



# Sights on the future

**Our Land and Water NSC  
Symposium 2017**

Lincoln, 11 April 2017

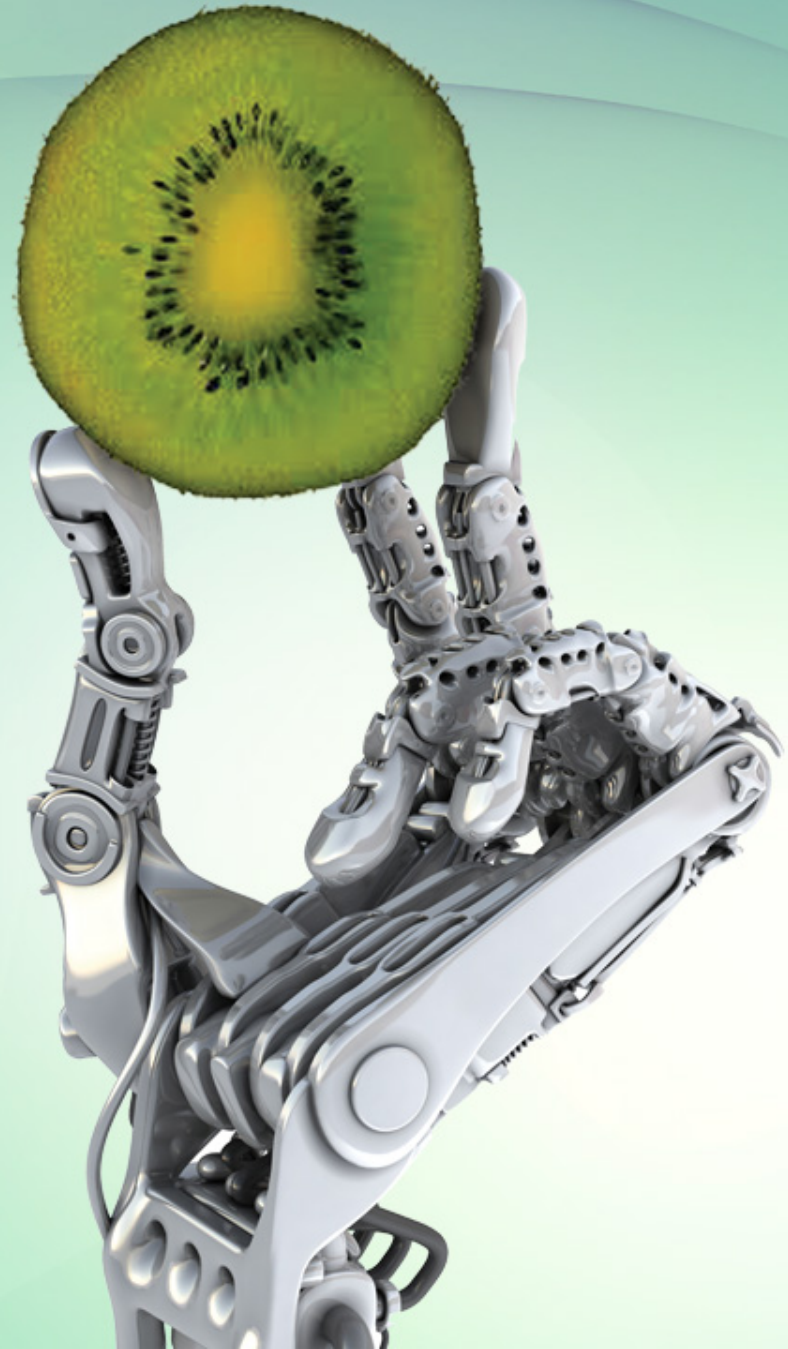
**Ian Proudfoot**

Global Head of Agribusiness

 @IProudfoot\_KPMG

April 2017

KPMG Agri-Food Foresight Solutions



# The size of New Zealand's prize

Export value



\$37 BILLION

6.75 Times

Estimated retail value



\$0.25

TRILLION

# Spotlighting disruption



# Asda introduces free-range milk following World Animal Protection campaign



By Jim Cornall+

01-Mar-2017

Last updated on 01-Mar-2017 at 16:09 GMT

Post a comment



Asda has introduced Free Range Dairy's Farmer's Milk to its dairy aisle.

