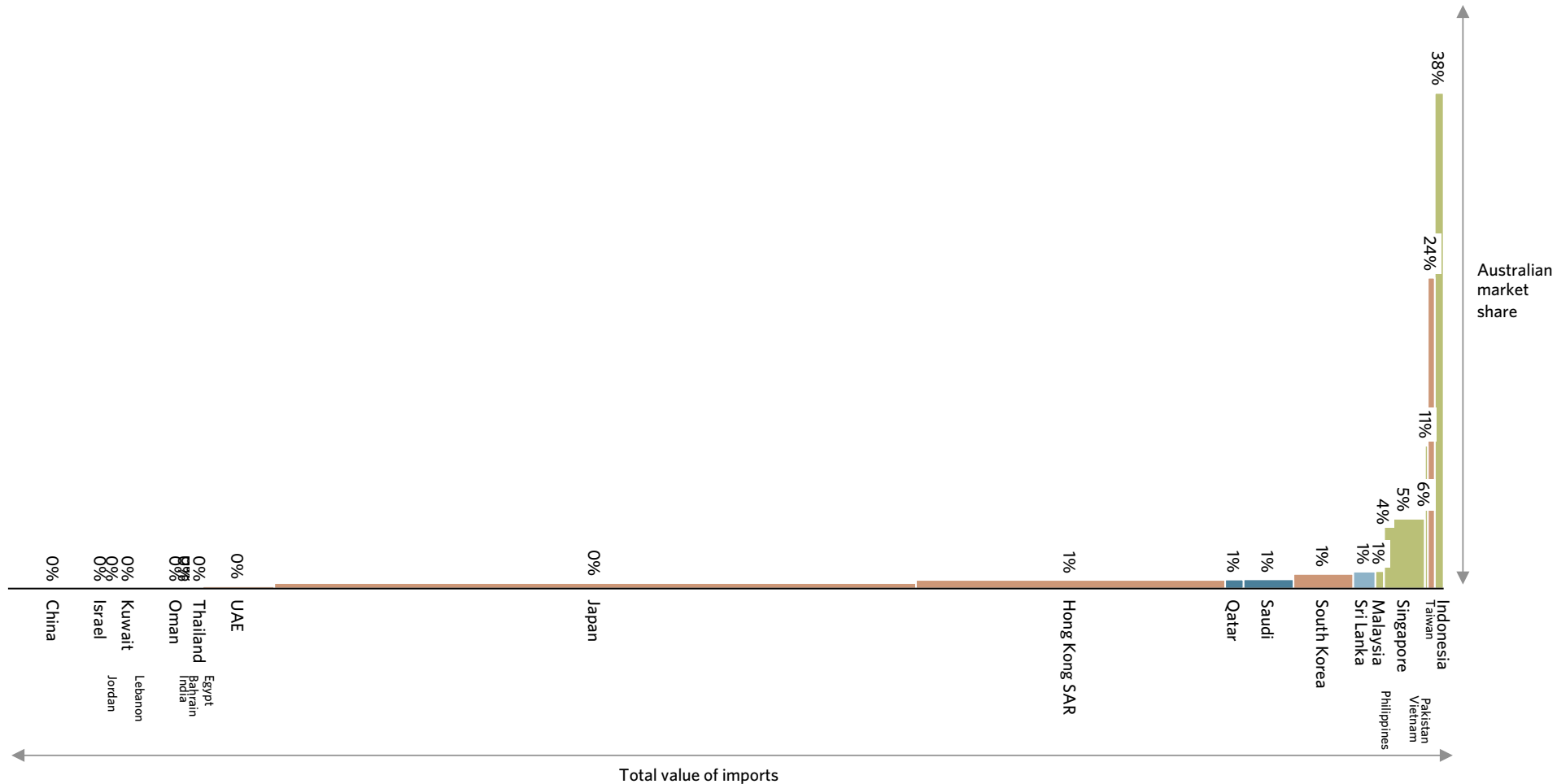


Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Western Australia has opportunities for sausage export growth in select Asian markets

