



TARGET MARKET OPPORTUNITIES IN ASIA FOR WINE

Part of Asia Market Success, April 2016



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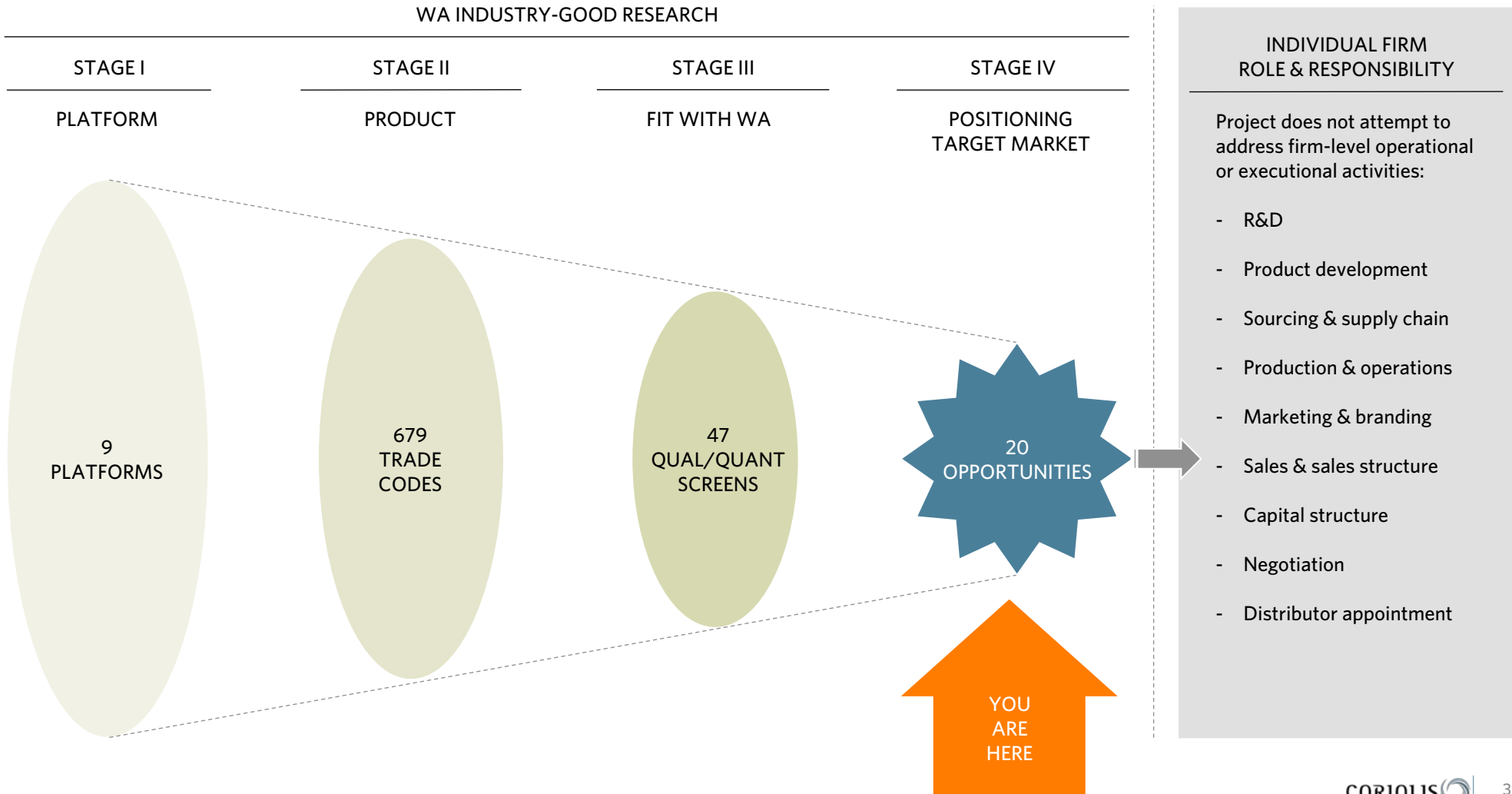
FINAL v100; April 2016

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

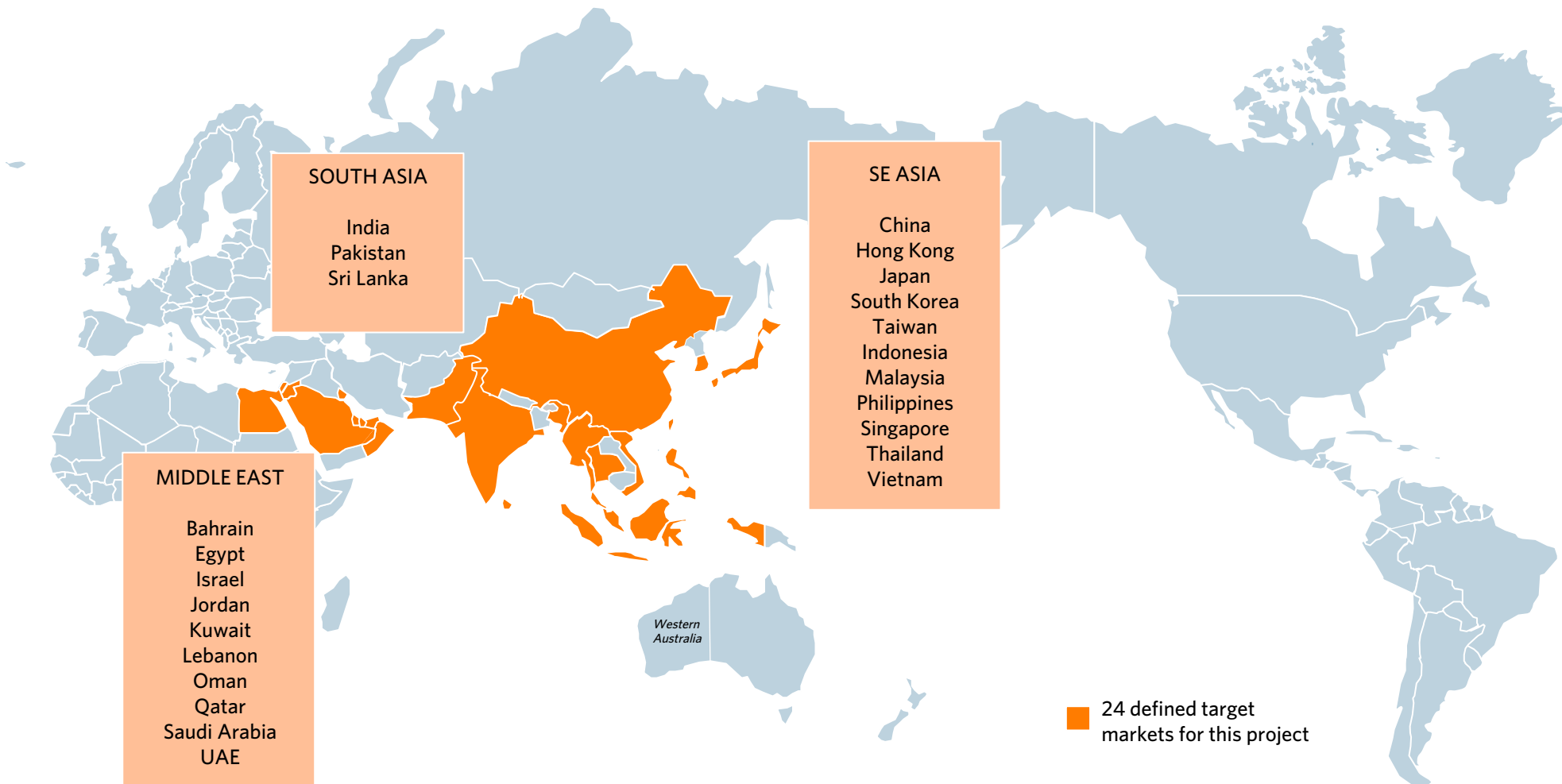
Model; 2016



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; 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?

Wine emerged in Phase I as one of twenty “high growth, high potential” opportunities for Western Australia; wine is an alcoholic beverage typically consumed in social occasions

PRODUCT OVERVIEW

Example; 2016



PRODUCT PROFILE

HS Code	220421
Product	Wine of fresh grapes, including fortified wines and grape must with fermentation prevented or arrested by the addition of alcohol, in containers holding 2 litres or less
Out-of-scope	Sparkling wine, bulk containers of wine, other grape must, vermouth and other wine flavoured with plant or aromatic substances, mixtures of fermented beverages, grape juice, etc. as all are covered under other screened trade codes
Origin	Earliest archaeological evidence from Georgia c. 6000 BC, likely from early humans
Example ingredients	Grapes, yeasts, malolactic bacteria, calcium carbonate, sulphur dioxide
Forms/usage	<ul style="list-style-type: none">- Drinking at home or out in restaurants- Cellaring- Gift giving
Drivers of consumer/market success	<ul style="list-style-type: none">- Luxury product- Status conferring- Ideal gift, especially for corporate- Potential to increase value through cellaring

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 wine exports to Asia

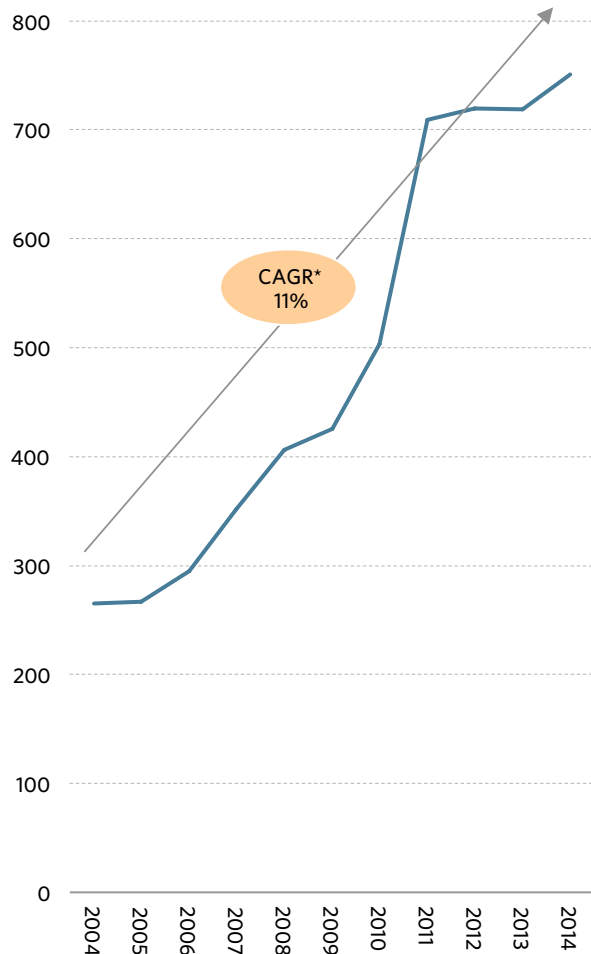
- Asian wine imports are rising, with import value growth being driven by increasing volume; average FOB (free-on-board) prices are showing moderate growth
- Asian wine imports come from the “Old World” (France, Italy and other European countries), the “New World” (Australia, Chile, the USA, etc.) and Asian inter-regional trade
 - France stands out for driving wine import value growth in Asia & the Middle East over the past decade; Australia follows in second place
 - Average FOB price to target Asian markets vary by supplier, with France appearing to set the pricing lead
- East Asia dominates the Asian/Middle East market for wine; China, Hong Kong and Japan stand out for size
 - East Asia is driving growth in wine imports
 - China stands out for growing volume and value
 - Average wine import prices vary by country, with Hong Kong standing out as a large market paying premium prices
 - Imported wine consumption and aggregate wine imports appear driven - in part - by income per capita; a number of markets appear to have long-run penetration upside
- Market share varies by country; European countries stronger in Middle East than E/SE Asia; New World has strength across East and South East Asia
- Western Australia has opportunities for wine export growth in select Asian markets; SE Asia stands out as a region that pays good prices (page earlier) and where Australia already has a strong position
- Data supports new high value, premium wine opportunities being initially launched in (1) Singapore, (2) Hong Kong and (3) China
- As a “Straw Man” for discussion, we identify an export market roll-out plan

Asian wine imports are rising, with import value growth being driven by increasing volume; average FOB (free-on-board) prices are showing moderate growth