Disruption comes everyday

# What has caught my attention in 2017?



DoorDash: Robotic delivery



Investor activism



Corporate impact



Core diversification



New trade paradigms



Climate change U Turn

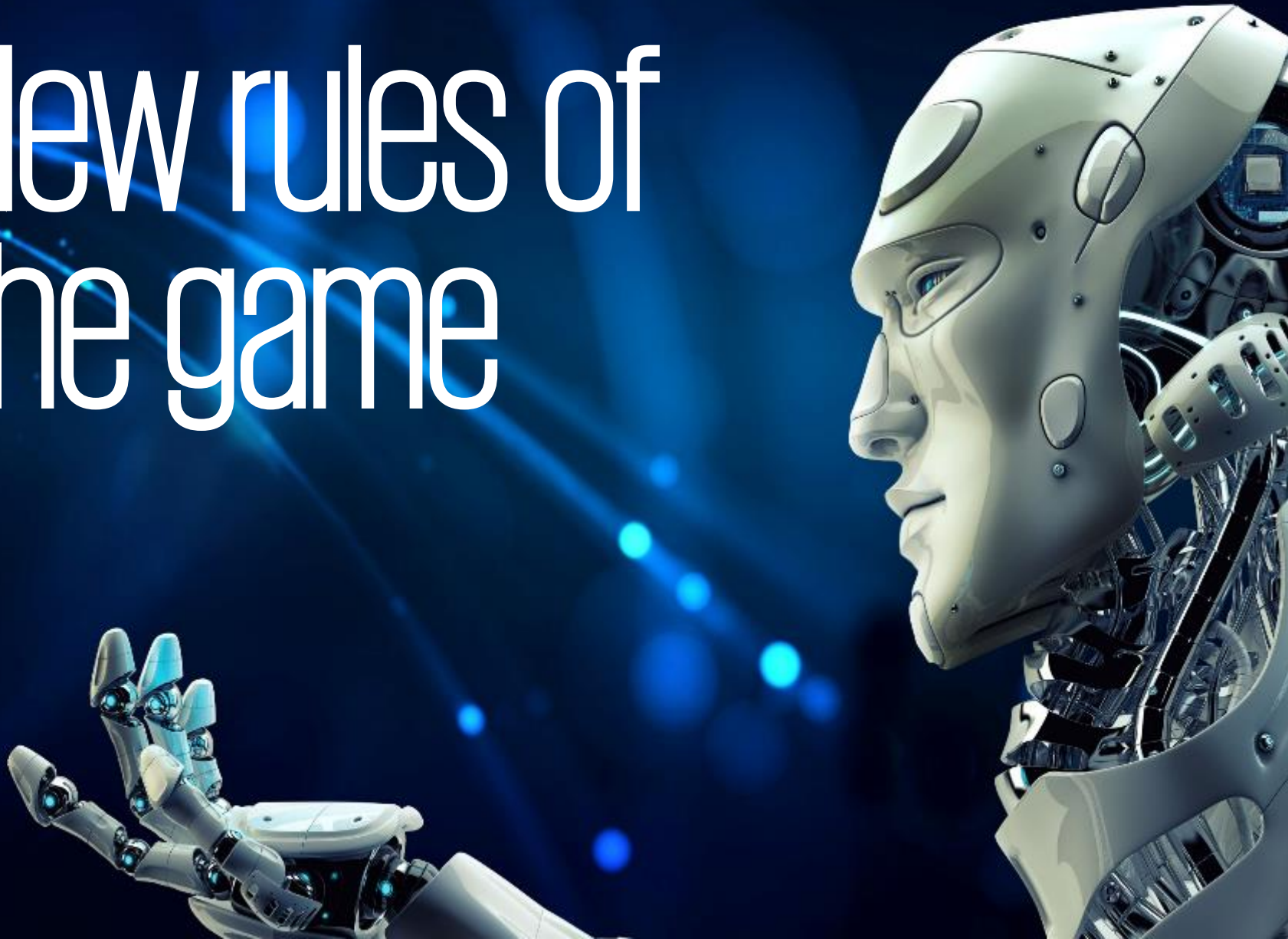


Digital innovation



Storied products

# New rules of the game





# SUSTAINABILITY DEFINES THE FARMING CONVERSATION



Restorative  
actions



Ethical  
employment



Increasing biodiversity



Swimmable water





# FUSION TECHNOLOGY TRIGGERS AGRARIAN REVOLUTION



Data and analytics



