



Advisers to Agribusiness

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Introducing the Agribusiness advisory services of Strategis Partners

Agribusiness faces a raft of complex and dynamic challenges today. Markets, technology and regulation are shifting. To succeed, agri-food companies must execute in the present and adapt to a changing future. Let us help you:

Prepare for a Volatile World

How can you make your enterprise and your supply chain more efficient, flexible, and sustainable? Are you ready to address strategic challenges in key markets and geographies?

Respond to Customer Trends

For citizen-consumers, food quality and safety is more critical than ever. What do changing customer preferences mean for your company? How should you respond to citizens' increased focus on nutrition, food safety, and sustainability?

Expand to New Markets

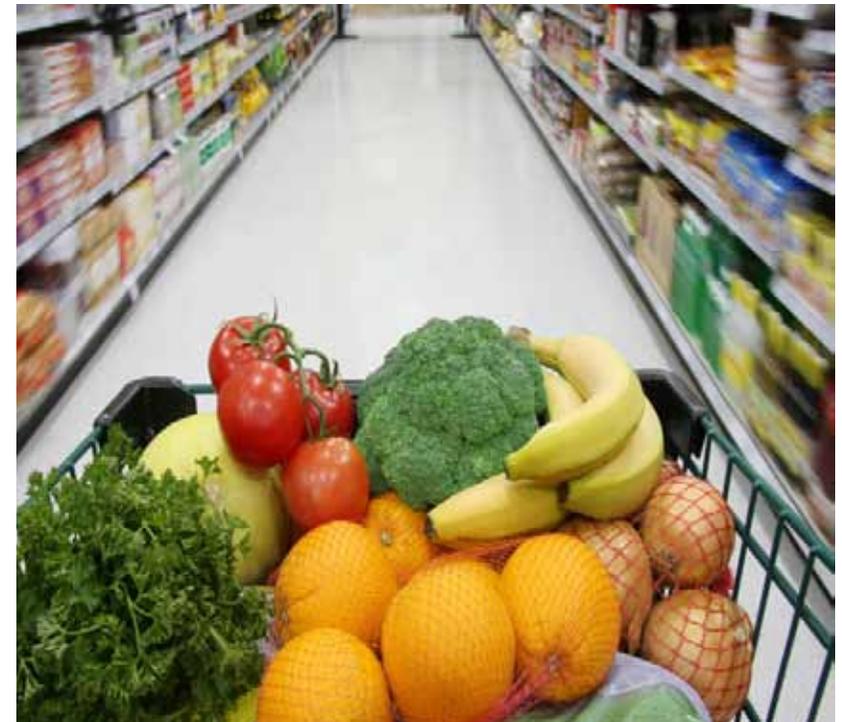
There are some fundamental forces shaping agriculture. Global demand is growing and becoming more diversified. Global production is expanding. How can your company create new options for tomorrow's growth in new markets and regions? How should you adapt your strategies, organisation, products, branding, and partnering approach for local markets?

Our Team

Strategis Partners is a team of advisers working with clients in Australia and Asia to solve their toughest and most urgent problems – delivering higher returns through better investment decisions, faster business growth, and superior customer value propositions.

Our clients are in agriculture, commodity processing and supply chain management, food and beverage manufacturing, retailing and distribution.

We serve commodity producers including dairy, fruit, cotton, grains and pulses, livestock, sugar, wheat and wool.



Case Studies

Fresh Opportunities - a sustainable dairy industry

A report to Wesfarmers Limited on building a sustainable dairy industry in Western Australia examined the strategic challenges to long term growth.

Five key actions were identified:

Convene a Government and Industry task force to drive expansion

Collaborate on processing and export market development

Re-engineer the “fresh” supply chain from WA to Asia

Boost productivity and innovation on-farm

Establish an integrated dairy export business

New Horizons for Grain Growers Association

The deregulation of Australia’s export wheat market in 2008 created new opportunities and numerous challenges. With our help Grain Growers Association identified the strategic priorities to add value to the grain-foods sector and undertake a transformational change program for the company.

This included:

Development of an industry services platform

Acquisition of three niche industry businesses providing services in grain food research, information technology , publishing and communications

Development of a strategic evaluation and investment framework for more effective deployment of capital across the group

Strategic Steps for SPC-Ardmona

It is a period of strategic change in Australia’s food manufacturing industry - renewed pressure on prices, reducing product life cycles and new consumer preferences. Across the processed foods value chain there are many challenges but also new opportunities.

Our team of advisers worked side-by-side with the management team to determine the path forward for SPC-Ardmona through:

Product innovation

Better tools to support sales and production decisions

Improved manufacturing processes

Advanced crop supply planning

Strategic growth off-shore.

Growing CCA Indonesia’s Supply Chain

In Indonesia, Coca Cola Amatil had a capacity challenge: How to meet increasing sales volumes in the fast growing Indonesian market?

With a network of over a dozen production and distribution facilities serving over 100 million consumers across the Indonesian archipelago, an integrated value chain view was needed.

CCA’s management used our supply chain optimization model to analyse the many network investment options available. Management was able to lift company value and meet the growth in the market – by finding the best supply options, plant locations, production and distribution patterns. The result was a saving of tens of millions of dollars, and a roadmap for the future growth of CCA Indonesia’s supply chain.