AUSTRALIAN IMPORT VALUE MARKET VS. MARKET VALUE

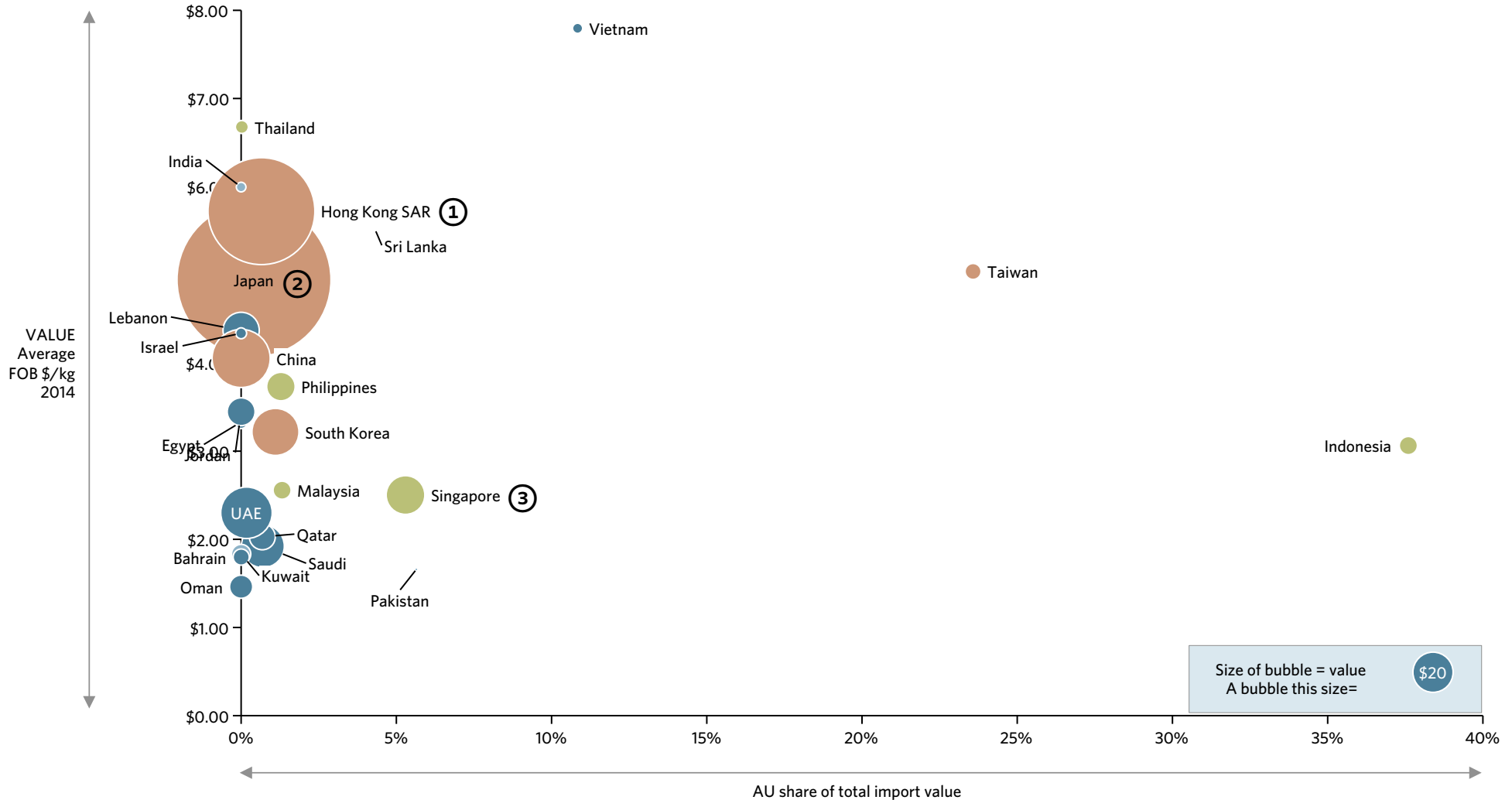
US\$m; FOB; 2014



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

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

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



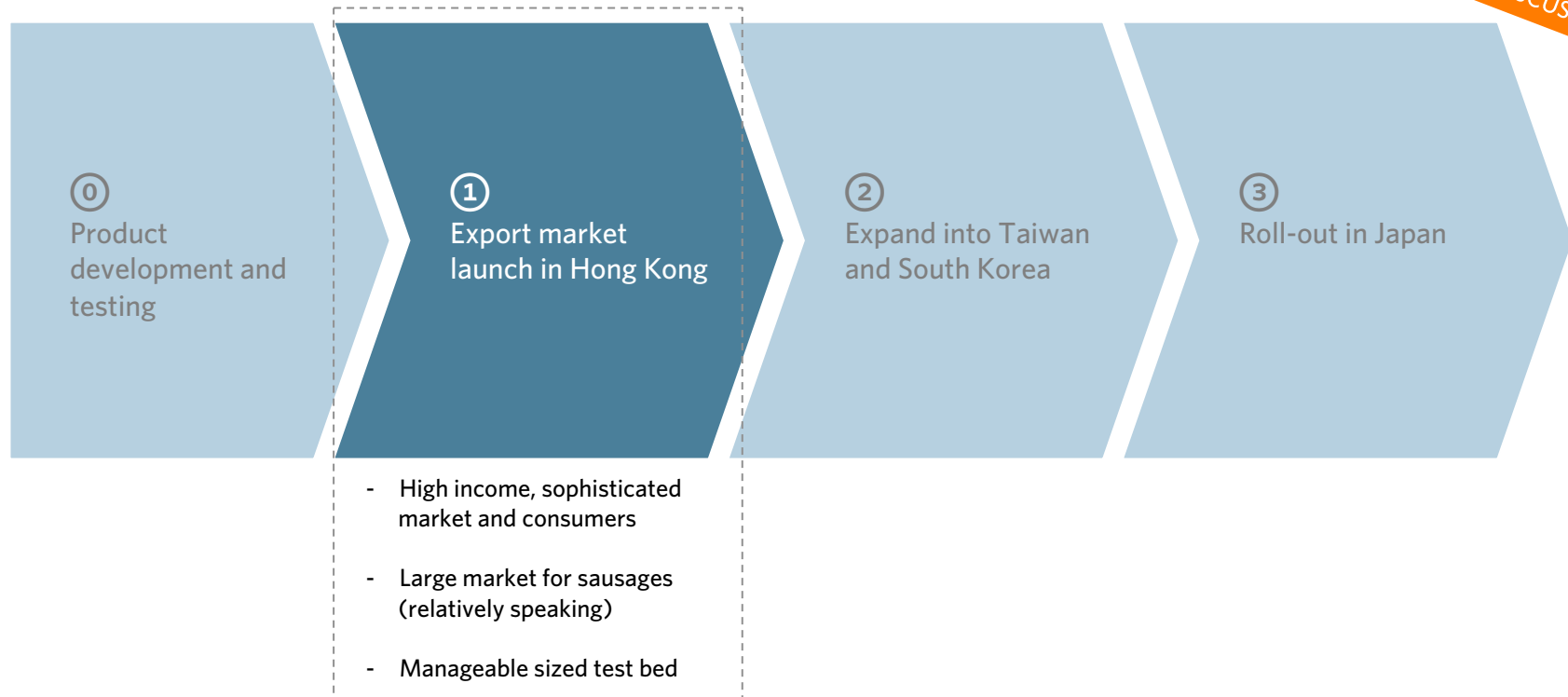
Note: data is as reported by sender (FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

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

PRELIMINARY "STRAW MAN" DEVELOPMENT & ROLLOUT PLAN FOR SAUSAGE 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 sausage exports to Asia

IS THE MARKET DEVELOPED & COMPETITIVE?

- The flow of sausages from the farm through to the consumer is relatively straight forward and simple
- Sausage prices are competitive in Asia
- Asian markets generally have a much less developed sausage range and offer than Western countries
- “Leading indicator” Western markets strongly suggest depth of range in Asian sausage markets will increase going forward
- Pork is the favoured protein in (almost) all Western countries but does not enjoy the same dominance in Asian markets

WHAT IS WA CAPABLE OF DELIVERING?

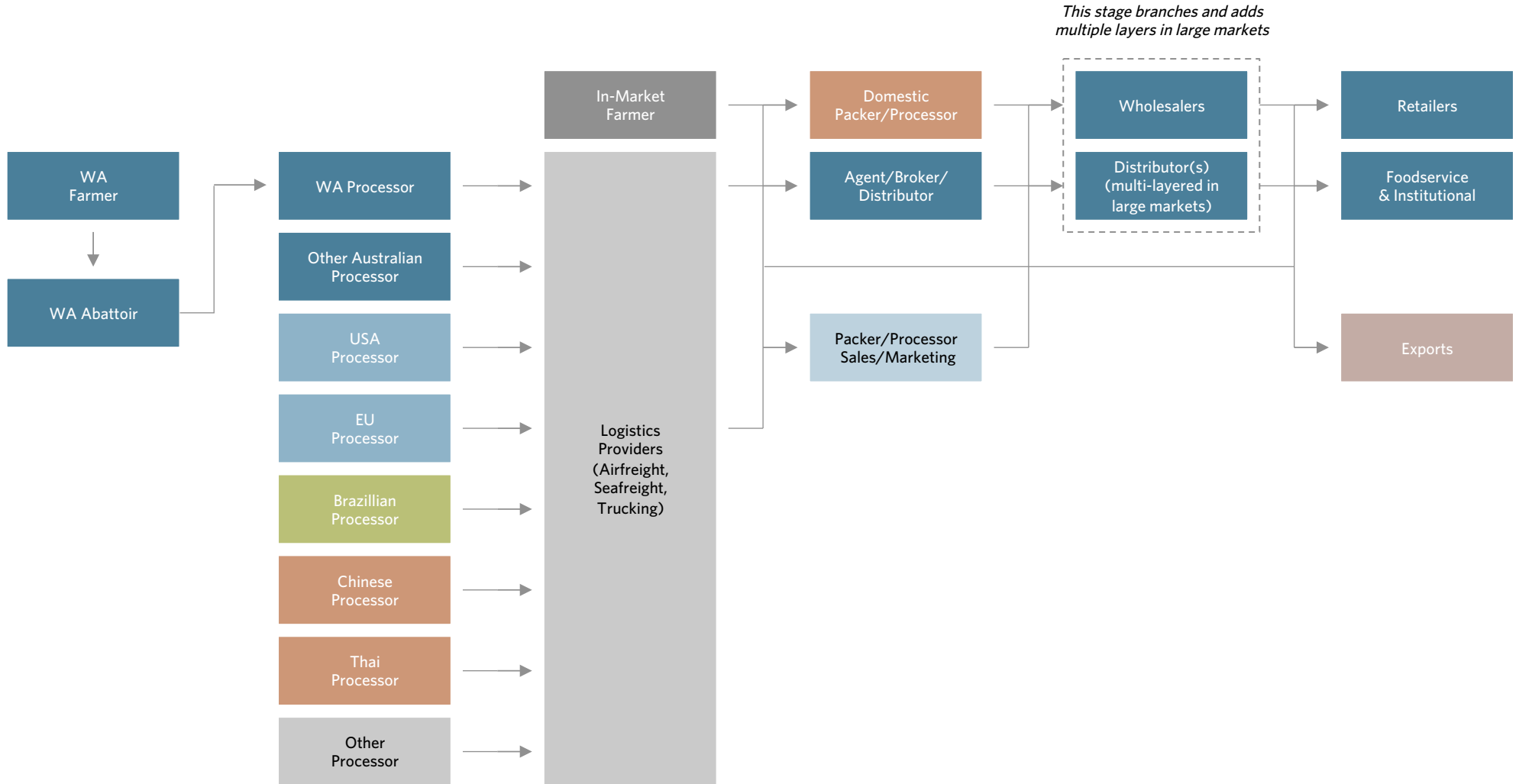
- A wide range of premium, value-adding product attributes emerged from our cross-country retailer survey
- Western Australian sausage producers need to continue to move forward and improve through new products
- Multiple potential positions exist to develop a premium sausage offer for Asia
- Products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

HOW IS THE MARKET STRUCTURED?