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

VOLUME

L; m; 2004-2014



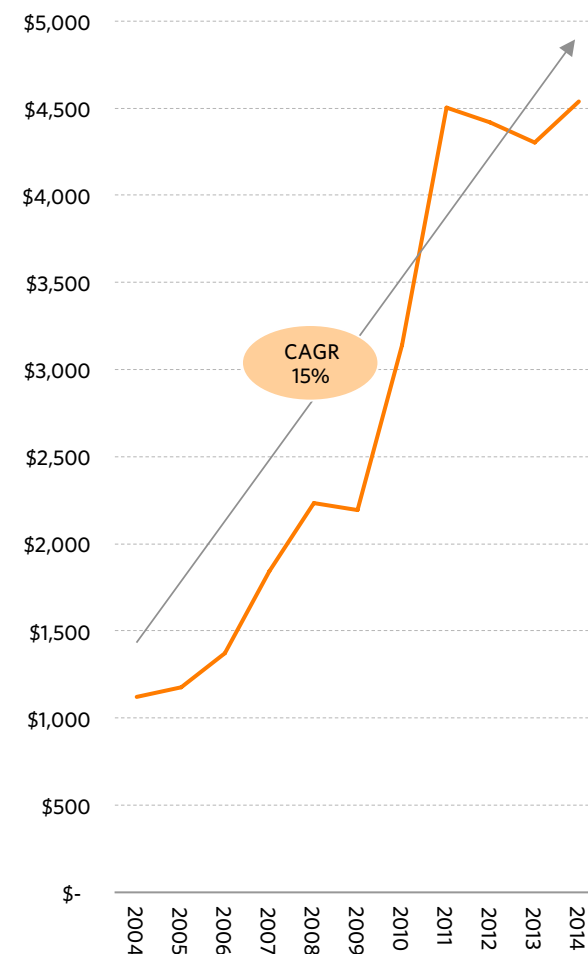
AVERAGE PRICE PER LITRE

US\$; 2004-2014



VALUE

US\$m; 2004-2014



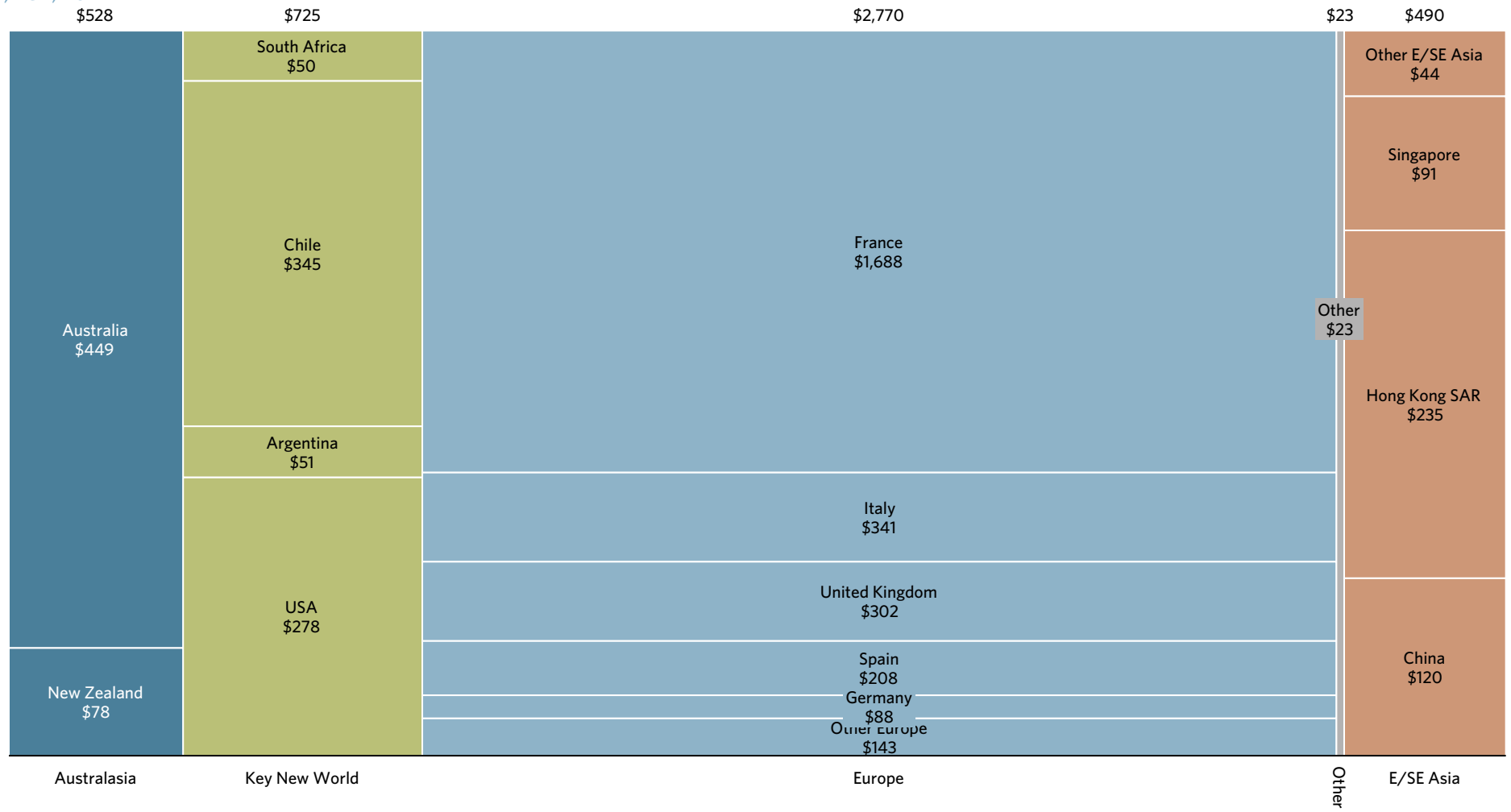
* Compound Annual Growth Rate; Source: UN Comtrade database; Coriolis analysis and classifications

Asian wine imports come from the “Old World” (France, Italy and other European countries), the “New World (Australia, Chile, the USA, etc.) and Asian inter-regional trade

EXPORT VALUE BY SUPPLIER TO TARGET REGION

US\$m; FOB; 2014

TOTAL = US\$4,536m

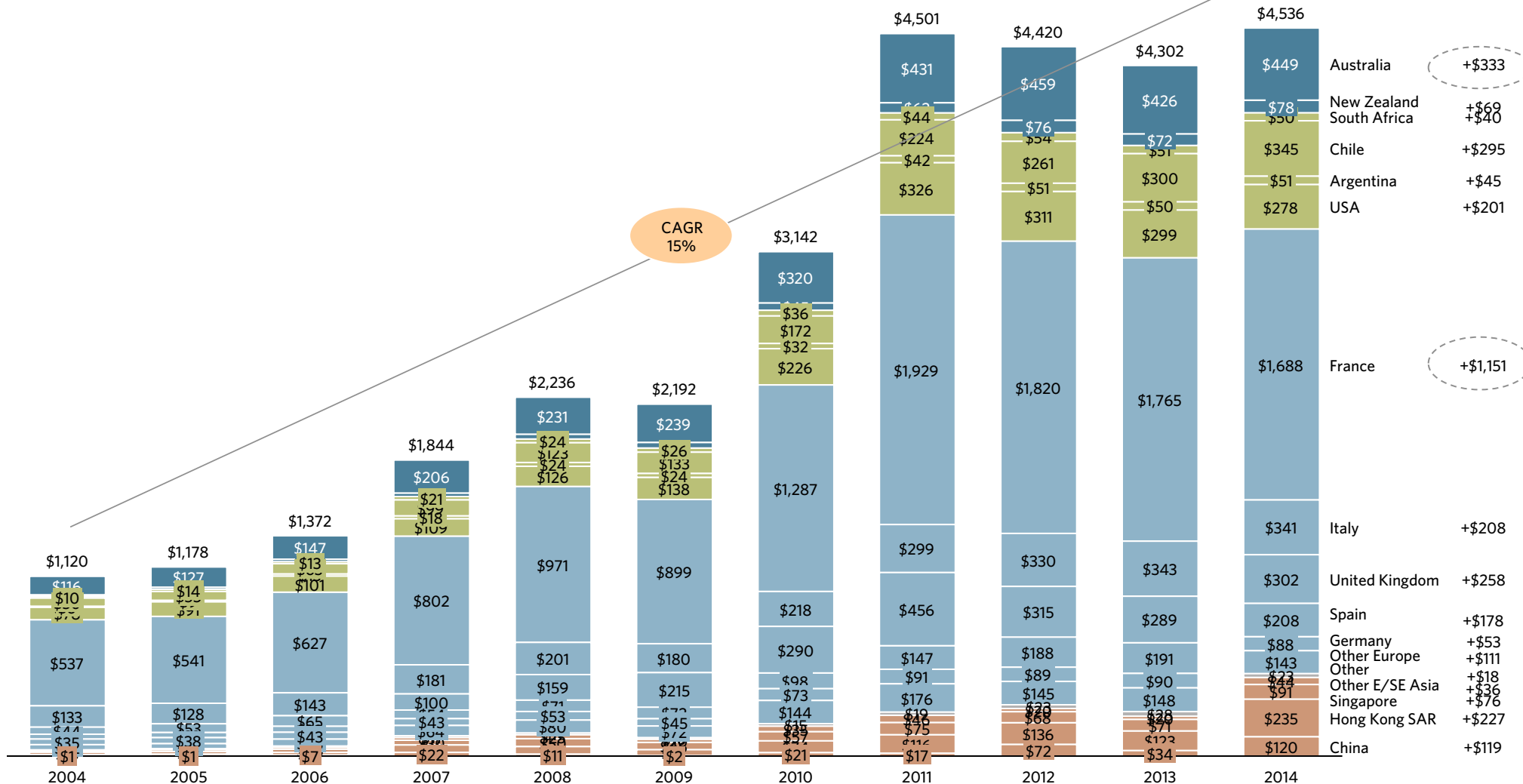


France stands out for driving wine import value growth in Asia & the Middle East over the past decade; Australia follows in second place

10y ABS

EXPORT VALUE BY SUPPLIER TO TARGET REGION

US\$m; FOB; 2004-2014

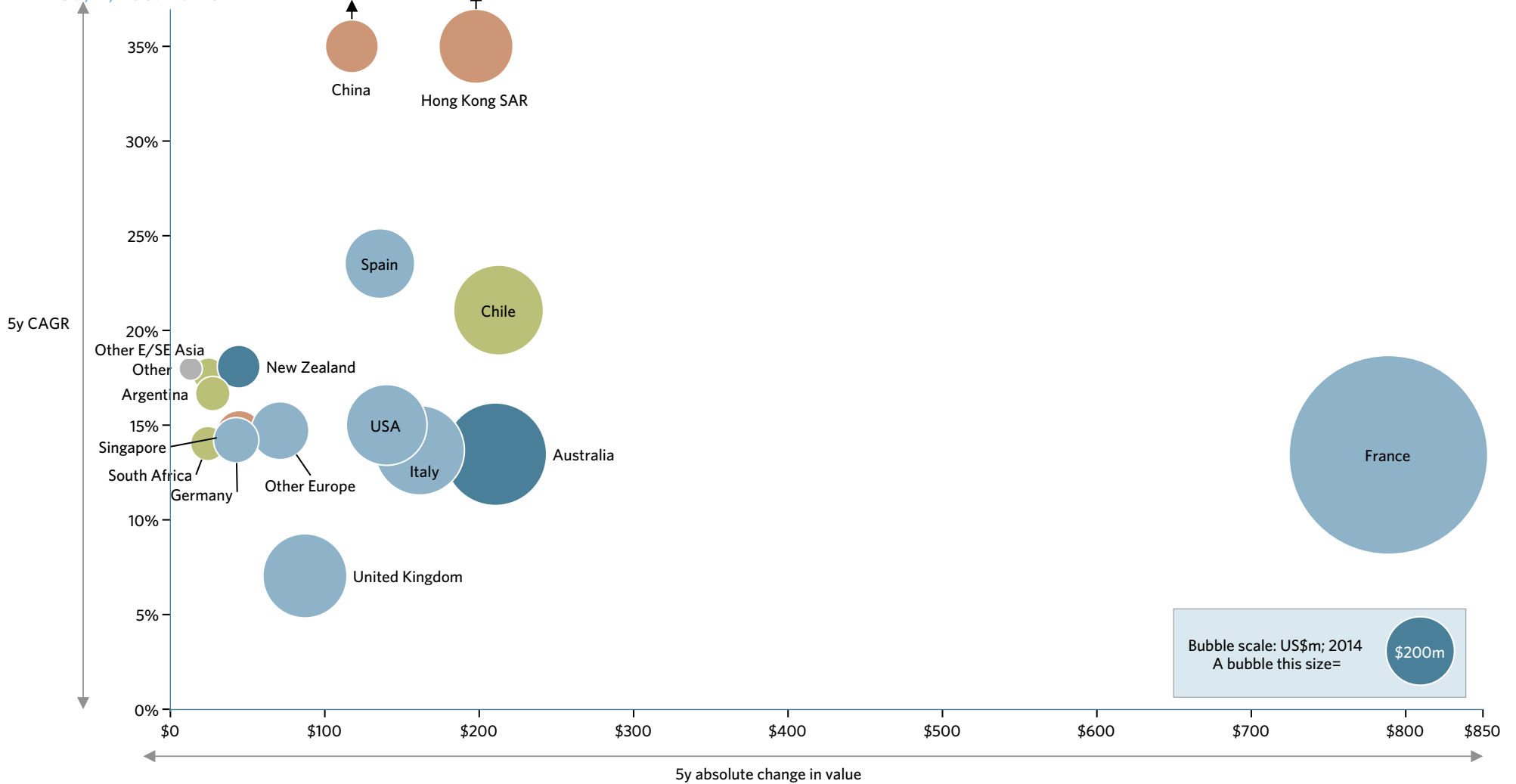


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

France leads in driving absolute 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