Helping agri-food companies chart their best course

Selected Client Engagements

- Scenario planning for international markets, new products, and agribusiness investment
- Capital expenditure planning for \$1 Billion retail distribution network
- Commodity supply chain review to identify the capacity constraints and opportunities for increasing throughput
- Contracting strategies for commodity supply
- Cotton processing and harvest planning study
- Food and beverage supply chain and distribution strategy in Australia, Japan and S.E. Asia
- Food services diversification strategy
- Fruit processing business review
- Juice facilities planning for the manufacture and distribution of fruit juice products throughout Australia
- Real option valuation of technology investments
- Retail promotional pricing strategy for dry goods to maximise returns in a competitive environment
- Risk assessment of major capital projects
- Strategic planning of a new \$100 million logistics network
- Sugar cane harvest and transportation optimisation – growers and millers
- Timber products supply chain strategy to optimise raw material usage, manufacturing, and product distribution markets
- Value Chain strategy for agricultural, consumer and industrial products.
- Wine company strategic review – market, operations and financial performance
- Wool facilities planning study to develop a distribution strategy for Eastern Australia.

Who are our clients?

Producers, processors, and distributors of agricultural products

Marketers of fresh and packaged foods, convenience meals, and snacks

Major grocery chains, specialty food retailers, and food-service providers

Manufacturers and distributors of food, beverages, and agricultural supplies

Financial services firms that directly serve the agribusiness and food manufacturing industries

Not-for-profits, governmental agencies and educational institutions that further agribusiness for the public good

Technology companies shaping the future of food, manufacturing and energy sectors.



Let us help you on the challenges ahead

Successfully managing strategic change and achieving breakthrough performance is rarely realised alone. Let us provide you with the specialist skills needed to deal with the challenges ahead – ensuring better decisions, greater resilience and a thriving future.

Strategic Scenario Planning

How Agribusiness companies respond to the big uncertain issues of our time – volatile commodity prices, shifts in global demand, food supply expansion, new technologies, climate change – can benefit from scenario thinking.

In this next era, investments will succeed or fail depending on how well they are designed to cope with uncertainty.

Our scenario planning methods enables companies to design a portfolio of strategic initiatives to succeed in a volatile world.

Decision and Risk Analysis of M&A and Capital Investments

Planning investments in agri-value chains?

A bigger menu of uncertainties in today's dynamic world provides innovative companies with opportunities to create new kinds of value – real option value.

Real Option Valuation is the method for dealing with risk and uncertainty in capital investment decisions.

Driving performance and value

Strategy and Program reviews can be an effective catalyst for meaningful change.

With our management science methods, your Return on Assets will improve – along with your ability to adapt to an ever-changing marketplace.



Benefits for your Company

Developing your Company's ability to succeed in a changing industry environment

Delivering on both shareholder value and sustainability objectives

Improving strategic planning and decision making processes

Driving implementation to deliver breakthrough results

Building organisational innovation and resilience.

The Future of Crop Insurance and Agricultural Risk Management

Symposium on the Future of Crop Insurance

In December 2014, Strategis Partners convened the Symposium on the Future of Crop Insurance, which brought together over 60 people from all States of Australia to listen to experts and users of Crop Insurance.

A key theme explored at the Symposium is that reducing uncertainty in crop production need not be costly for business — for farmers, for insurers, or for governments.

But systemic change is needed. When it comes to Crop Insurance, Australia can do better.

The way forward involves:

- Producers, agri-bankers and farm advisers increasing their knowledge of the role of insurance;
- Governments using ‘nudge’ policies to encourage producers to adopt insurance; and
- Insurers investing more in agricultural insurance product and market development.

Ag Risk Exchange: A Community of Practice in Agricultural Risk Management

Developing an Australian Community of Practice in agricultural risk management is an essential step forward. To remedy gaps in knowledge and to build resources for agricultural risk management, Strategis Partners is launching in 2015 a web-platform called ARX; short for Agricultural Risk Exchange.

In planning their enterprise, farmers often face situations of overwhelming choice, information overload, and information uncertainty. No more so is this the case in purchasing insurance. They are balancing multiple goals, including avoiding regret, satisfying the conditions required for bank credit, appearing prudent to others, maintaining a relationship with insurance agents, and avoiding premium payments that are too high – all in addition to reducing their chances of a catastrophic loss. To assist on these decisions, ARX will be a place for exchanging know-how, and providing education and training in agricultural risk management.



Contact us

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Jay Horton

Jay is the Founder and Managing Director of Strategis Partners. During his 25 year management consulting career he has advised a wide range of agri-food companies including Berri Juices, Coles, Goodman Fielder, Grain Growers Limited, Latevo International, McWilliams, SPC-Ardmona, Sugar Australia and Wesfarmers Limited.

Projects cover:

- Decision and Risk Analysis of Capital Investment
- Agri-Supply Chain Optimisation
- Scenario Planning and Strategic Risk Management
- Growth Strategy and Program Reviews.

In December 2014, Strategis Partners convened the Symposium on the Future of Crop Insurance, which brought together over 60 experts, policy-makers and practitioners from all States of Australia to map out the future of Multi-Peril Crop Insurance in Australia.

Jay has worked with a broad range of commodity producers, and developed a thorough understanding of dairy, fruit, grains, sugar and wool industries.

Jay is a former Partner of PricewaterhouseCoopers in their Corporate Finance Practice, with international firm McKinsey & Company, and Managing Director of management consultancy ORG Pty Limited. At PwC, Jay established and led the Agribusiness Services for PwC's Corporate Finance Practice, which advised clients on capital management and recovery, valuation and strategy, and M&A transactions.

His qualifications include Master of Economics (Australian National University), Master of Arts (The University of Sydney), Bachelor of Engineering (James Cook University), and Fellow of the Australian Institute of Company Directors.