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

SIMPLIFIED MODEL OF SUPPLY CHAIN: SAUSAGES

Model; 2016



WHO IS THE COMPETITION? PRICING

Sausage prices are competitive in Asia

SHELF PRICE PER KG ACROSS SELECT SE ASIAN MARKETS AND AUSTRALIA: SAUSAGES

US\$/kg; Feb 2016



WHAT IS ON THE SHELF? RANGE IN MARKET

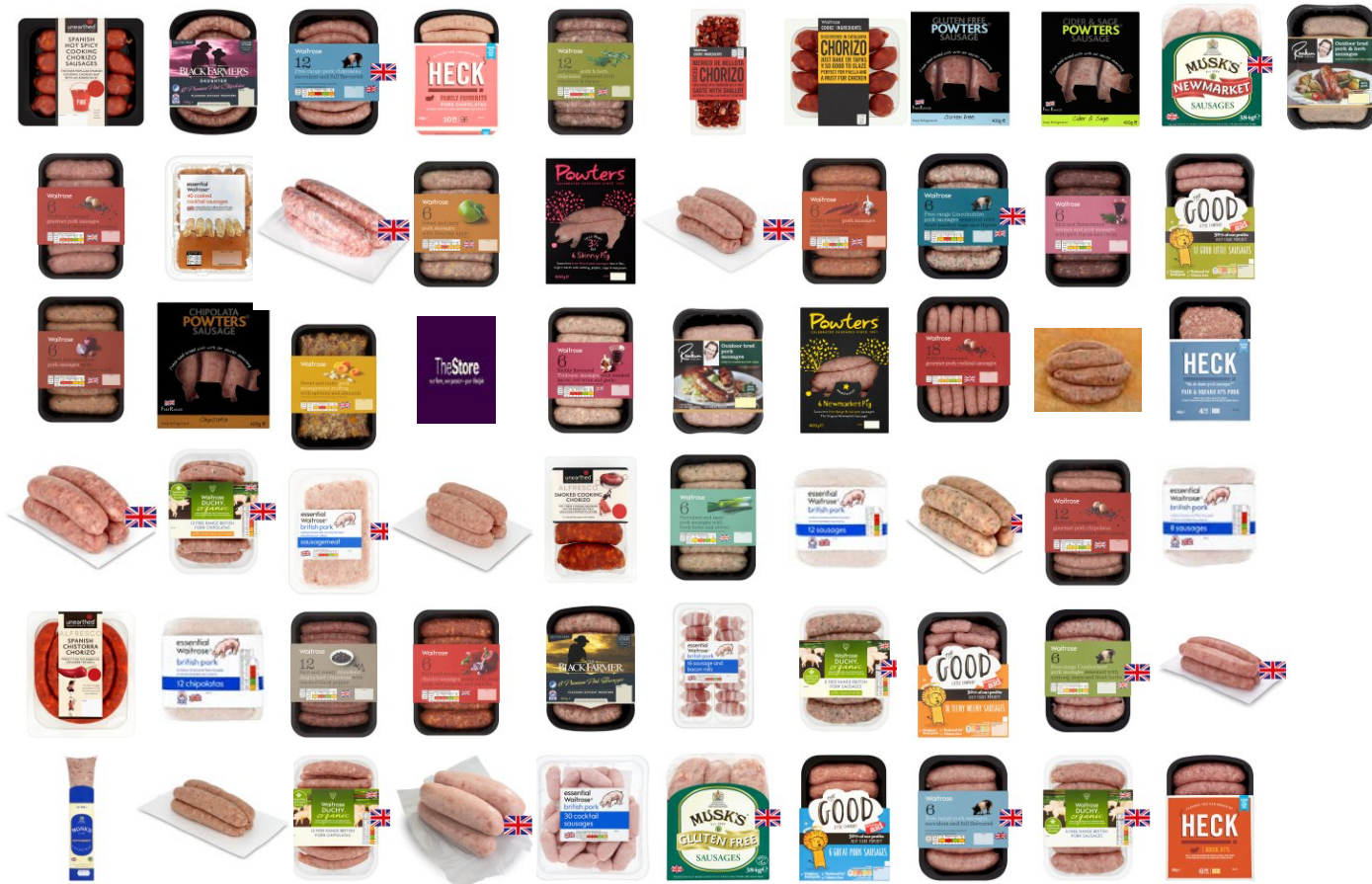
Asian markets generally have a much less developed sausage range and offer than Western countries