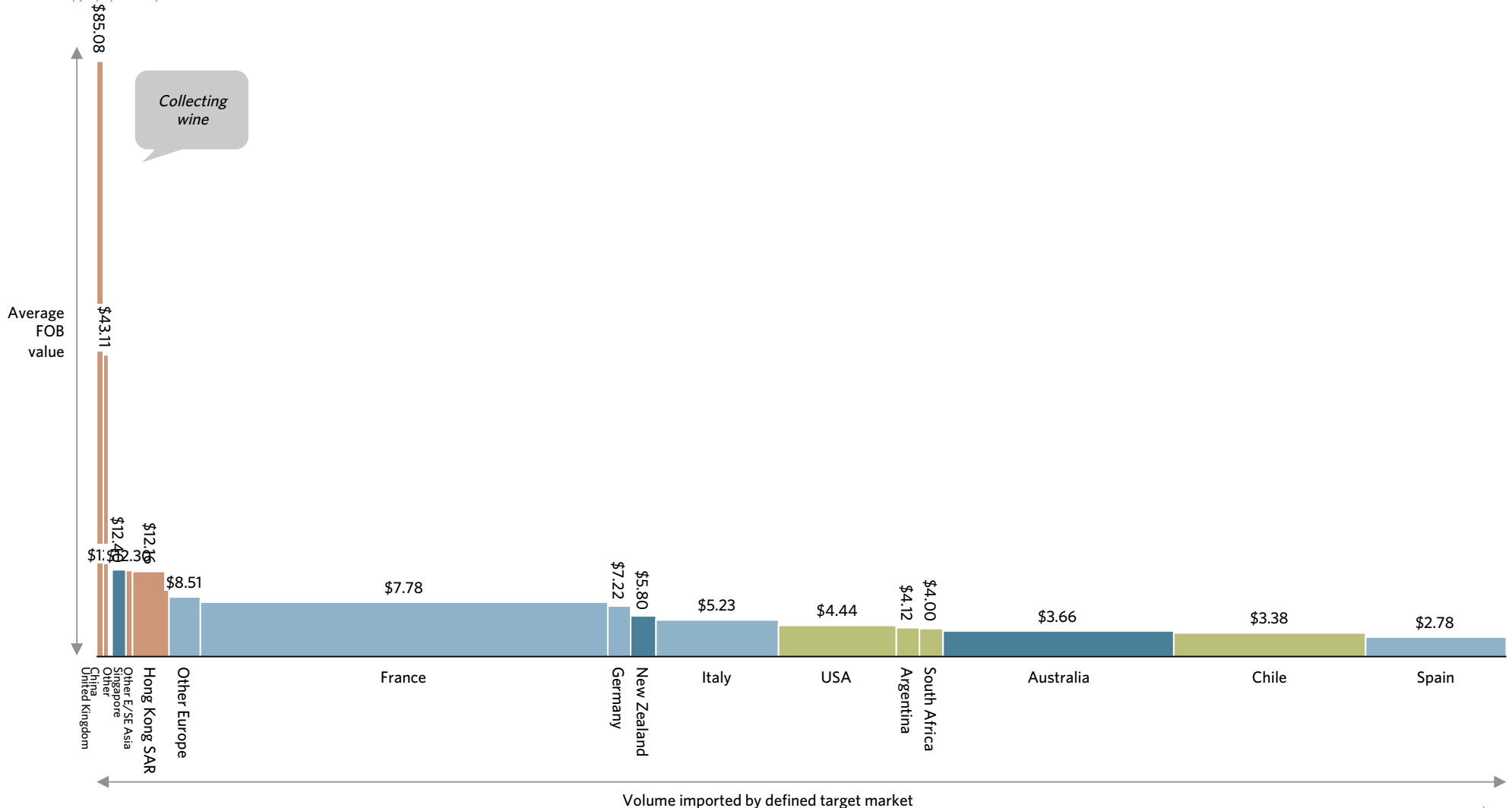


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

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

AVERAGE EXPORT VALUE COST CURVE BY SUPPLIER

US\$/l; FOB; 2014



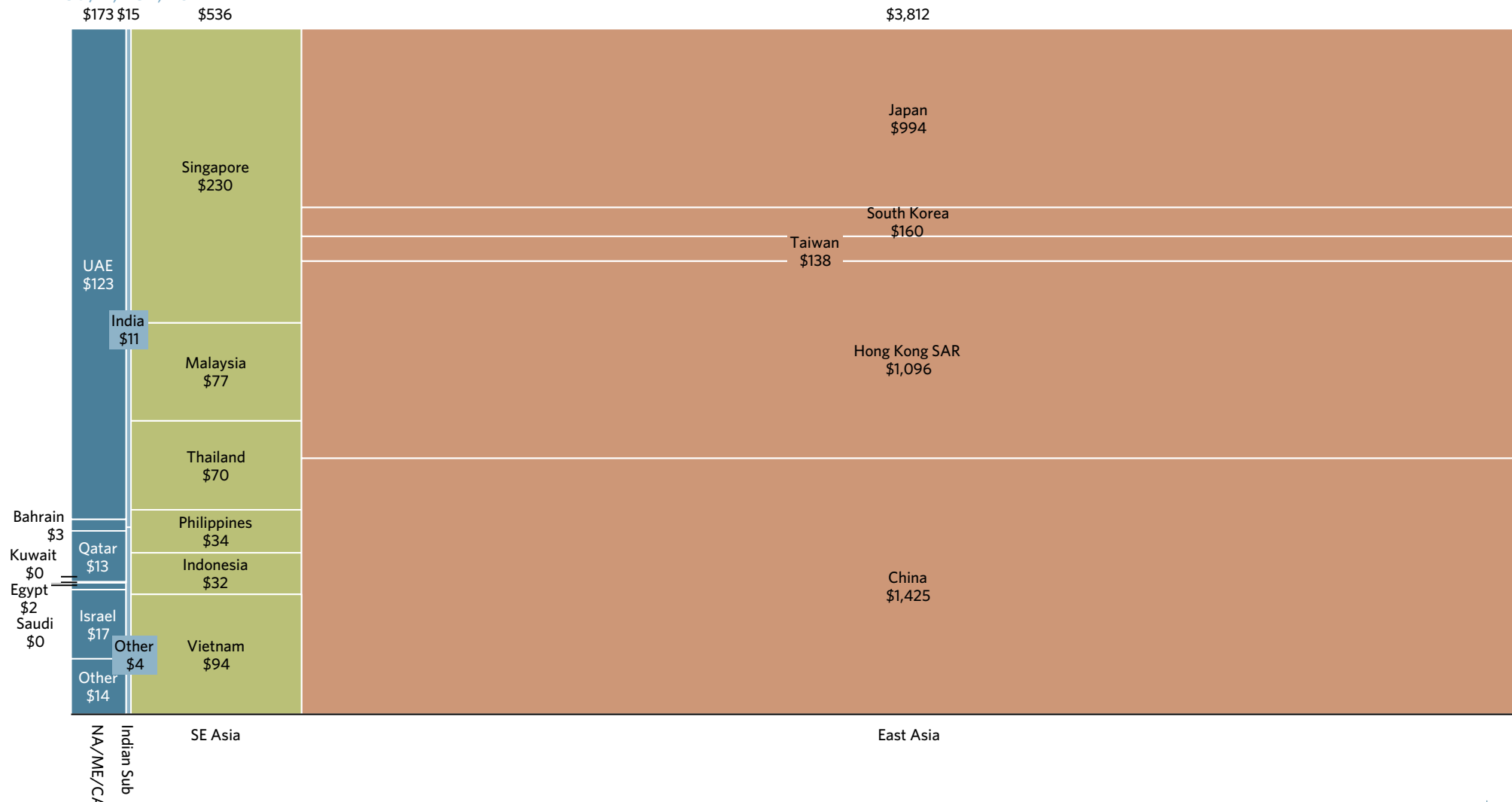
Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

East Asia dominates the Asian/Mid-East market for wine; China, Hong Kong and Japan stand out for size

IMPORT VALUE BY MARKET BY REGION

TOTAL = US\$4,536m

US\$m; FOB; 2014

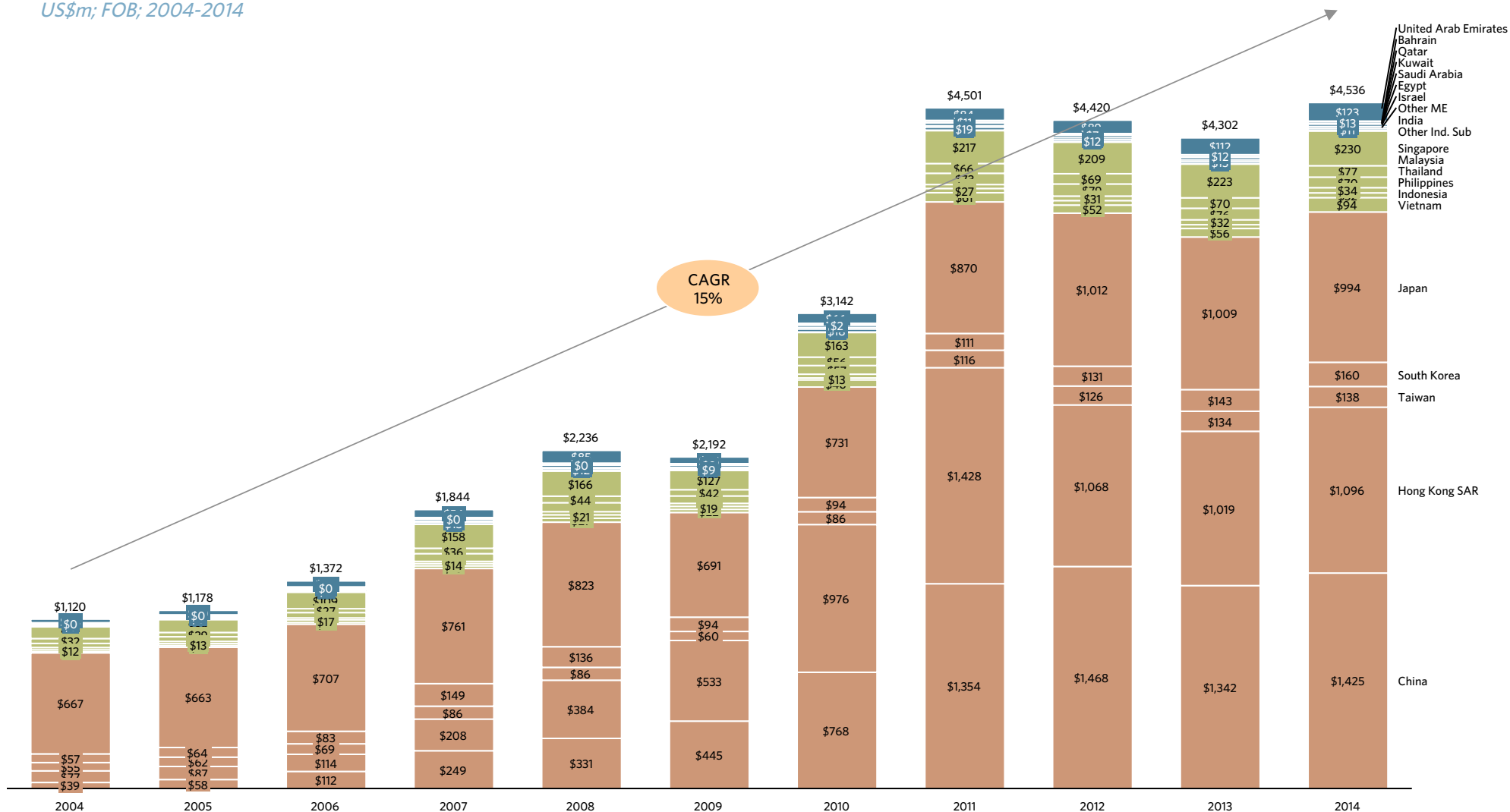


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

East Asia is driving growth in wine imports

IMPORT VALUE BY MARKET BY REGION

US\$m; FOB; 2004-2014

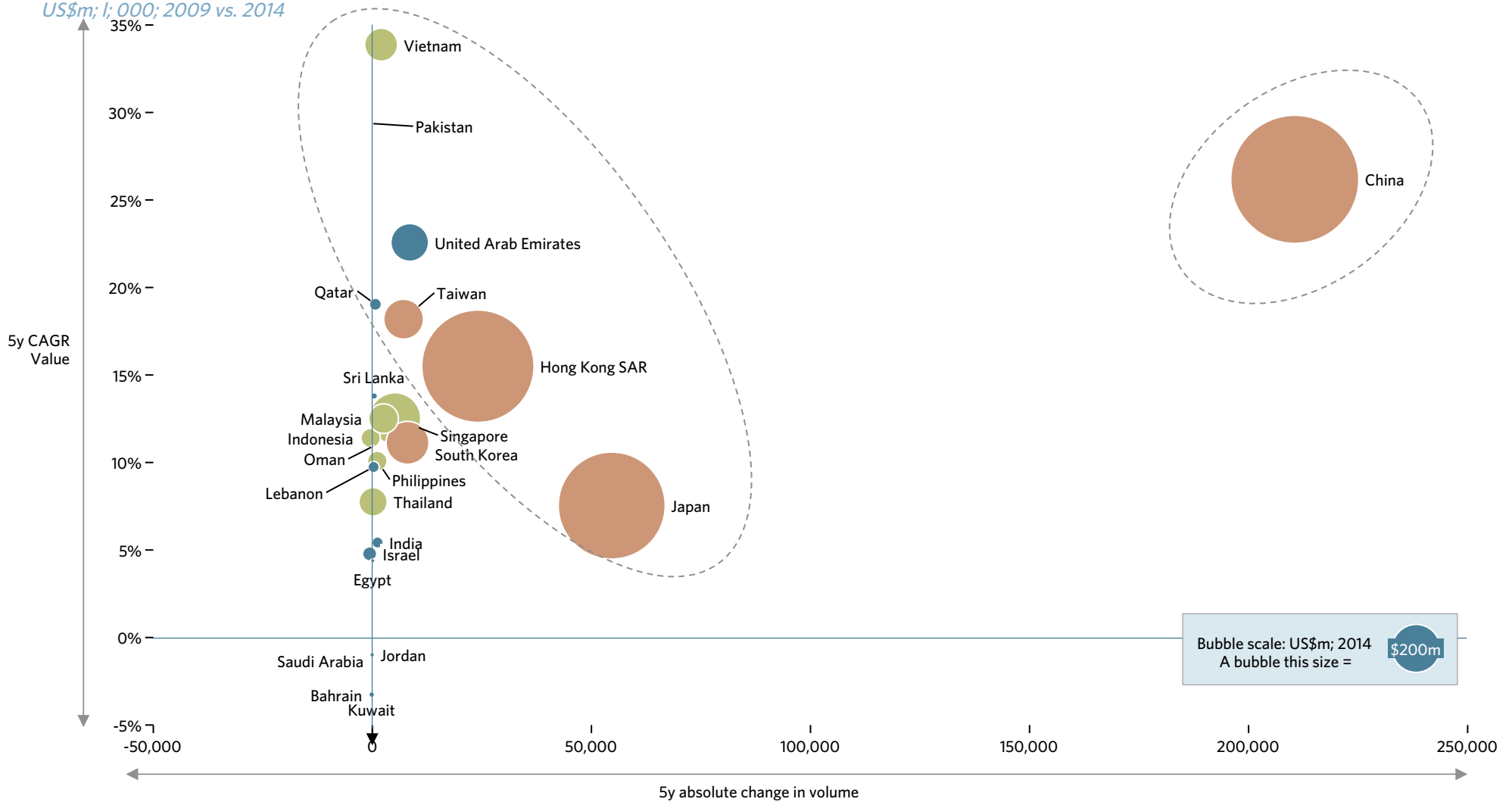


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

China stands out for growing volume and value

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

US\$m; 1,000; 2009 vs. 2014

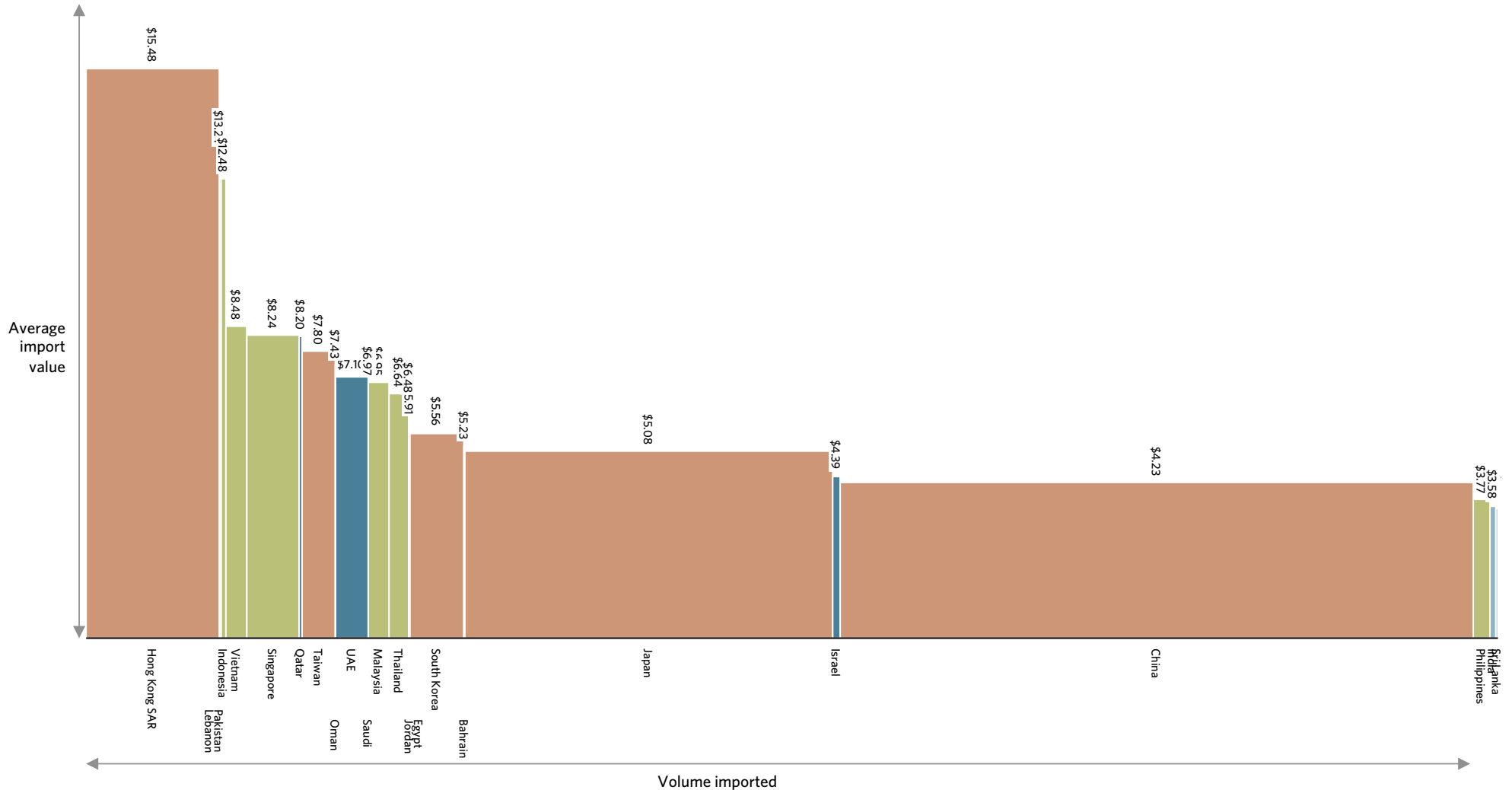


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Average wine import prices vary by country, with Hong Kong standing out as a large market paying premium prices

AVERAGE IMPORT VALUE COST CURVE BY MARKET/REGION

US\$/l; FOB; 2014

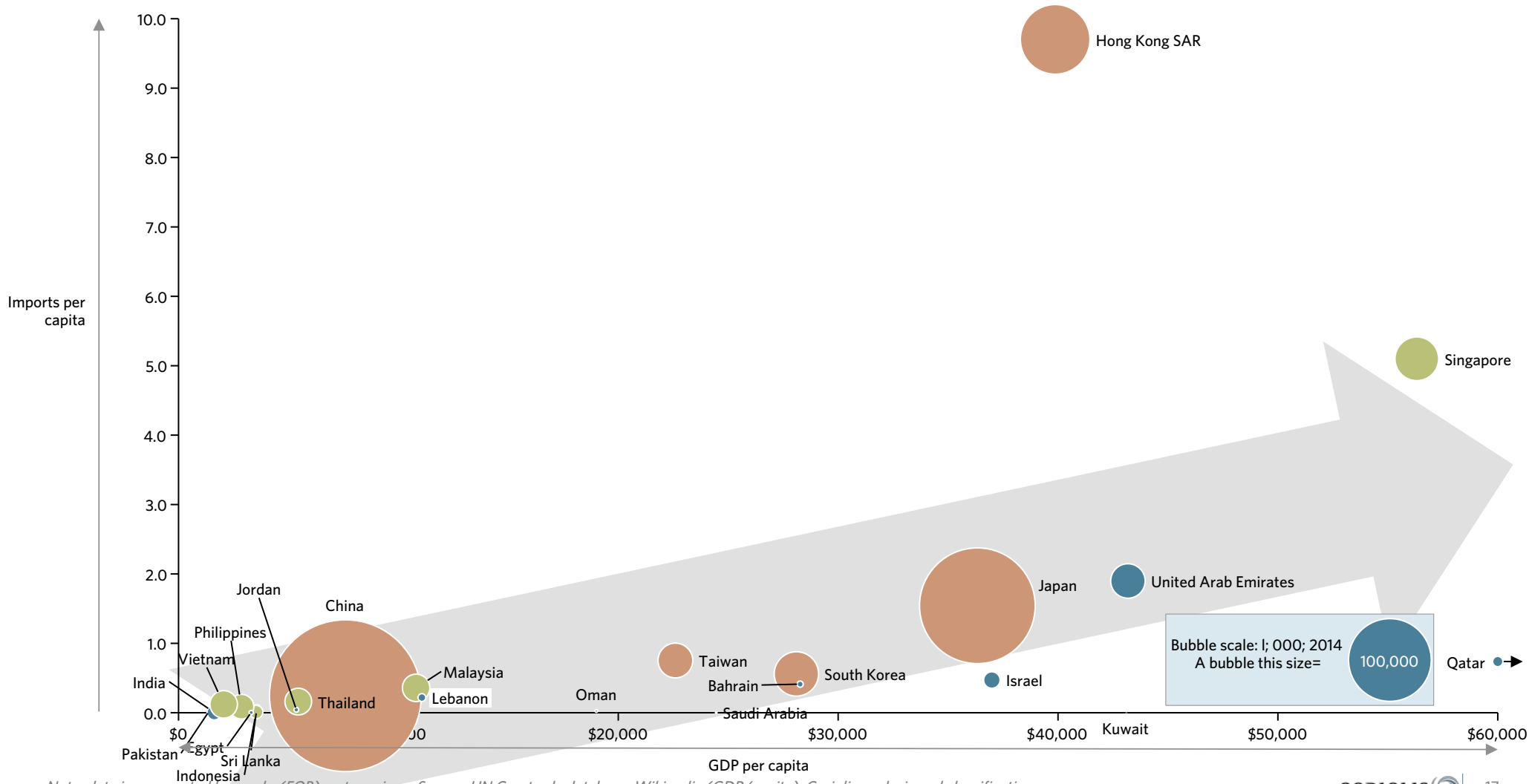


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Imported wine consumption and aggregate wine 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

L; US\$; I; 000; 2014

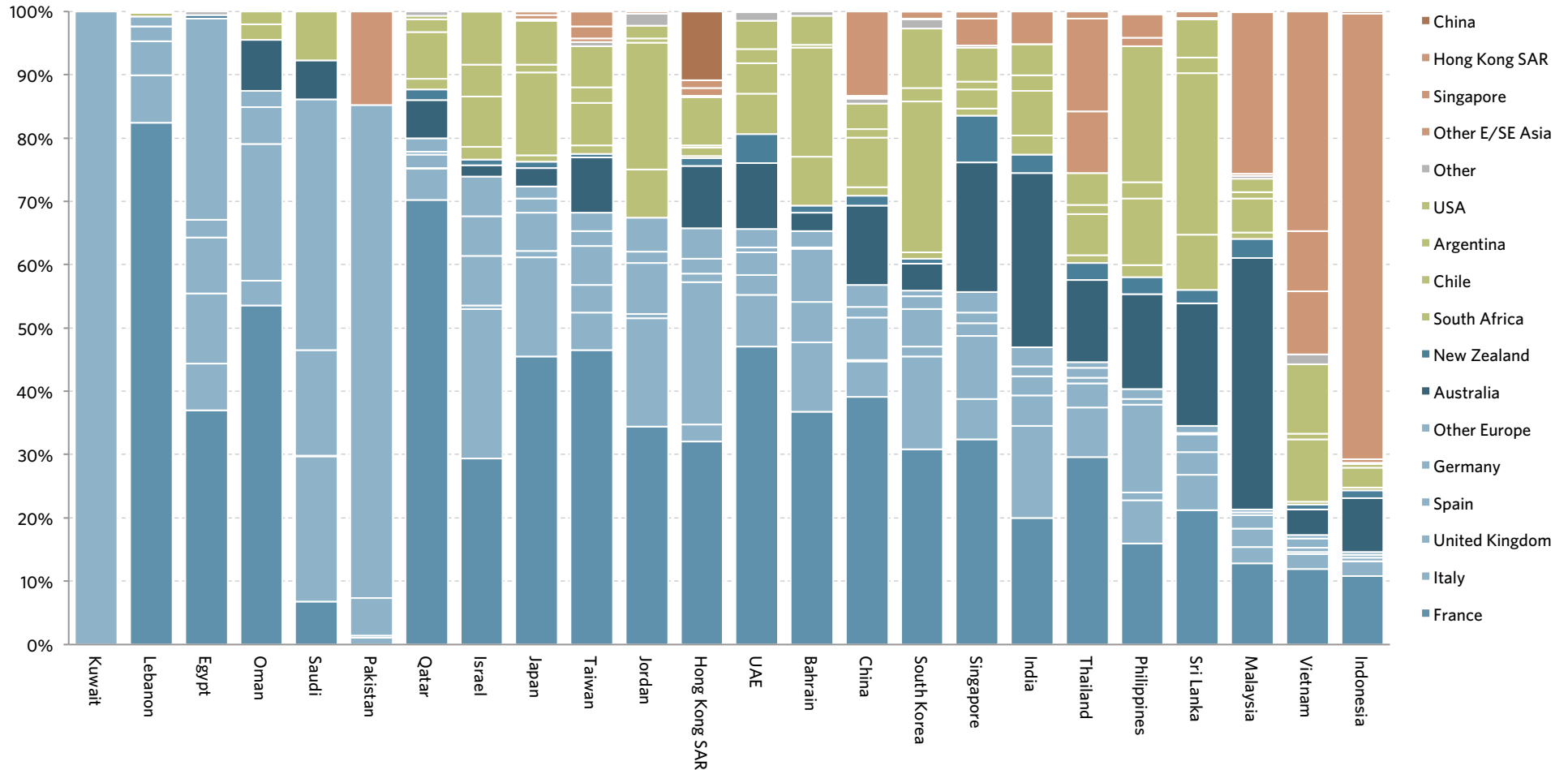


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Wikipedia (GDP/capita); Coriolis analysis and classifications

Market share varies by country; European countries stronger in Middle East than E/SE Asia; New World has strength across East and South East Asia

IMPORT VALUE MARKET SHARE BY MARKET BY KEY SUPPLIER

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

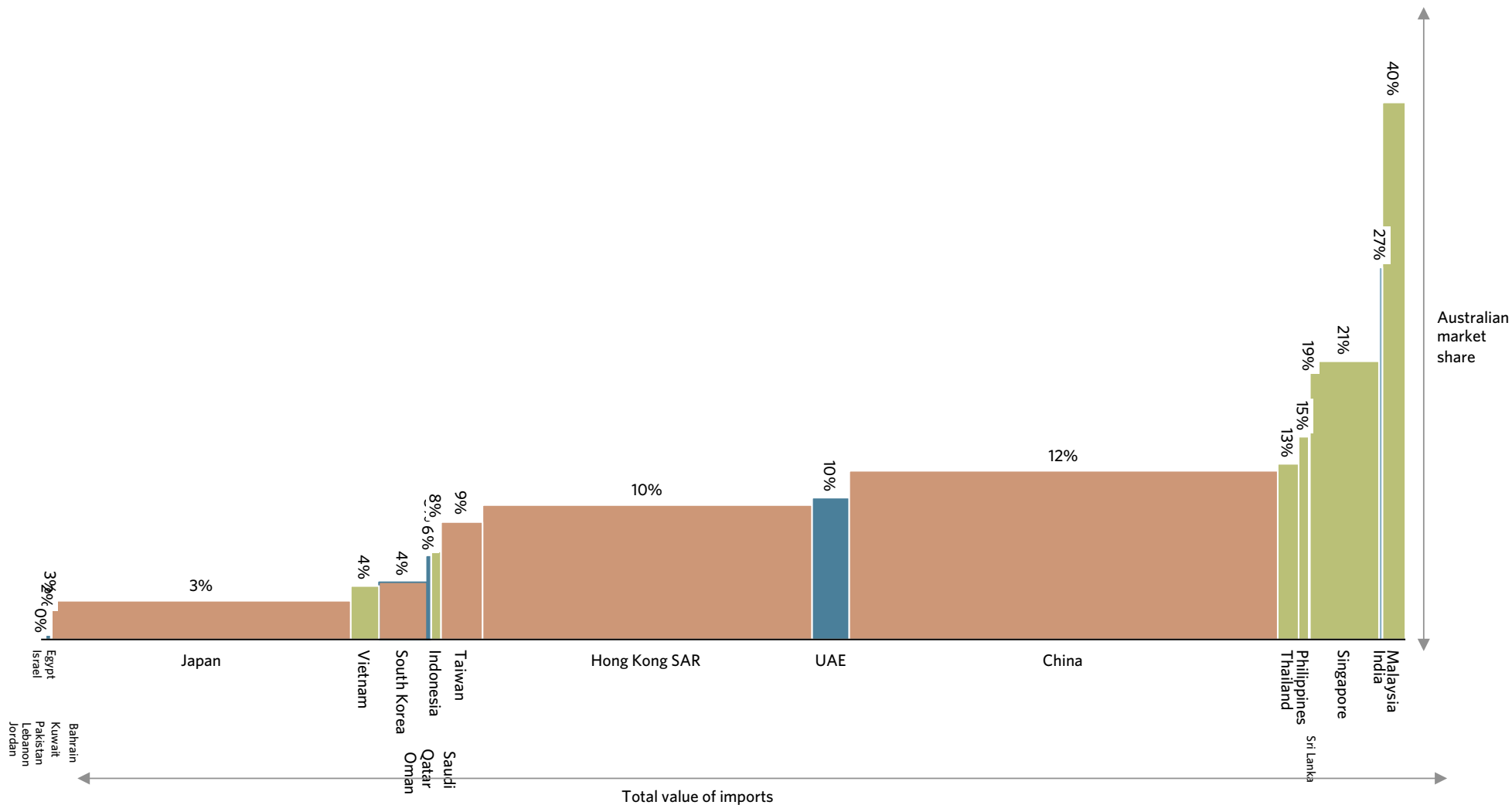


Note: data is as reported by sender(FOB), not receiver; Source: UN Comtrade database; Coriolis analysis and classifications