EXAMPLE: ACTUAL SAUSAGE RANGE ON SHELF

Feb 2016

Waitrose

London: GDP/Capita USA\$75,200



Cold Storage
The fresh food people

Singapore: GDP/Capita USA\$83,100

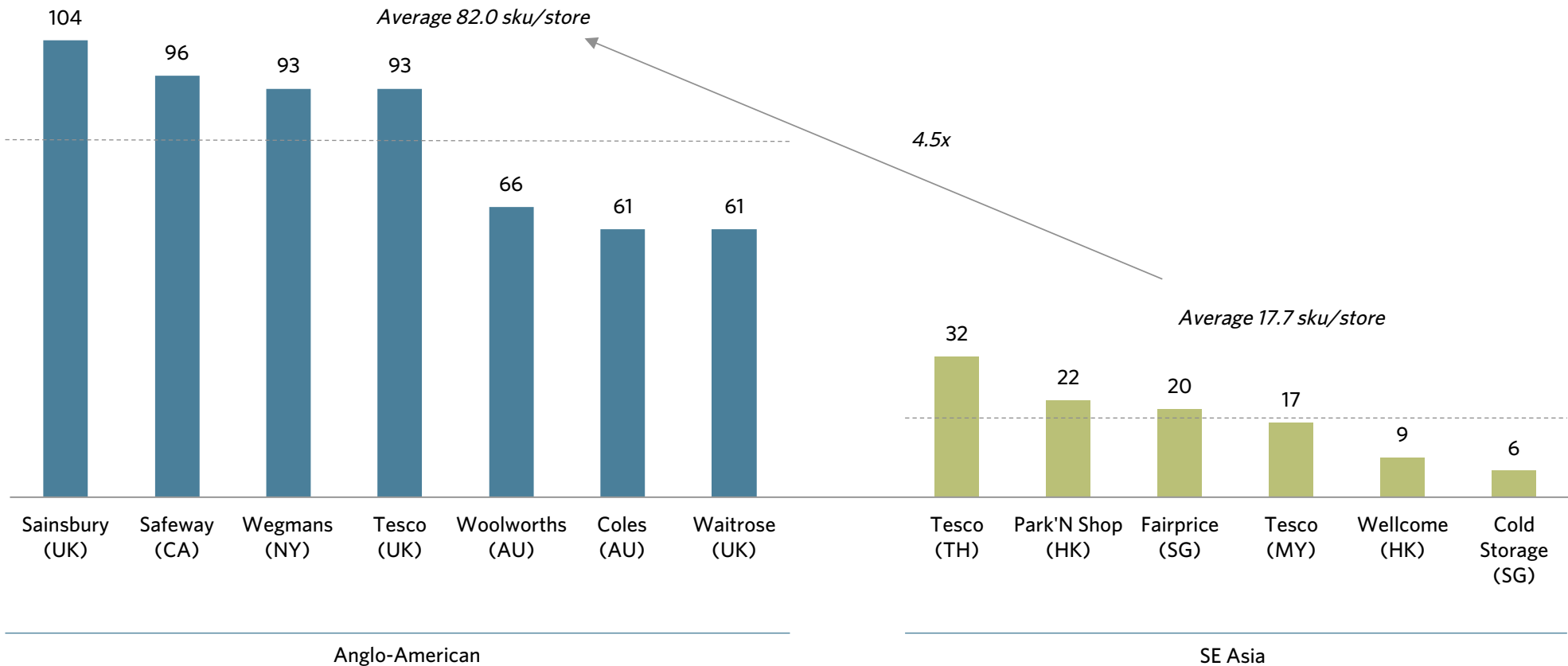


IS THE MARKET DEVELOPED & COMPETITIVE? RANGE

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

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

SKU; actual; Feb 2016

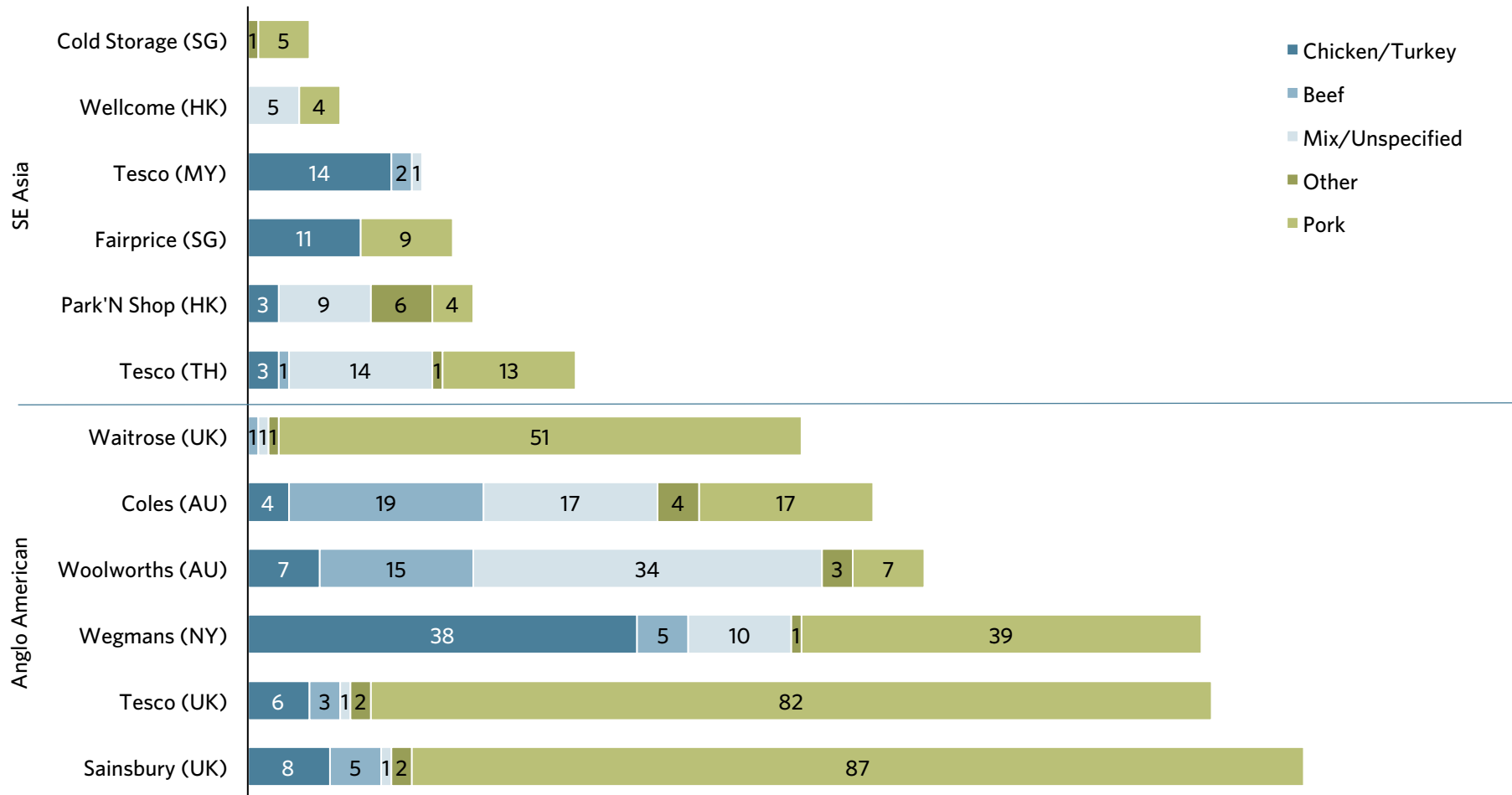


IS THE MARKET DEVELOPED & COMPETITIVE? SEGMENTATION

Pork is the favoured protein in (almost) all Western countries but does not enjoy the same dominance in Asian markets