Western Australia has opportunities for wine export growth in select Asian markets; SE Asia stands out as a region that pays good prices (page earlier) and where Australia already has a strong position

AUSTRALIAN IMPORT VALUE MARKET VS. MARKET VALUE

US\$m; FOB; 2014

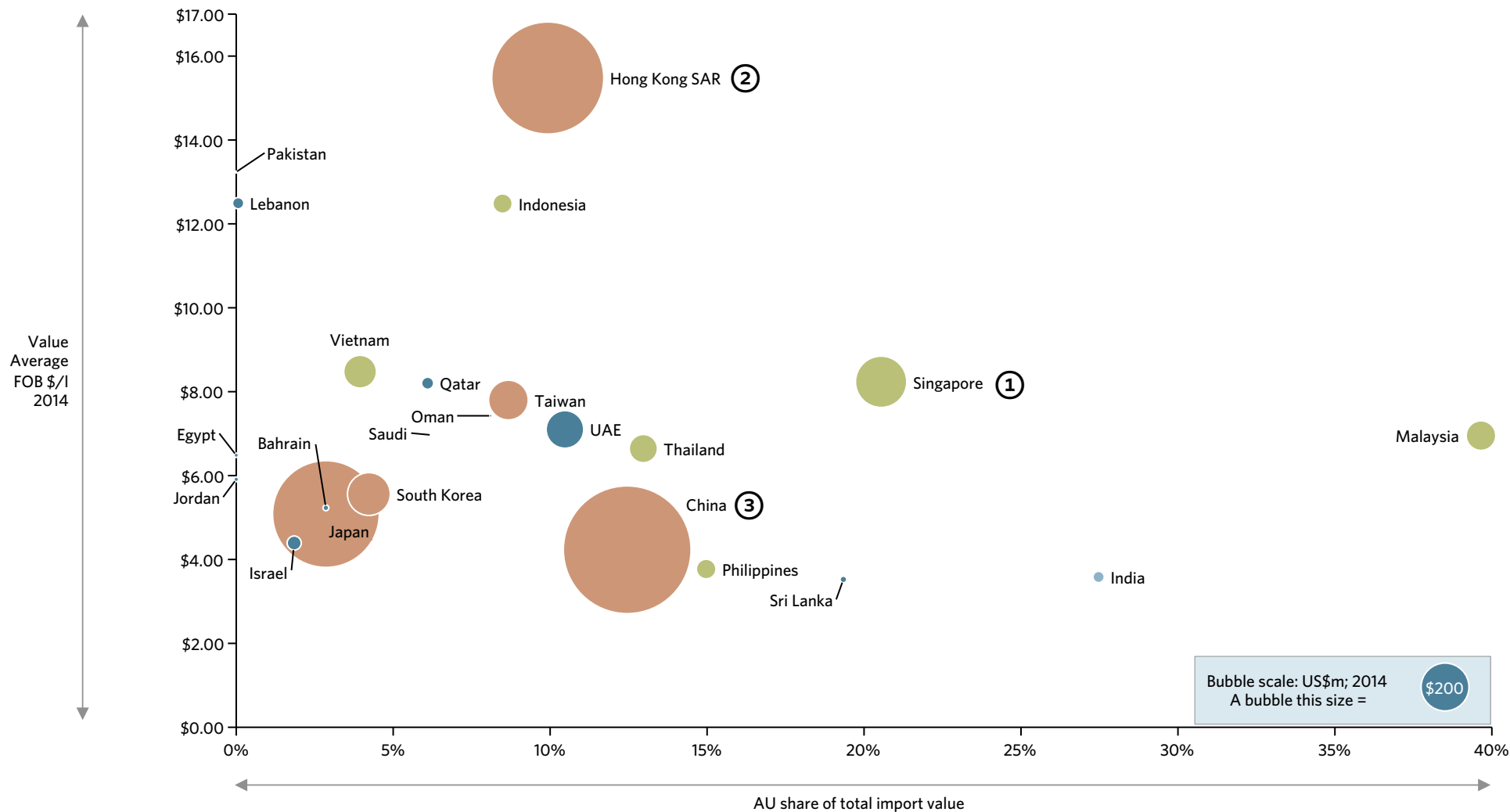


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Data supports new high value, premium wine opportunities being initially launched in (1) Singapore, (2) Hong Kong and (3) China

WHERE TO FOCUS FOR NEW HIGH VALUE, PREMIUM PRODUCTS: AU SHARE VS. AVERAGE VALUE VS. MARKET SIZE

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



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

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

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

Model; 2016

THOUGHT STARTER
"STRAW MAN" MODEL
FOR DISCUSSION



DOCUMENT STRUCTURE

What is the strategic situation in the market?

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



Western Australia is well-positioned to grow wine exports to Asia

IS THE MARKET DEVELOPED & COMPETITIVE?

- The flow of wine from the farm through to the consumer is relatively straight forward and simple
- Wine prices vary across different markets; prestigious brands can command premium
- Asian markets have a much less developed WA wine range and offer than Western countries
- “Leading indicator” Western markets strongly suggest depth of range in Asian wine markets will increase going forward
- All markets have a greater range of red wines than white wines; up to double the amount in larger markets
- WA’s varieties of strength (Chardonnay & Cabernet Sauvignon) are present in both Western and Asian markets

WHAT IS WA CAPABLE OF DELIVERING?

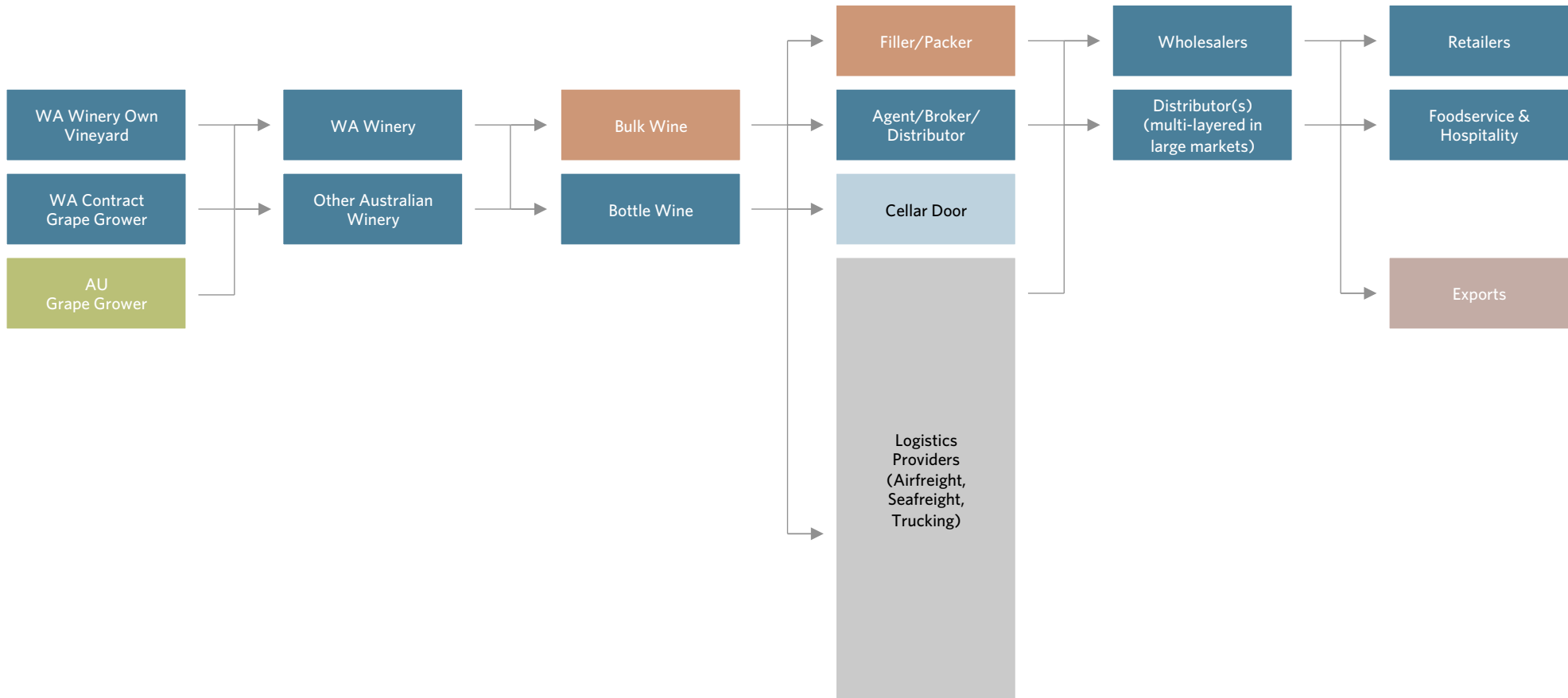
- Western Australian wine producers need to continue to move forward and improve through improved branding
- Multiple potential positions exist to develop a premium wine offer for Asia
- Products from other processors in other markets demonstrate what is possible in terms of developing a premium Western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

HOW IS THE MARKET STRUCTURED?

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

SIMPLIFIED MODEL OF SUPPLY CHAIN: WINE

Model; 2016

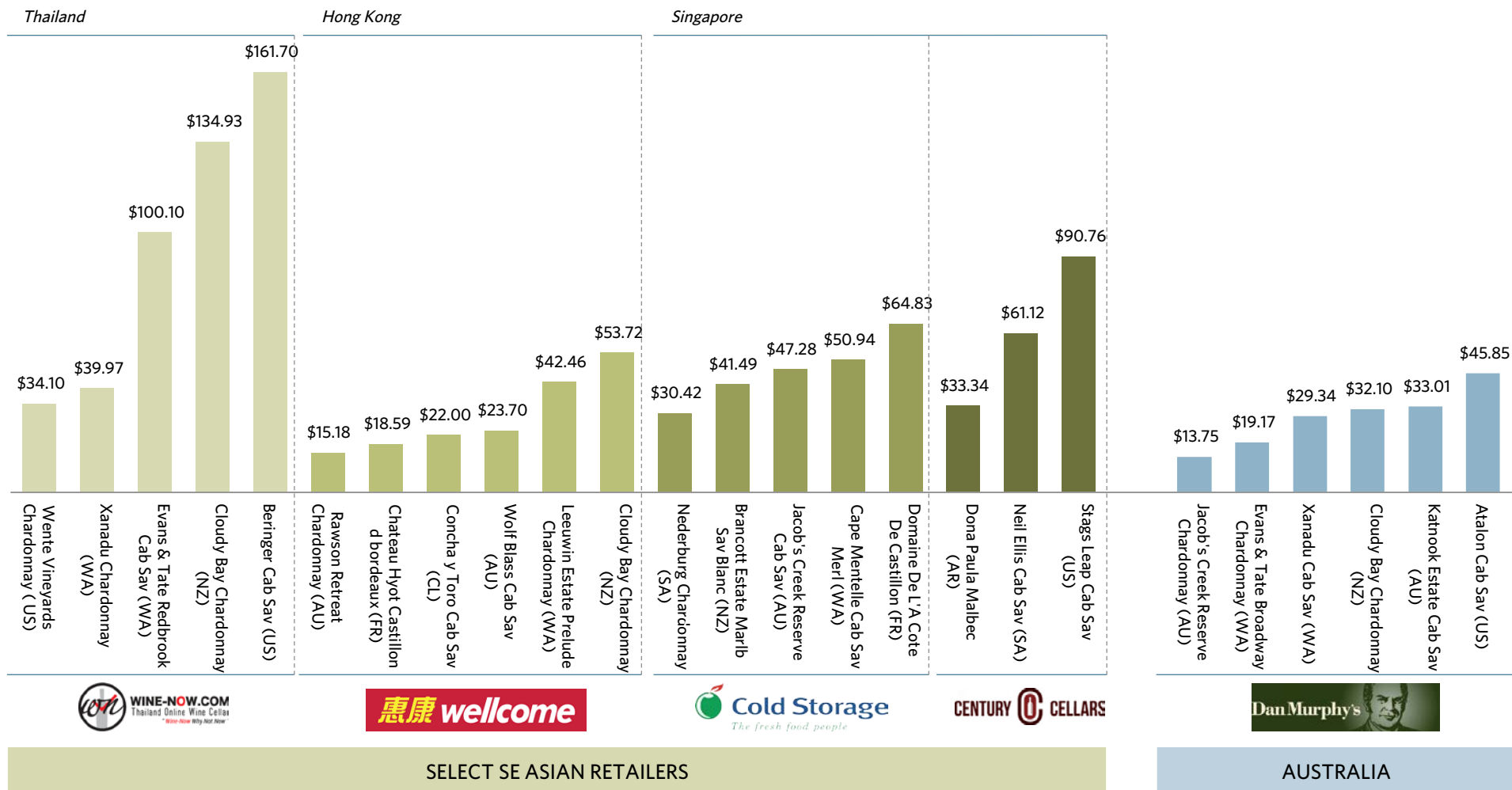


WHO IS THE COMPETITION? PRICING

Wine prices vary across different markets; prestigious brands can command premium

SHELF PRICE PER LITRE ACROSS SELECT SE ASIAN MARKETS AND AUSTRALIA: WINE

US\$/l; Jan 2016



Source: Coriolis from store checks

WHAT IS ON THE SHELF? RANGE IN MARKET

Asian markets have a much less developed WA wine range and offer than Western countries

EXAMPLE: ACTUAL WA WINE RANGE ON SHELF

Jan 2016



London: GDP/Capita US\$75,200



Singapore: GDP/Capita US\$83,100

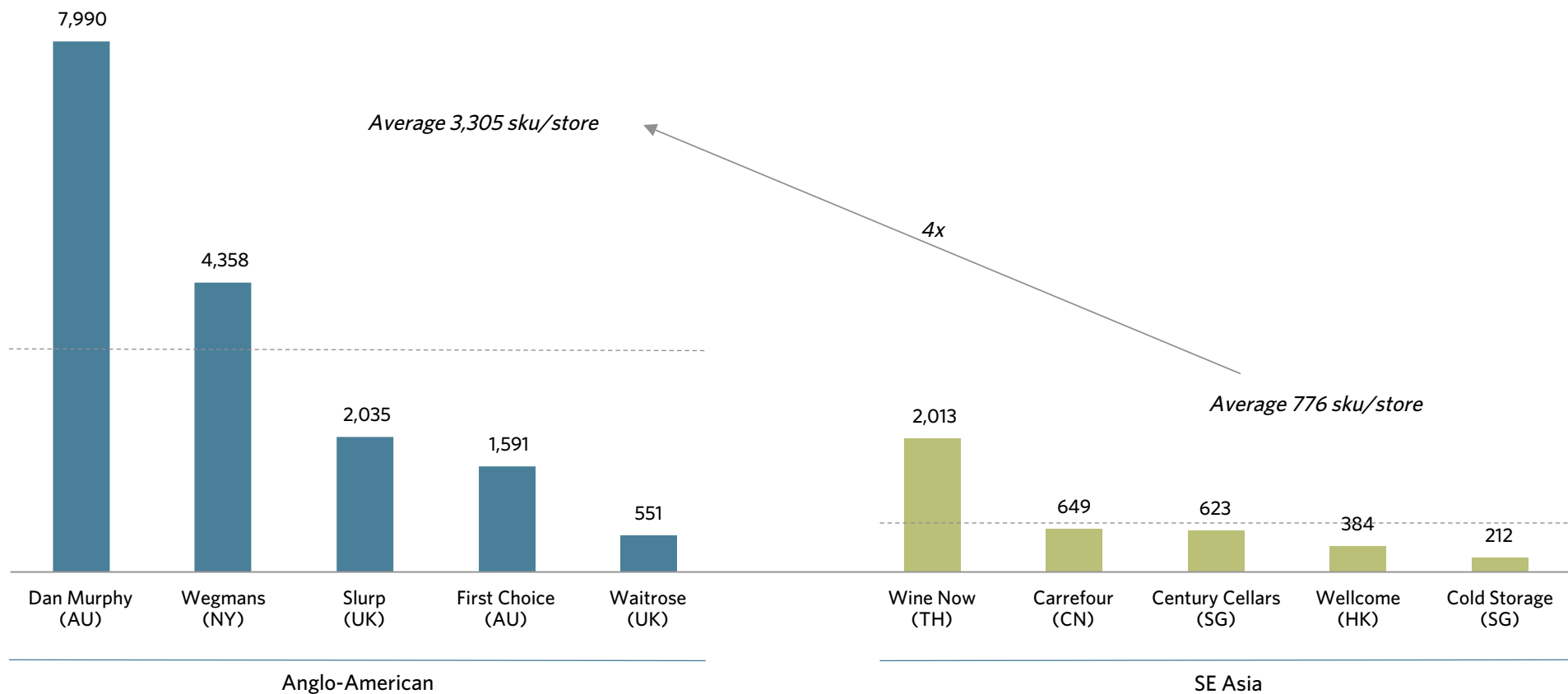


IS THE MARKET DEVELOPED & COMPETITIVE? RANGE

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

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

SKU; actual; Jan 2016

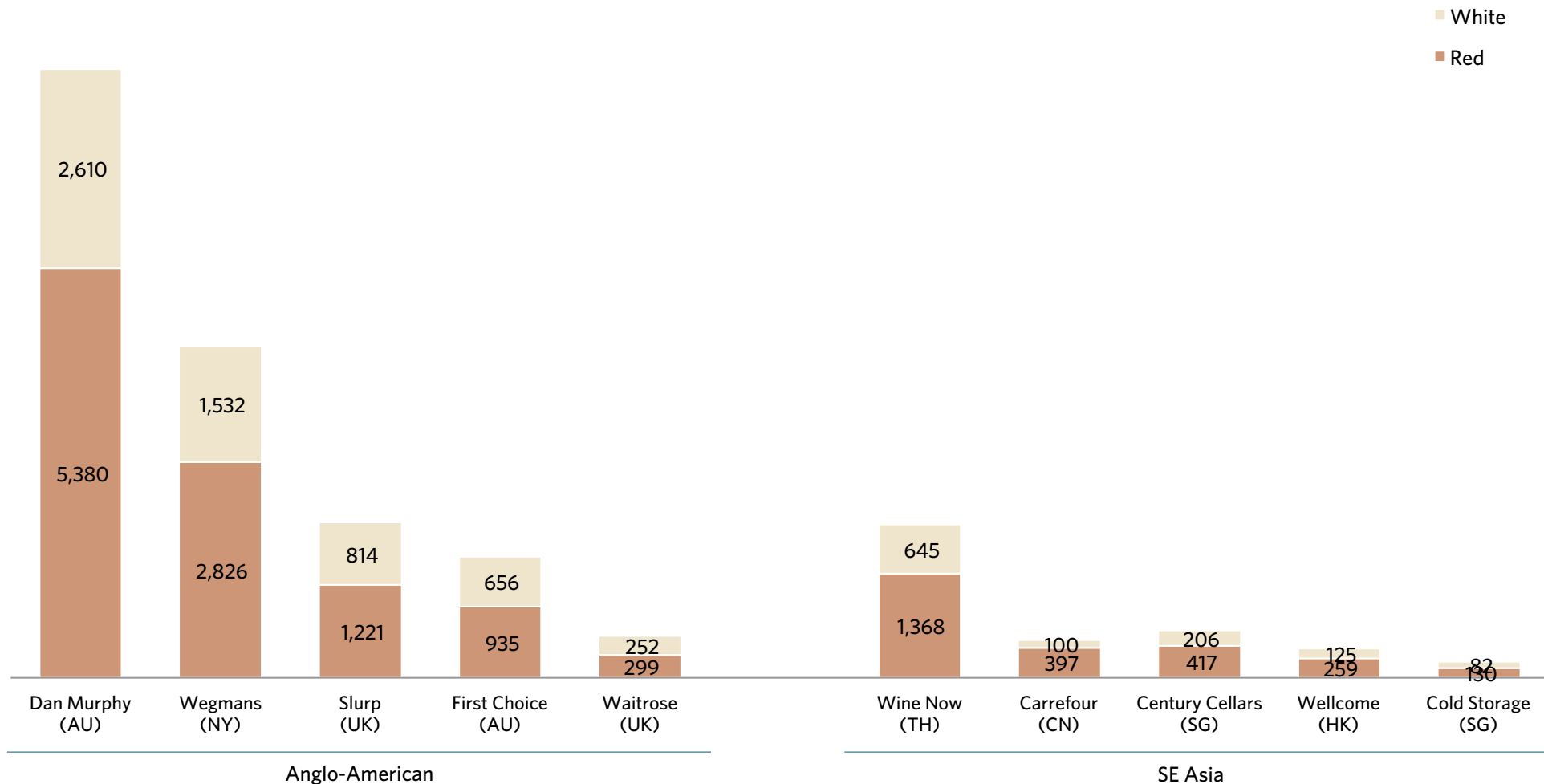


IS THE MARKET DEVELOPED & COMPETITIVE? SEGMENTATION

All markets have a greater range of red wines than white wines; up to double the amount in larger markets

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

SKU; actual; Jan 2016



Source: Coriolis from store checks

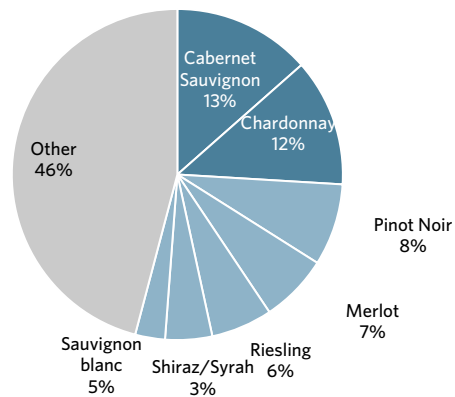
IS THE MARKET DEVELOPED & COMPETITIVE? SEGMENTATION

WA's varieties of strength (Chardonnay & Cabernet Sauvignon) are present in both Western and Asian markets

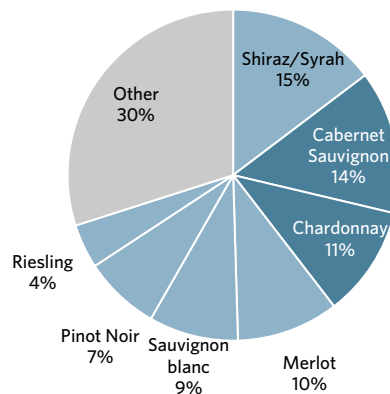
MARKET SHARE BY VARIETY: SELECT RETAILERS FROM ACROSS MULTIPLE MARKETS

% of SKU; actual; Feb 2016

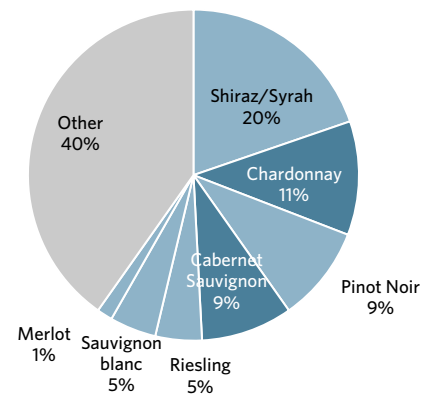
Wegmans (NY)



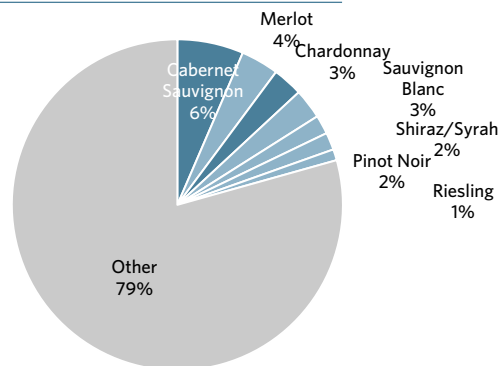
Slurp (UK)



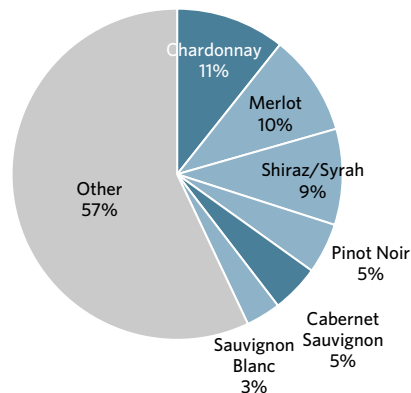
Dan Murphy's (AU)



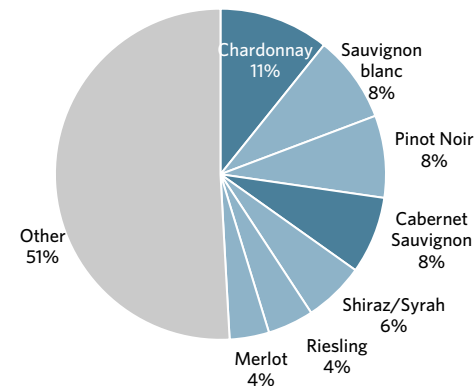
Carrefour (CN)



Wellcome (HK)



Century Cellars (SG)