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

SKU; actual; Feb 2016

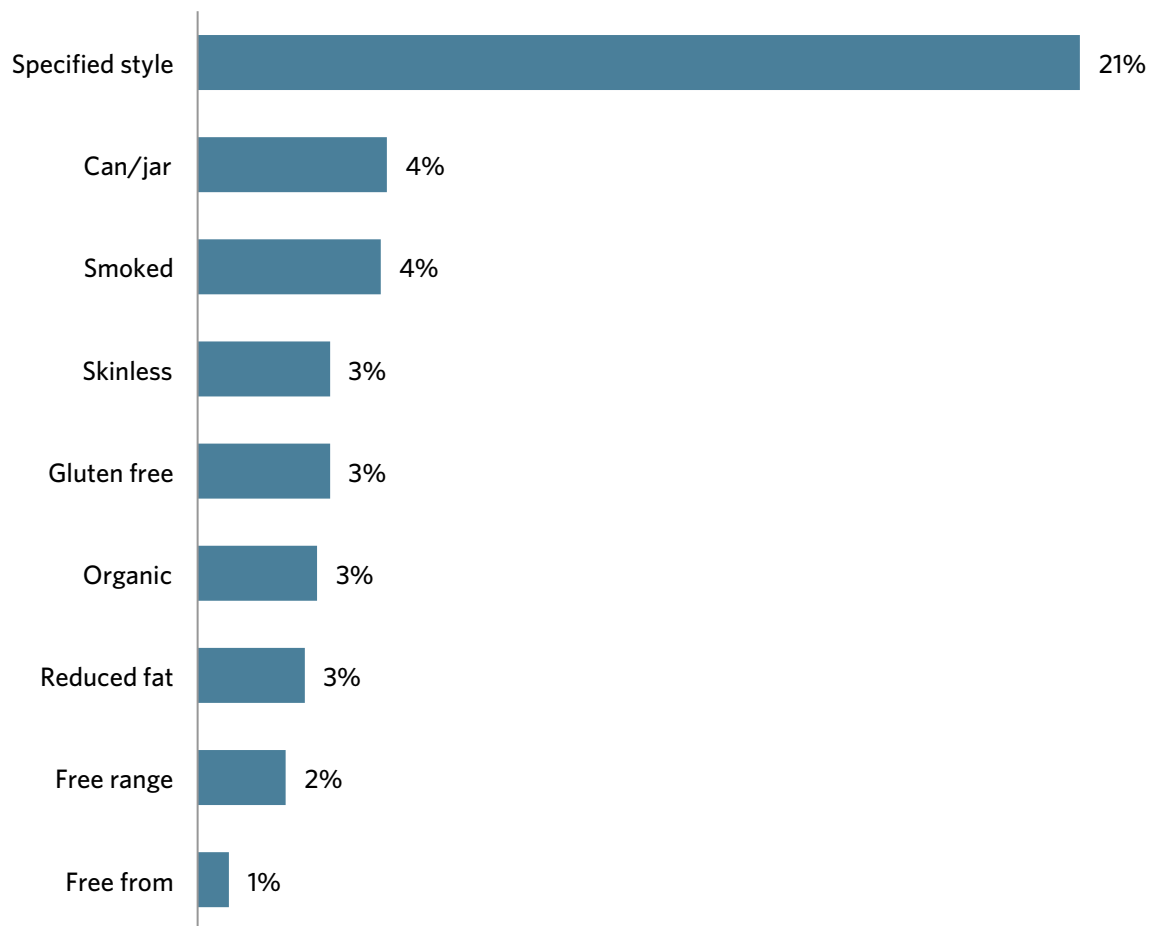


IS THE MARKET DEVELOPED & COMPETITIVE? PRODUCT ATTRIBUTES

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=577; Feb 2016



TAKEAWAYS

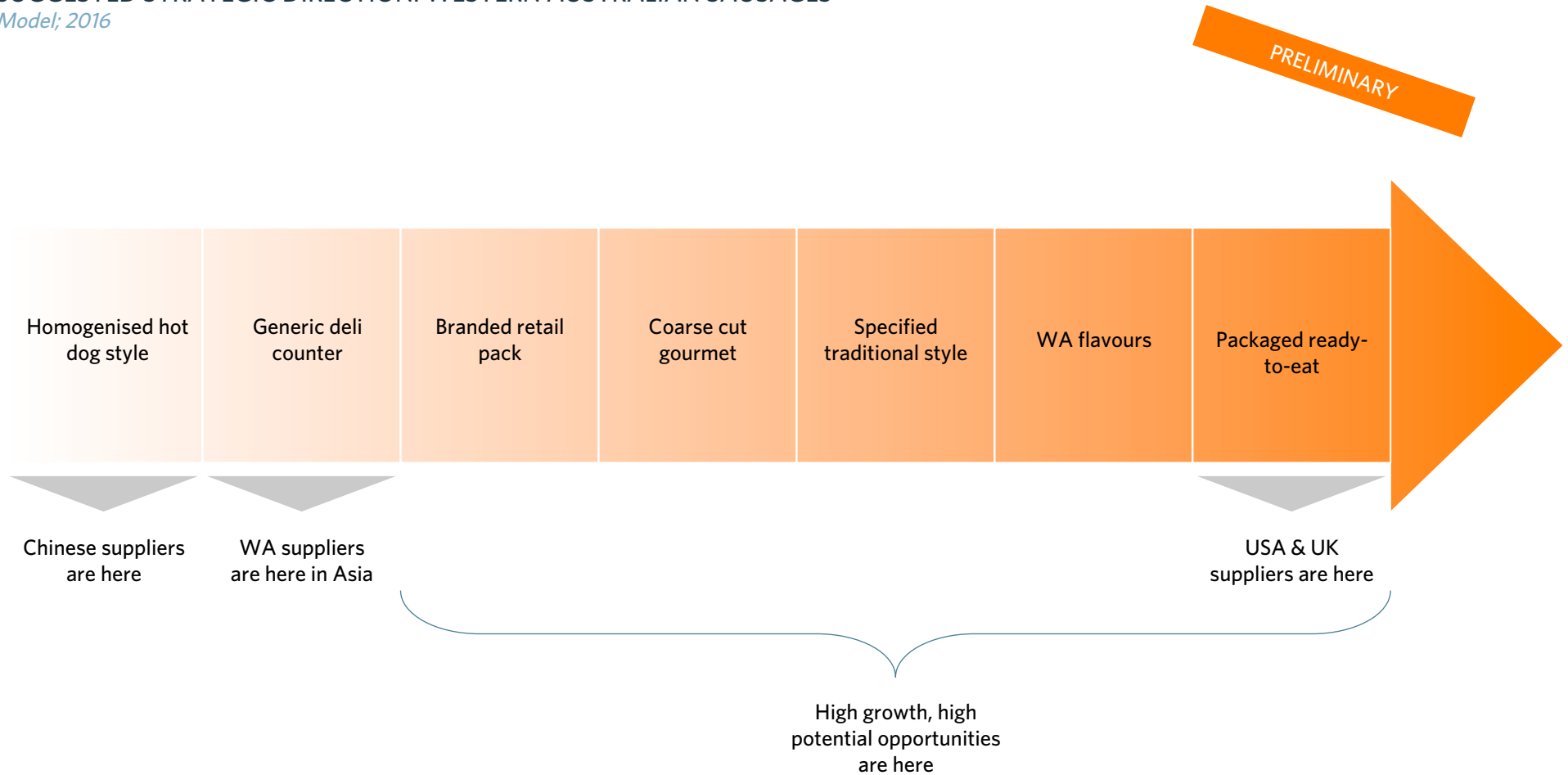
- This provide very clear instruction on what product attributes are succeeding the most across markets
- Western Australian sausage producers looking to grow value and share should focus in these areas
- Specifying style stands out, with ~1/4 observed product SKU being labelled with a style e.g. Cumberland
- Survey universe is all products in all listed retailers (across multiple countries)

WHAT IS WA CAPABLE OF DELIVERING? STRATEGIC DIRECTION

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

SUGGESTED STRATEGIC DIRECTION: WESTERN AUSTRALIAN SAUSAGES

Model; 2016



WHAT IS WA CAPABLE OF DELIVERING? CLAIMS

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

NEED TO GET PHOTO PERMISSION ON SOUTHERN FOREST IMAGE

IDENTIFIED POTENTIAL PREMIUM POSITIONS

Model; 2016



- Source of protein
- Reduced sodium
- Extra lean
- Vitamins and minerals



- Organic
- Identified source region
- Specialty variety
- Track & trace
- Free range
- RSPCA certified



- Premium ingredients
- Regional specialties
- WA sourced flavours
- Thick cut
- Traditional methods



- Ready-to-eat
- Resealable packaging
- Single serve packs
- Fast cooking

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 sausage offer

EXAMPLES OF PREMIUM PRODUCTS FROM OTHER MARKETS

Select; 2016



Bacon & Sausage Wraps

Pigs in blankets

Taste the Difference

Outdoor Bred Pork

Dry cured smoked streaky bacon

British pork

Taste tested by customers

Ready to cook



Freefrom pork sausages

Gluten free

Dairy free

British pork

Farmed in United Kingdom

Frozen

Made with 72% British pork



Cocktail sausages

With tomato ketchup

Ready-to-eat

Oven baked

EU Pork



Outback Spirit

Provenance

Kakadu plum & lemon aspen

100% Australian pork

Gluten free

Sow stall free

Coarse cut pork

Harvested by Aboriginal supply partners

WHAT IS A POTENTIAL WA OFFER?