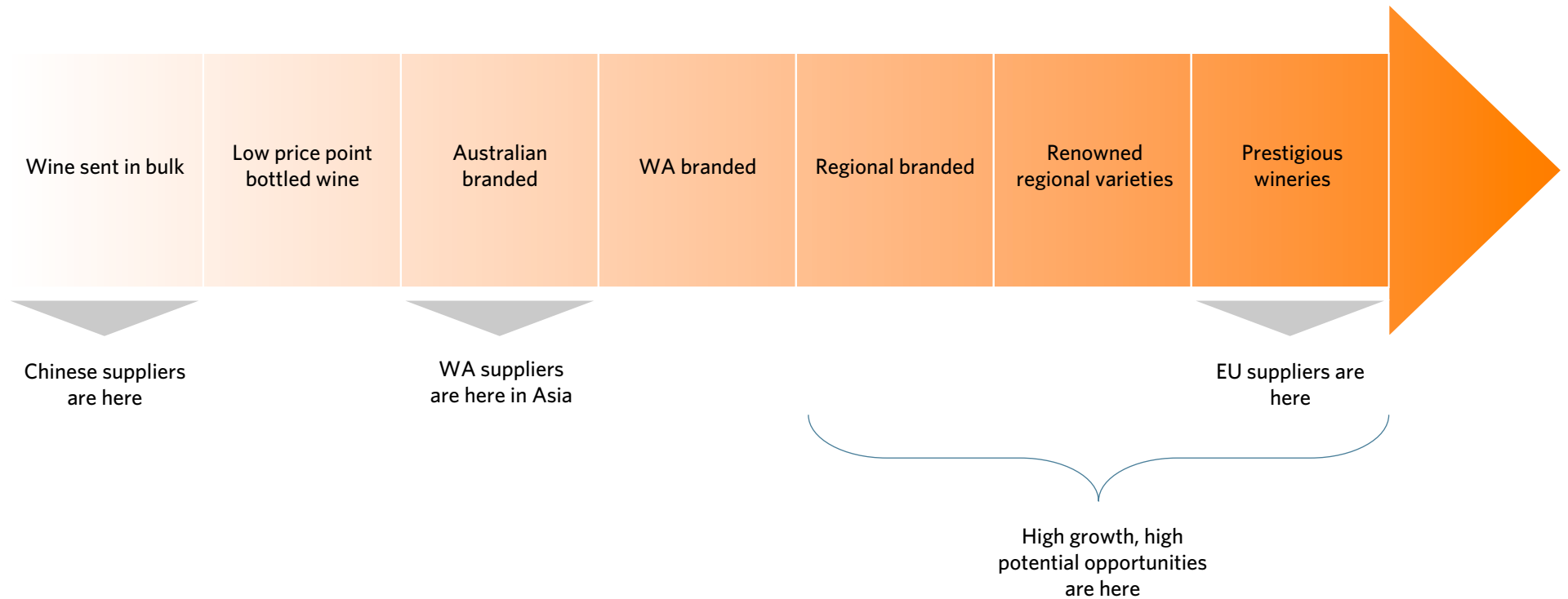
Source: Coriolis from store checks

WHAT IS WA CAPABLE OF DELIVERING? STRATEGIC DIRECTION

Western Australian wine producers need to continue to move forward and improve through improved branding

SUGGESTED STRATEGIC DIRECTION: WESTERN AUSTRALIAN WINE

Model; 2016



WHAT IS WA CAPABLE OF DELIVERING? CLAIMS

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

NEED TO GET PHOTO PERMISSION
ON SOUTHERN FOREST IMAGE

IDENTIFIED POTENTIAL PREMIUM POSITIONS

Model; 2016



- High in antioxidants
- Reduces heart attack risk
- Promotes longevity
- Lowers risk of heart disease
- Lowers risk of stroke
- Cuts risk of cataracts
- Slows brain decline
- Lowers stress

- Identified source region
- Organic
- Specialty variety
- Track & trace
- Winemaker's story

- Gift packaging
- Limited edition
- Winery tour tie in
- Prestigious winery

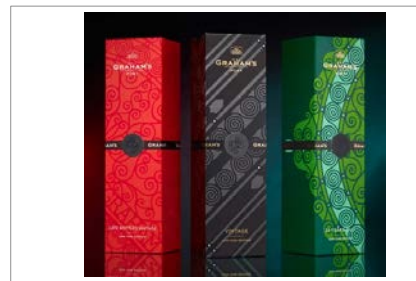
- Picnic size
- Tasting notes
- QR code
- Food pairing suggestions
- Home delivery service

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 wine offer

EXAMPLES OF PREMIUM PRODUCTS FROM OTHER MARKETS

Select; 2016



Carrefour China

French Bordeaux Gift Box

750ml x 2

Passion for wine

Red colour

Able to choose contents

Gift box

Two wine glasses

Winery branding on box

Traditional look

Asia New Year Edition

Specially released

Red: prosperity & happiness

Green: harmony & balance

Black: power & balance

Inspired by 1890 gate at winery

Gift pack

Italian Red Blend

Attractive box

Wine knife etc included

Branded box

Magnum size

WHAT IS A POTENTIAL WA OFFER?

There are a wide range of potential product positions or claims available for a premium wine 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



High in antioxidants

Lowers stress

Promotes longevity



From Margaret River

Winemaker's story

Renowned regional variety



Gift packaging

Prestigious winery



Tasting notes on label

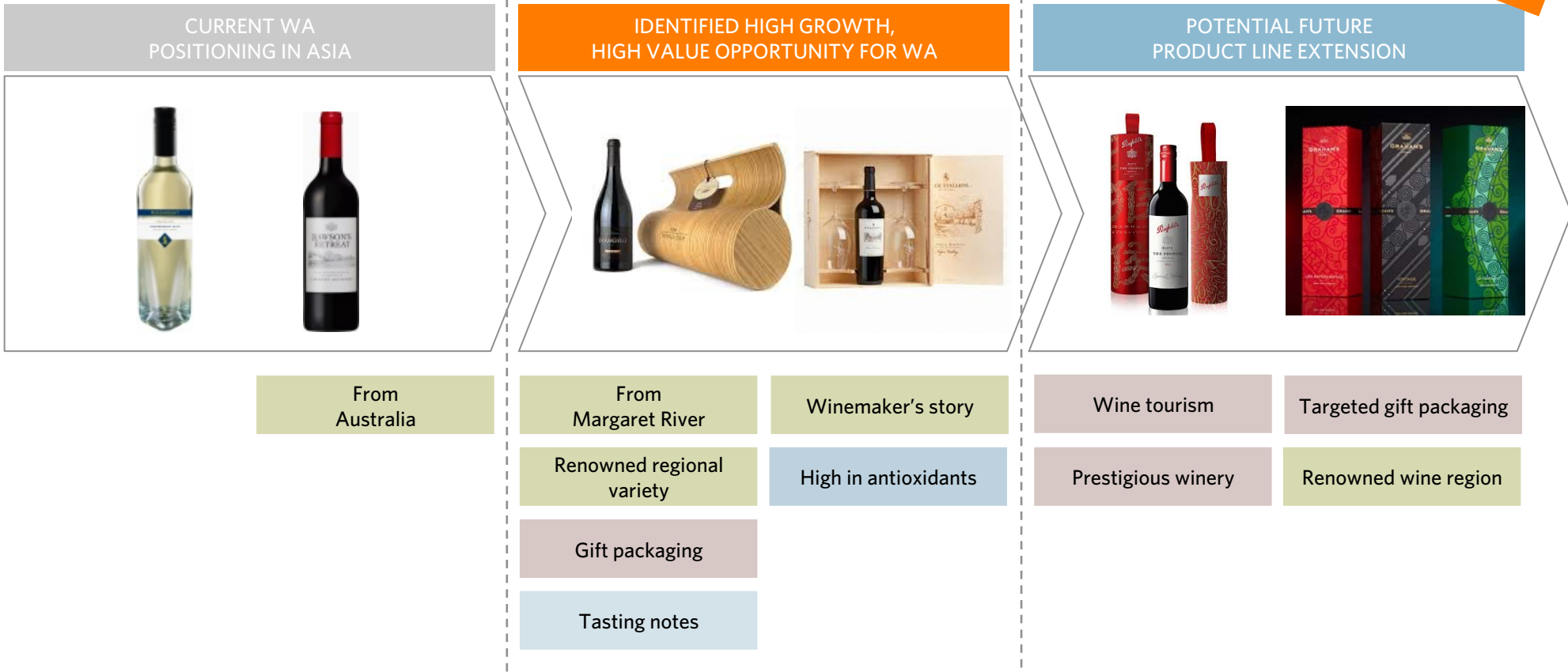
WHAT IS THE IDENTIFIED OPPORTUNITY?

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

PRELIMINARY "STRAWMAN" DEVELOPMENT & ROLLOUT PLAN FOR WINE OPPORTUNITY

Model; 2016

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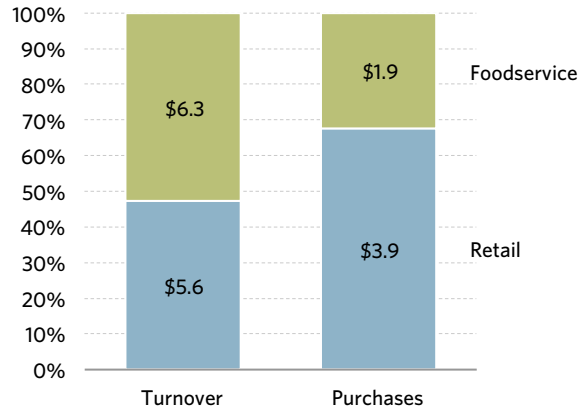


FOCUS MARKET - 1 - SINGAPORE

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

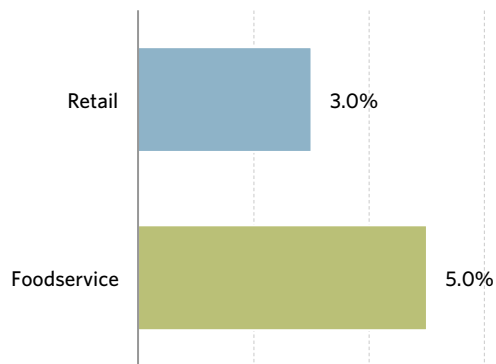
TURNOVER & PURCHASES

US\$b; 2014



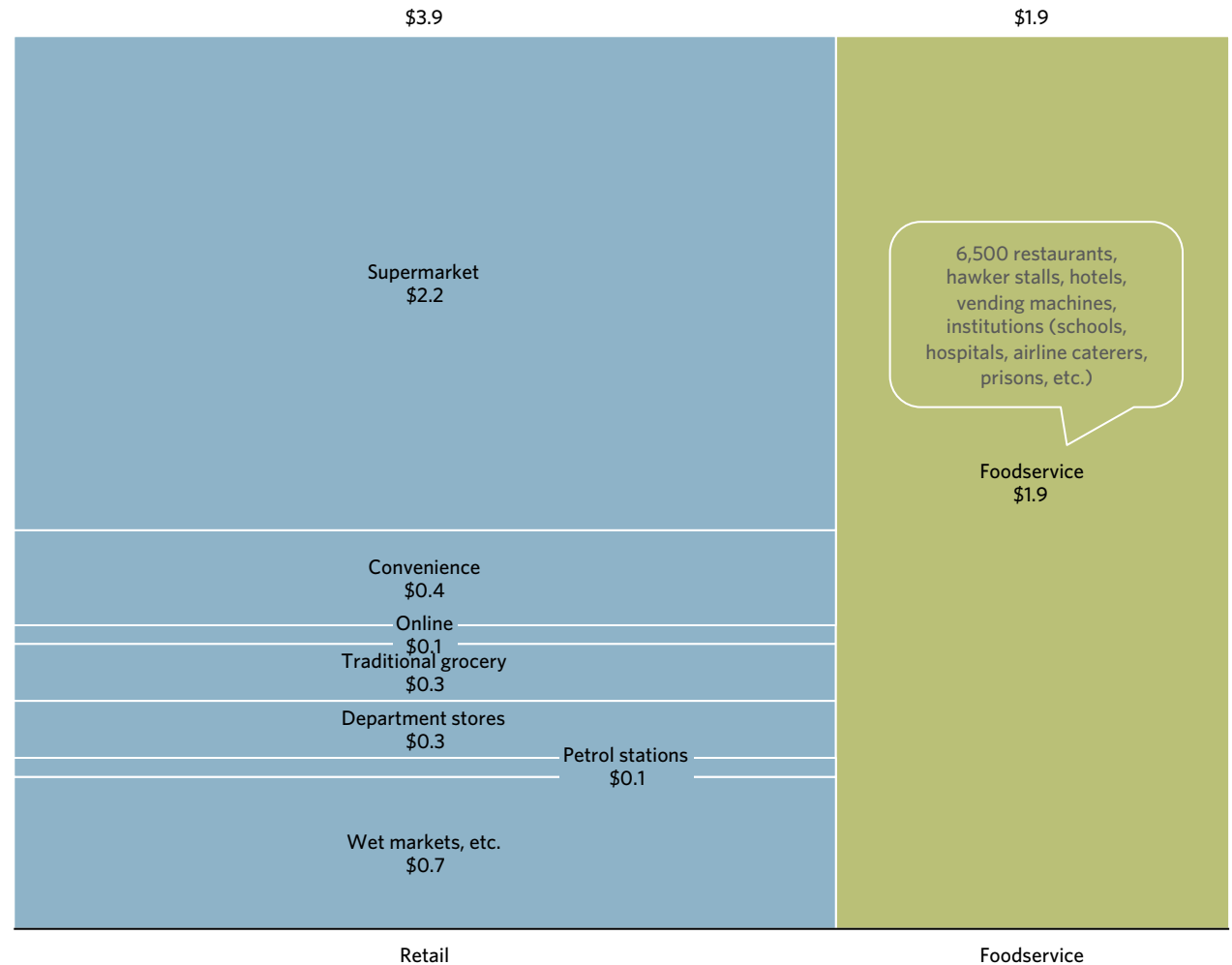
TURNOVER GROWTH RATE

% 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

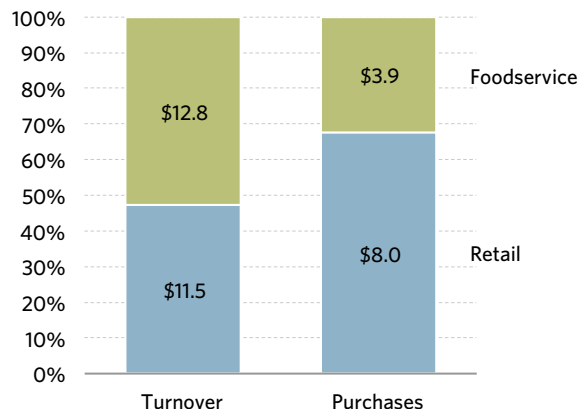
				
Firm	NTUC Fairprice	Cold Storage	Sheng Siong	Prime Supermarkets
Ownership	National Trade Union Council (Singapore)	Dairy Farm International (Hong Kong)	Listed; Singapore	Private; Singapore
Website	www.fairprice.com.sg www.ntuc.org.sg	www.coldstorage.com.sg www.dairyfarmgroup.com	www.shengsiong.com.sg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