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

HYPOTHETICAL EXAMPLE OF POTENTIAL PREMIUM PRODUCT FROM WA

Model; 2016

NEED TO GET PHOTO PERMISSION ON SOUTHERN FOREST IMAGE



Good source of protein

Reduced sodium

Extra lean



From West Australia

Free range

Australian Flag



WA sourced flavours

Traditional methods



Ready-to-eat

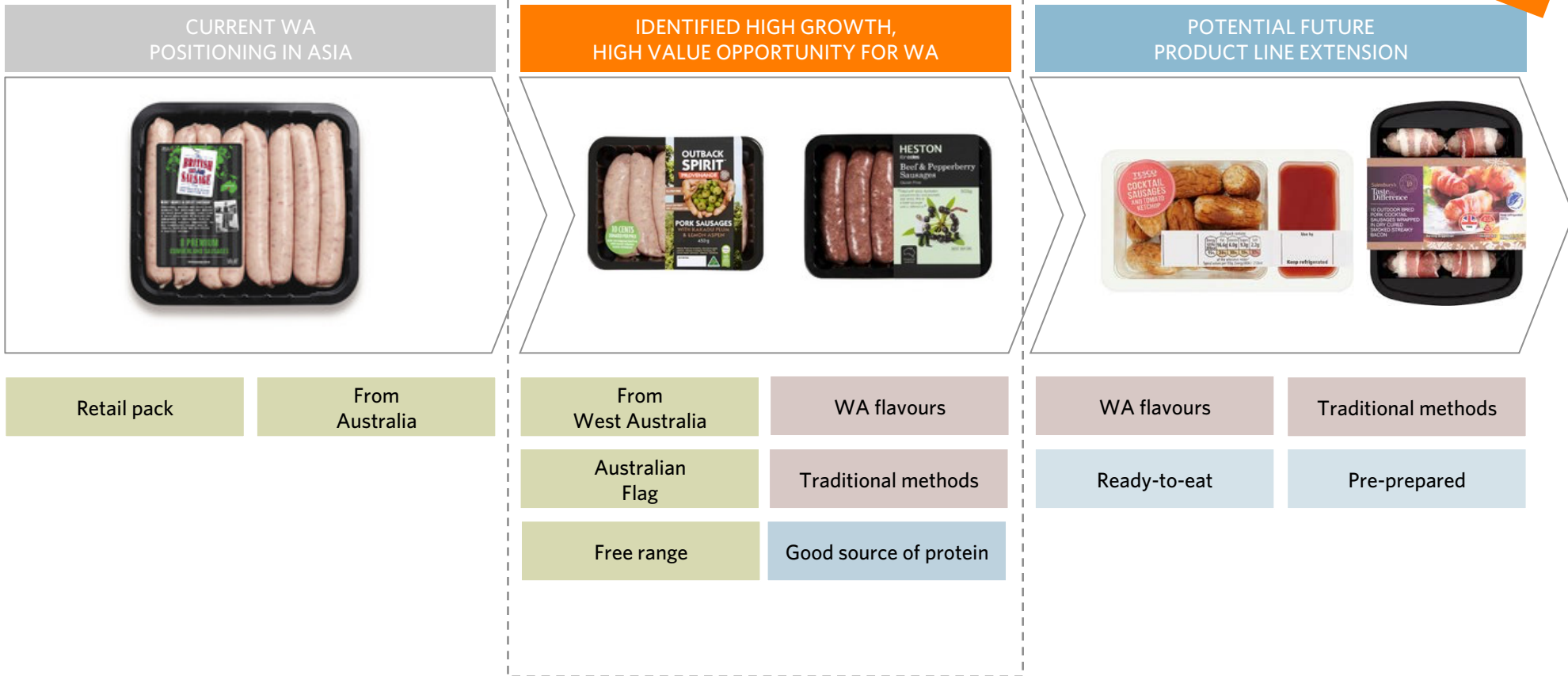
WHAT IS THE IDENTIFIED OPPORTUNITY?

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“STRAW MAN” MODEL
FOR DISCUSSION

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Model; 2016



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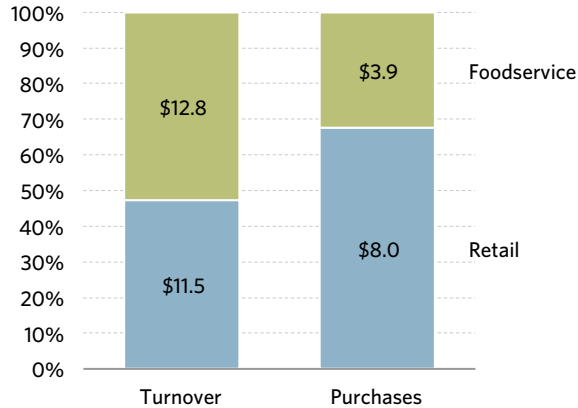