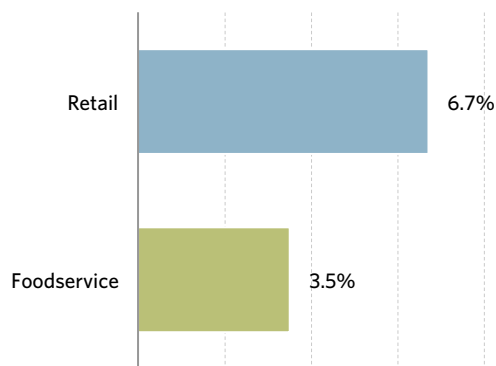
TURNOVER & PURCHASES

US\$b; 2014



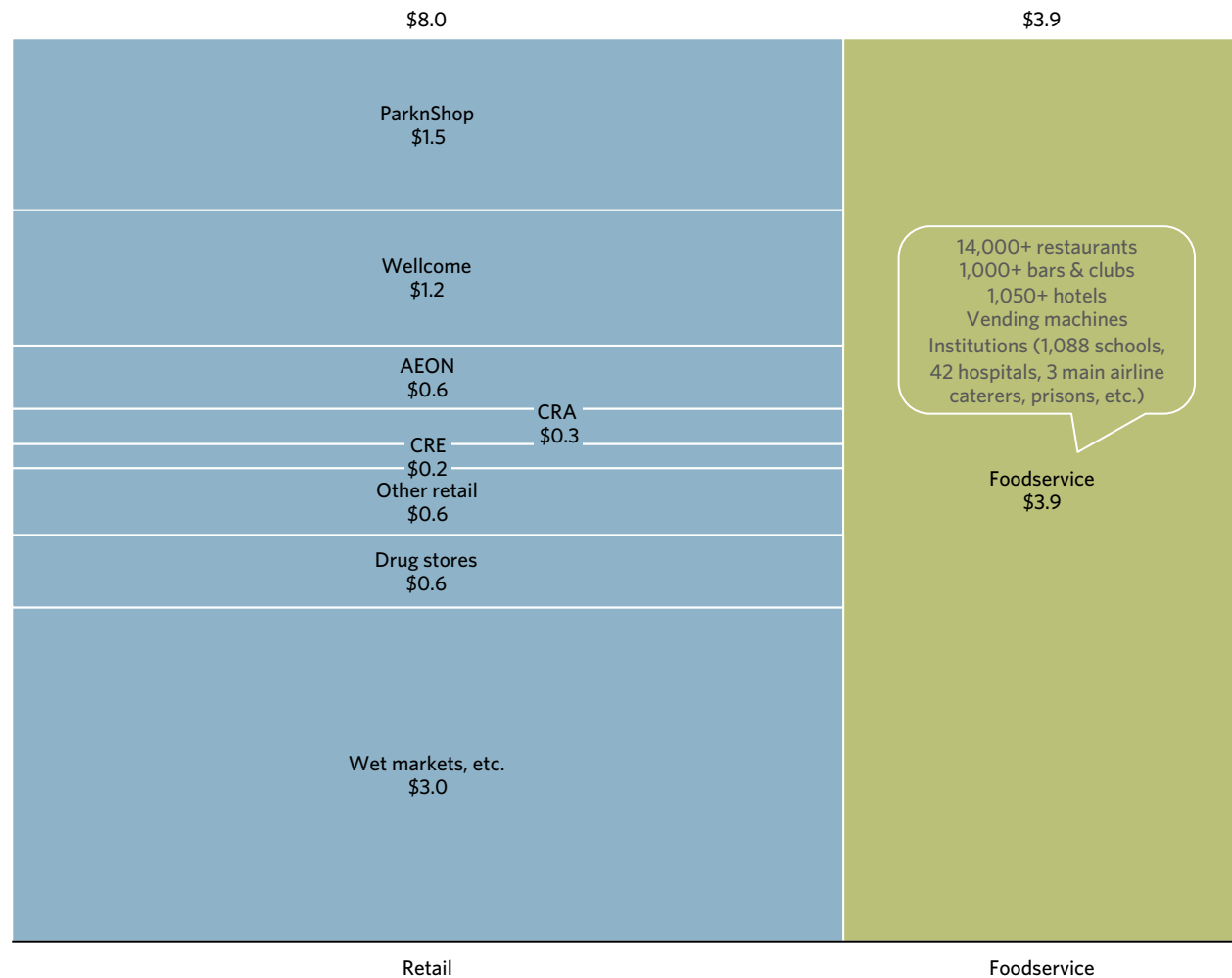
TURNOVER GROWTH RATE

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



ESTIMATED WHOLESALE FOOD & FMCG PURCHASES

US\$b; 2014



FOCUS MARKET - 2 - HONG KONG

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

POTENTIAL IN-MARKET PARTNERS - HONG KONG

2015 or as available

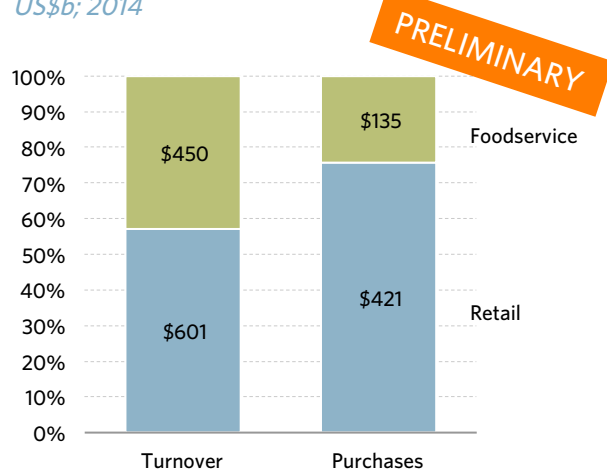
							
Firm	Wellcome	Park'N Shop	CR Vanguard	Dah Chong Hong	759 Stores	AEON Stores	Convenience Retail Asia
Ownership	Dairy Farm International/Jardine Matheson	A.S. Watson/Hutchison Whampoa	CRE/China Resources (SOE; China)	Dah Chong Hong/CITIC Pacific/CITIC (SOE; China)	Private; Hong Kong (Lam Wai Chun)	AEON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

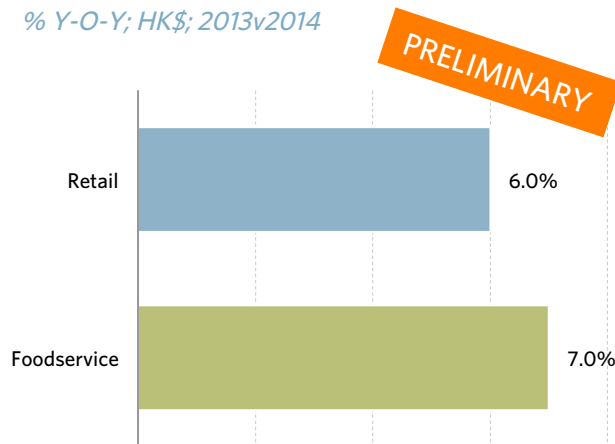
TURNOVER & PURCHASES

US\$b; 2014



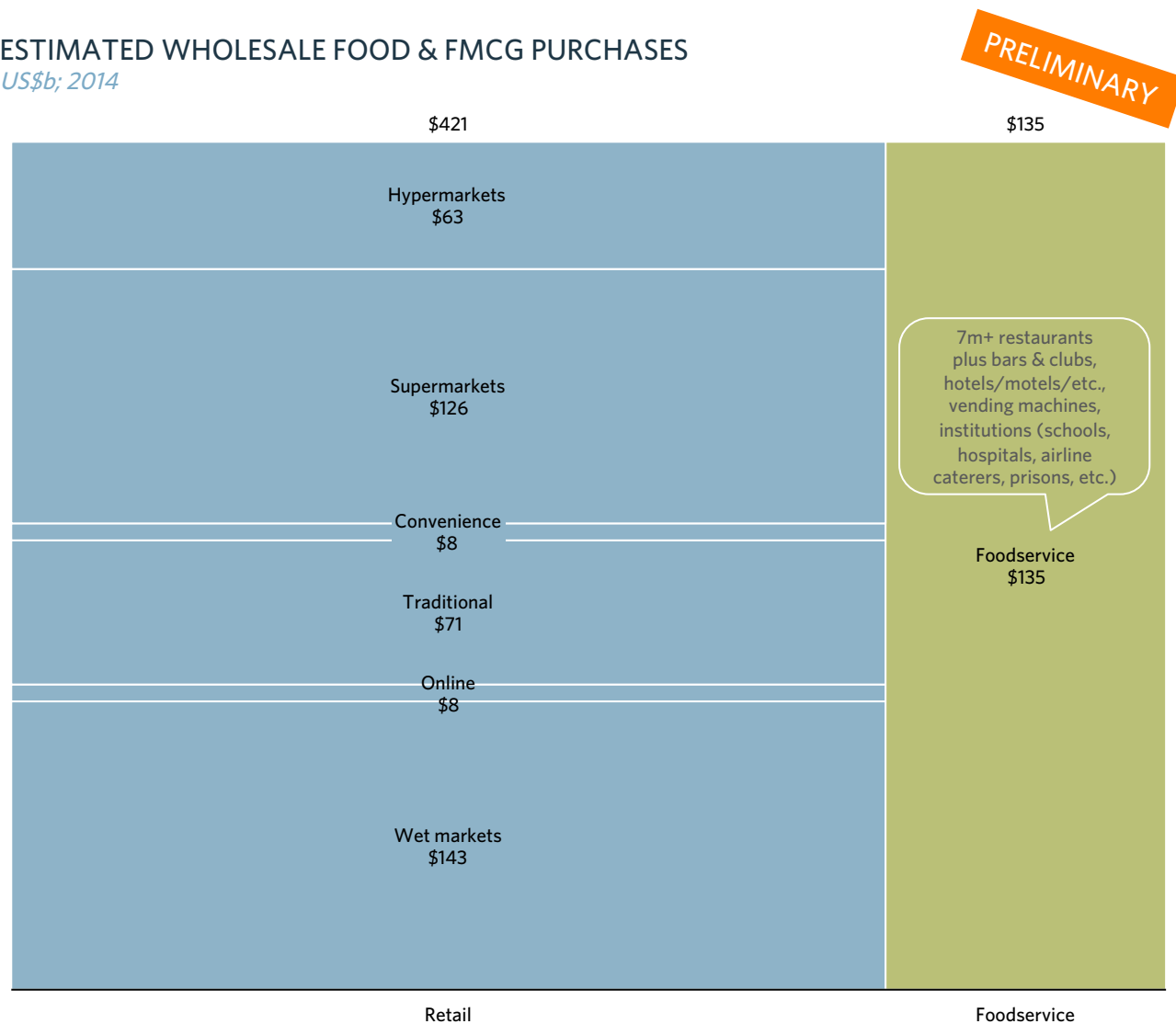
TURNOVER GROWTH RATE

% Y-O-Y; HK\$; 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

ACCOLADE WINES 	BURCH FAMILY WINES 	CAPE MENTELLE 
ADDRESS: 148 Dale Rd, Middle Swan, WA 6056	ADDRESS: 2 Birksgate Road, N Fremantle, WA 6159	ADDRESS: Wallcliffe Rd, Margaret River, WA 6285
PHONE: 08 9274 9522	PHONE: 08 9336 9600	PHONE: 08 9757 0888
WEBSITE: www.accolade-wines.com	WEBSITE: www.burchfamilywines.com.au	WEBSITE: www.estates-and-wines.com
FERNGROVE WINES 	FOGARTY WINE GROUP 	LEEUWIN ESTATE 
ADDRESS: 11/100 Mill Point Rd, South Perth, WA 6151	ADDRESS: Level 1, 5 Ord St, West Perth, WA 6005	ADDRESS: 18 High Street, Fremantle, WA 6160
PHONE: 08 9363 1300	PHONE: 08 9282 5499	PHONE: 08 9430 4099
WEBSITE: www.ferngrove.com.au	WEBSITE: www.fogartywines.com.au	WEBSITE: www.leeuwinestate.com.au
TREASURY WINE ESTATE 	VASSE FELIX 	VOYAGER ESTATE 
ADDRESS: 4/128 Main St, Osborne Park, WA 6017	ADDRESS: Caves Road, Margaret River, WA 6284	ADDRESS: 81 Stirling Hwy, Nedlands, WA 6009
PHONE: 08 9201 3908	PHONE: 08 9756 5000	PHONE: 08 9385 3133
WEBSITE: www.treasurywineestate.com	WEBSITE: www.vassefelix.com.au	WEBSITE: www.voyagerestate.com.au

IDENTIFIED WA COMPANIES

	Address
	5/28 Hammond Rd, Cockburn Central, WA 6164 08 9417 5633
	57 Labouchere Road, South Perth, WA 6151 08 9368 4555
	380 Mount Shadforth Rd, Denmark, WA 6333 08 9364 0400
	8 Gale Road, Metricup, WA 6280 08 9755 7200
	4323 Caves Rd, Wilyabrup, WA 6280 08 9755 5277
	3314 Caves Rd, Wilyabrup, WA 6282 08 9755 6323
	Metricup Roads Wilyabrup, WA 6280 08 9755 6244
	1564 S Coast Hwy, Denmark, WA 6333 08 9848 0000
	Frankland Rd, Frankland, WA 6396 08 9855 1544
	511 Harmans Mill Rd, Wilyabrup, WA 6280 08 9755 6046
	3193 Bussell Hwy, Cowaramup, WA 6284 08 9756 5656

	Address
	15 York St, Subiaco, WA 6008 08 9382 2379
	14591 Vasse Hwy, Eastbrook, WA 6260 08 9776 1251
	926 Metricup Road, Wilyabrup, WA 6280 08 9755 6266
	Lot 45 Albany Hwy, Mount Barker, WA 6324 08 9851 3111
	3210 W Swan Rd, Caversham WA 6055 08 9374 9374
	Darch Rd, Margaret River, WA 6285 08 9758 8633
	14923 Muir Hwy, Mount Barker, WA 6324 08 9892 1444
	Gardincourt Dr, Henty, WA 6236 08 9728 0055
	3948 Caves Rd, Wilyabrup, WA 6280 08 9755 6226
	Boodjidup Rd, Margaret River, WA 6285 08 9758 9500

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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.