FOCUS MARKET - 1 - HONG KONG

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

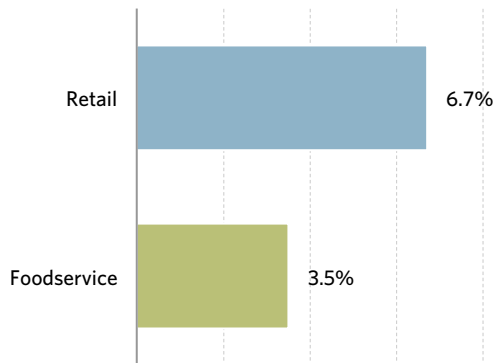
TURNOVER & PURCHASES

US\$b; 2014



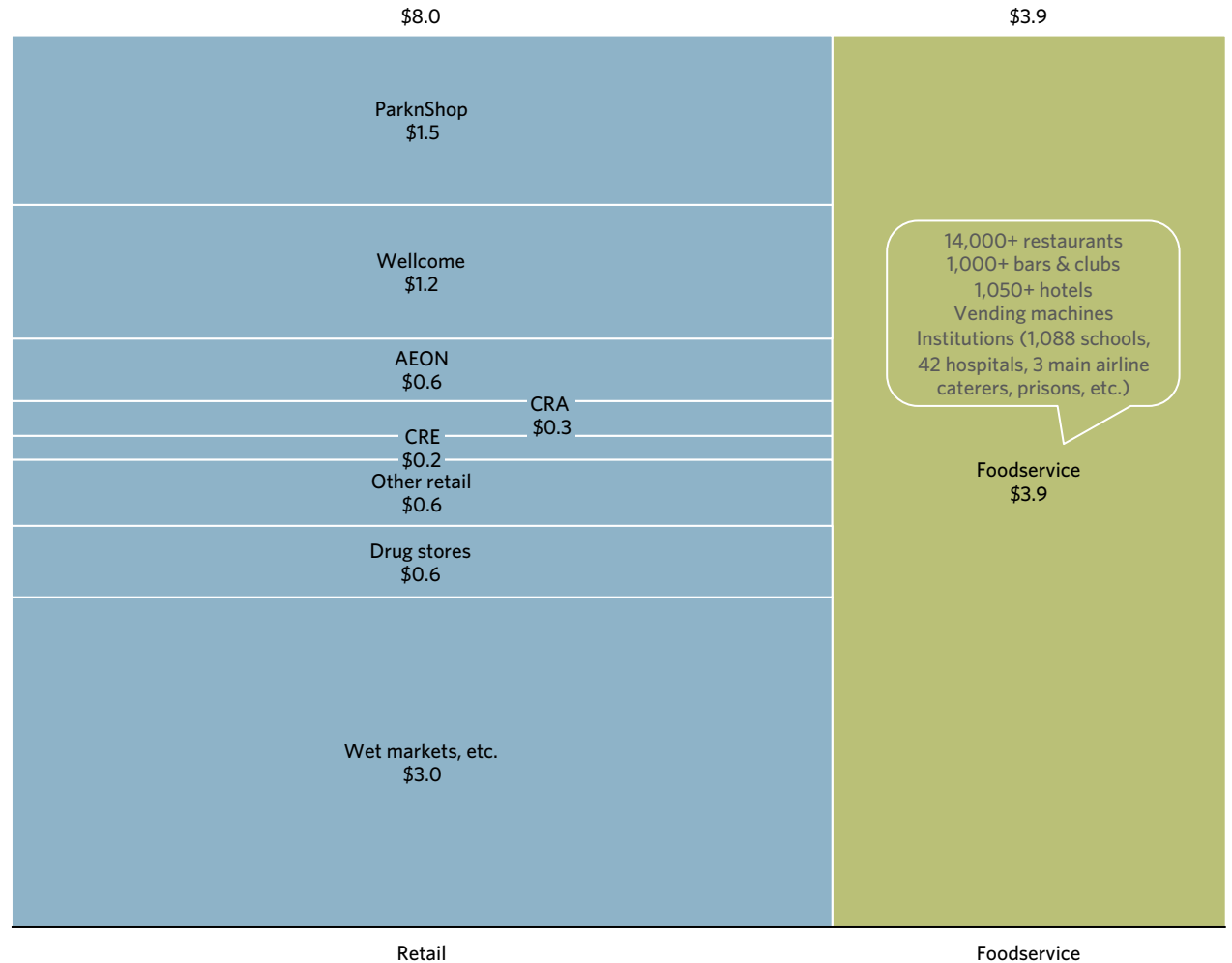
TURNOVER GROWTH RATE

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



ESTIMATED WHOLESALE FOOD & FMCG PURCHASES

US\$b; 2014



FOCUS MARKET - 1 - 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

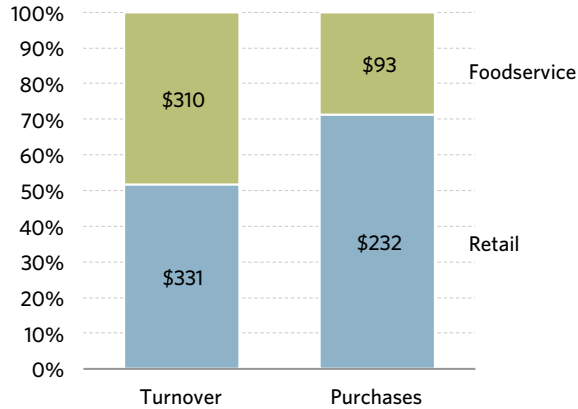
							
Firm	Wellcome	Park'N Shop	CR Vanguard	Dah Chong Hong	759 Stores	AEON Stores	Convenience Retail Asia
Ownership	Dairy Farm International/Jardine Matheson	A.S. Watson/Hutchison Whampoa	CRE/China Resources (SOE; China)	Dah Chong Hong/CITIC Pacific/CITIC (SOE; China)	Private; Hong Kong (Lam Wai Chun)	AEON (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 - 2 - JAPAN

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

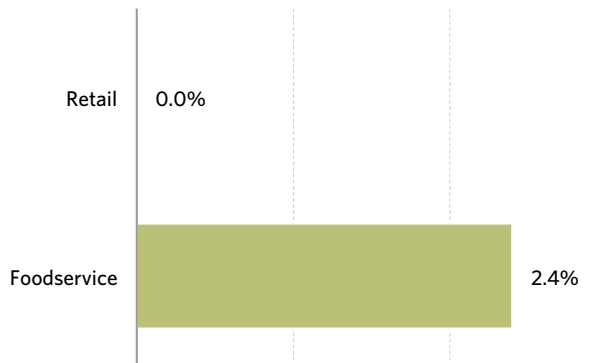
TURNOVER & PURCHASES

US\$b; 2014



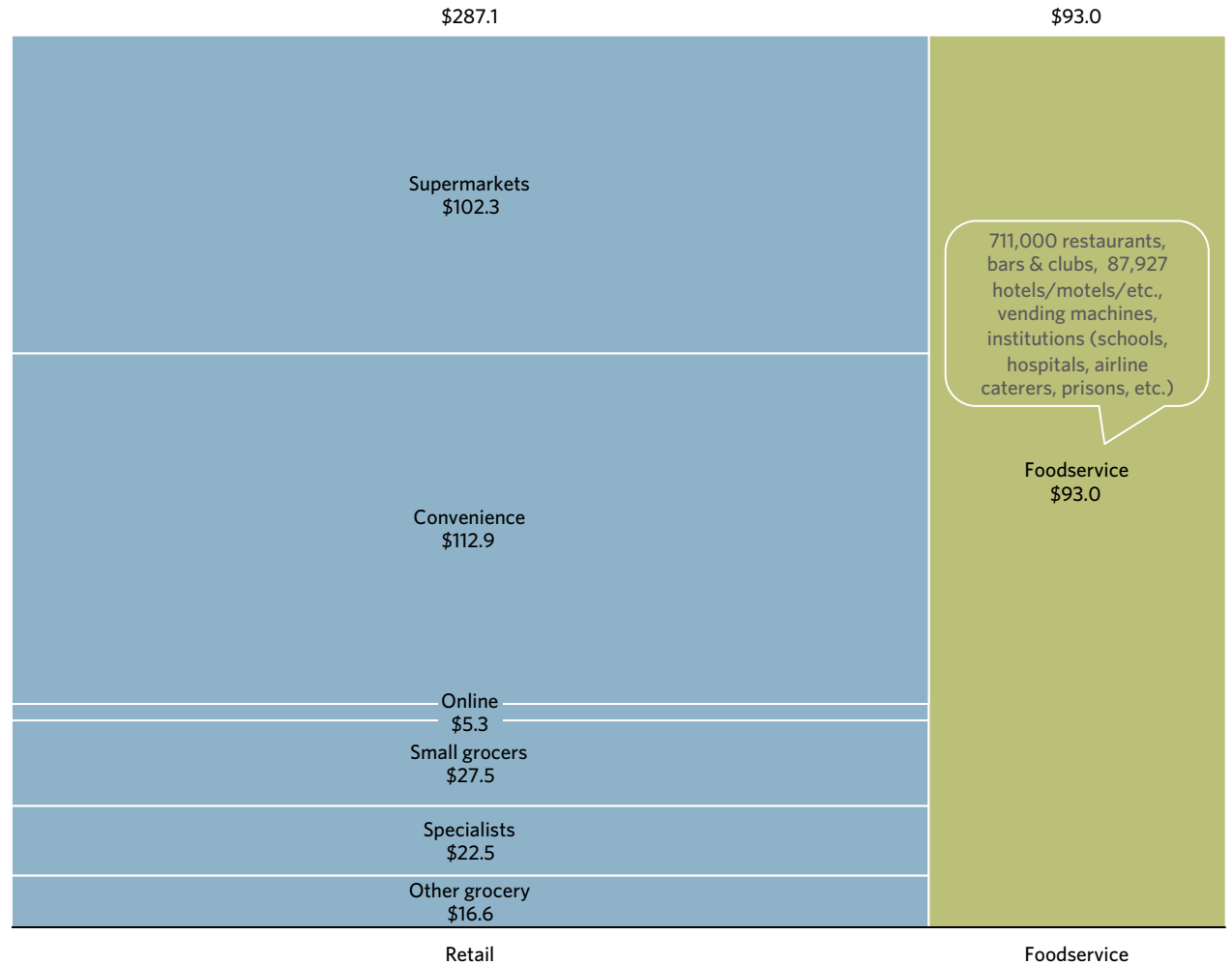
TURNOVER GROWTH RATE

% Y-O-Y; JPY; 2013v2014



ESTIMATED WHOLESALE FOOD & FMCG PURCHASES

US\$b; 2014




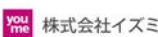














FOCUS MARKET - 2 - JAPAN

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

POTENTIAL IN-MARKET PARTNERS - JAPAN

2015 or as available

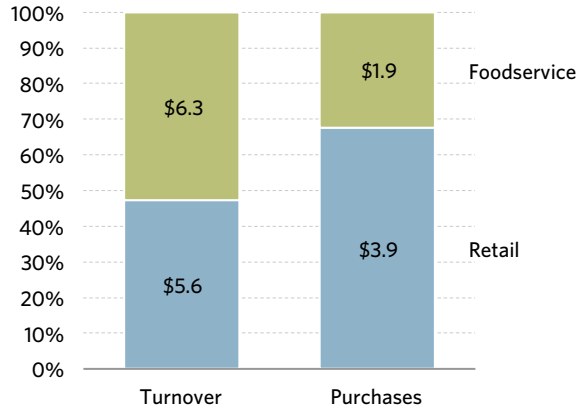
								
Firm	AEON Retail	Seven & I Holdings	Uny Group Holdings	Izumi Co. Ltd.	Life	Arcs	Lawson	Family Mart
Ownership	Japan; listed	Japan; listed	Japan; listed	Japan; listed	Japan; listed	Japan	Japan; listed	Japan; listed
Website	www.aeon.info www.maxvalu.co.jp www.daiei.co.jp www.ministop.co.jp	www.7andi.com 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 - 3 - SINGAPORE

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

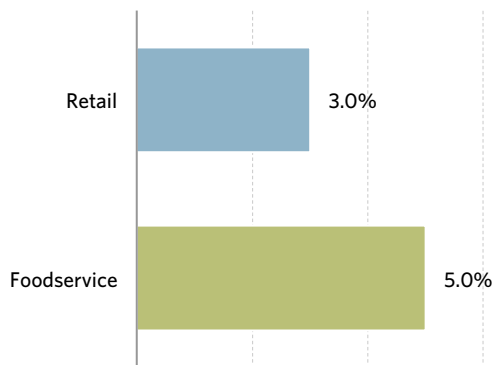
TURNOVER & PURCHASES

US\$b; 2014



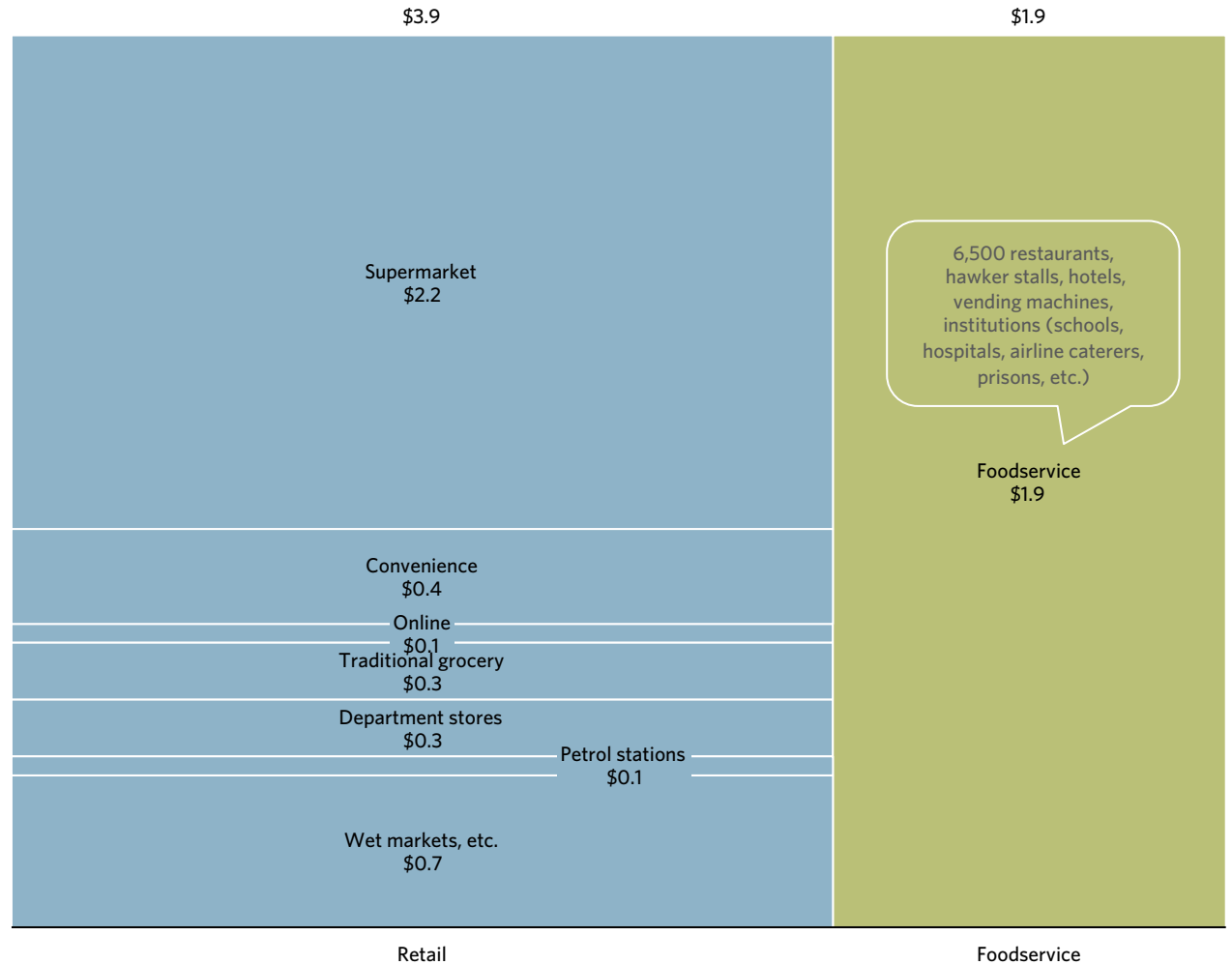
TURNOVER GROWTH RATE

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



ESTIMATED WHOLESALE FOOD & FMCG PURCHASES

US\$b; 2014









FOCUS MARKET - 3 - 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				

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

BRITISH SAUSAGE CO. 	DARDANUP BUTCHERING COMPANY (DBC) 	DEL BASSO SMALLGOODS 
ADDRESS: 36 Selkis Rd, Bibra Lake, WA 6163	ADDRESS: Wimbridge Road, Picton WA 6229	ADDRESS: 4 Frobisher St, Osborne Park, WA 6017
PHONE: 08 9499 2100	PHONE: 08 9780 6000	PHONE: 08 9444 0811
WEBSITE: www.britishsausage.com.au	WEBSITE: www.dbctalkabouttaste.com.au	WEBSITE: www.delbasso.com.au
D'ORSOGNA 	HARVEY BEEF 	HARVEY PORK 
ADDRESS: Leach Hwy & Stock Rd, Palmyra, WA 6157	ADDRESS: Lot 113 Seventh St, Harvey, WA 6220	ADDRESS: Alexander Road, Harvey WA 6220
PHONE: 08 6313 6990	PHONE: 08 9729 0000	PHONE: 0459 124 294
WEBSITE: www.dorsogna.com.au	WEBSITE: www.harveybeef.com.au	WEBSITE: www.harveypork.com.au
MILNE AGRIGROUP 	MONDO DORO 	PRINCI'S SMALLGOODS 
ADDRESS: 103 Welshpool Rd, Welshpool, WA 6106	ADDRESS: 3 Sainsbury Rd, O'Connor, WA 6163	ADDRESS: 7 Irvine Drive, Malaga, WA 6090
PHONE: 08 9351 0750	PHONE: 08 9314 5445	PHONE: 08 9249 7359
WEBSITE: www.milne.com.au	WEBSITE: www.mondodoro.com.au	WEBSITE: www.princismallgoods.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.