Blockchain



Accurate Agriculture



# HEALTH FRAMES THE FOOD CONVERSATION



# NEW COMPETITORS EMERGING



# 'CLEAN' PROTEINS GAIN TRACTION



# TRADITIONAL WAYS OF EATING VAPOURISE..... OR FOOD IS PRINTED.....



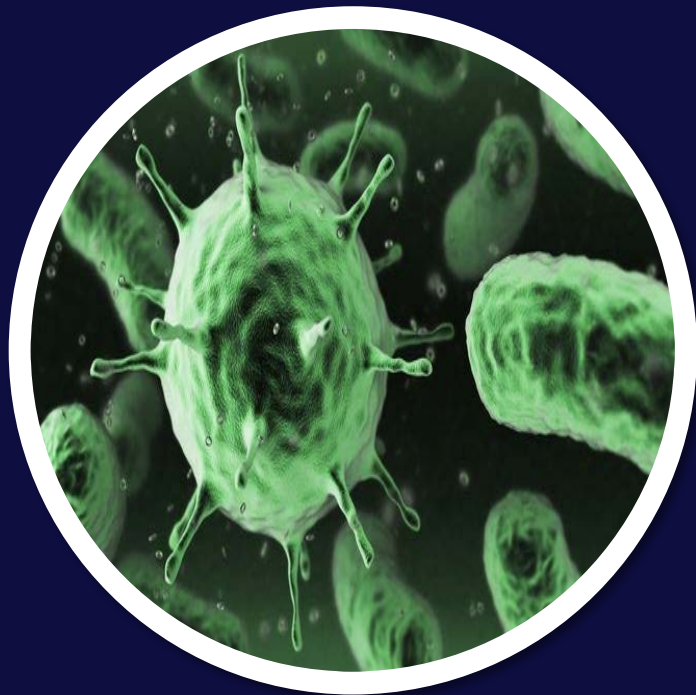
**FOOD**<sup>TM</sup>  
**INK.**





# DINING PARADIGMS RESPOND TO LIFESTYLES





## 'FREE FROM' ATTRACTS PREMIUMS

# THE GM CONVERSATION BECOMES AN ETHICAL ISSUE





# FOOD WASTERS RISK THEIR LICENSE TO OPERATE

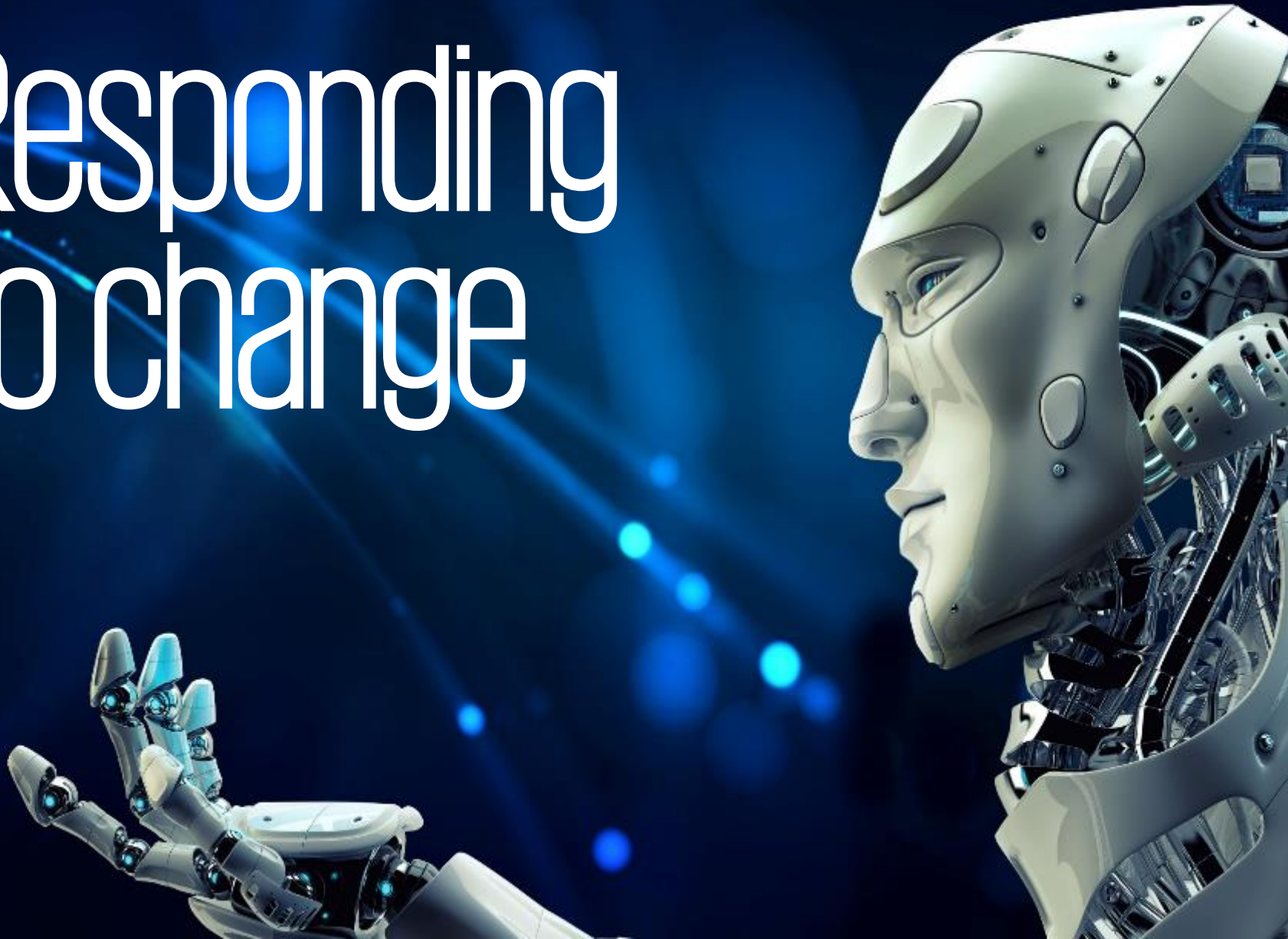


# THE PASSION OF THE FOOD PRODUCER WINS

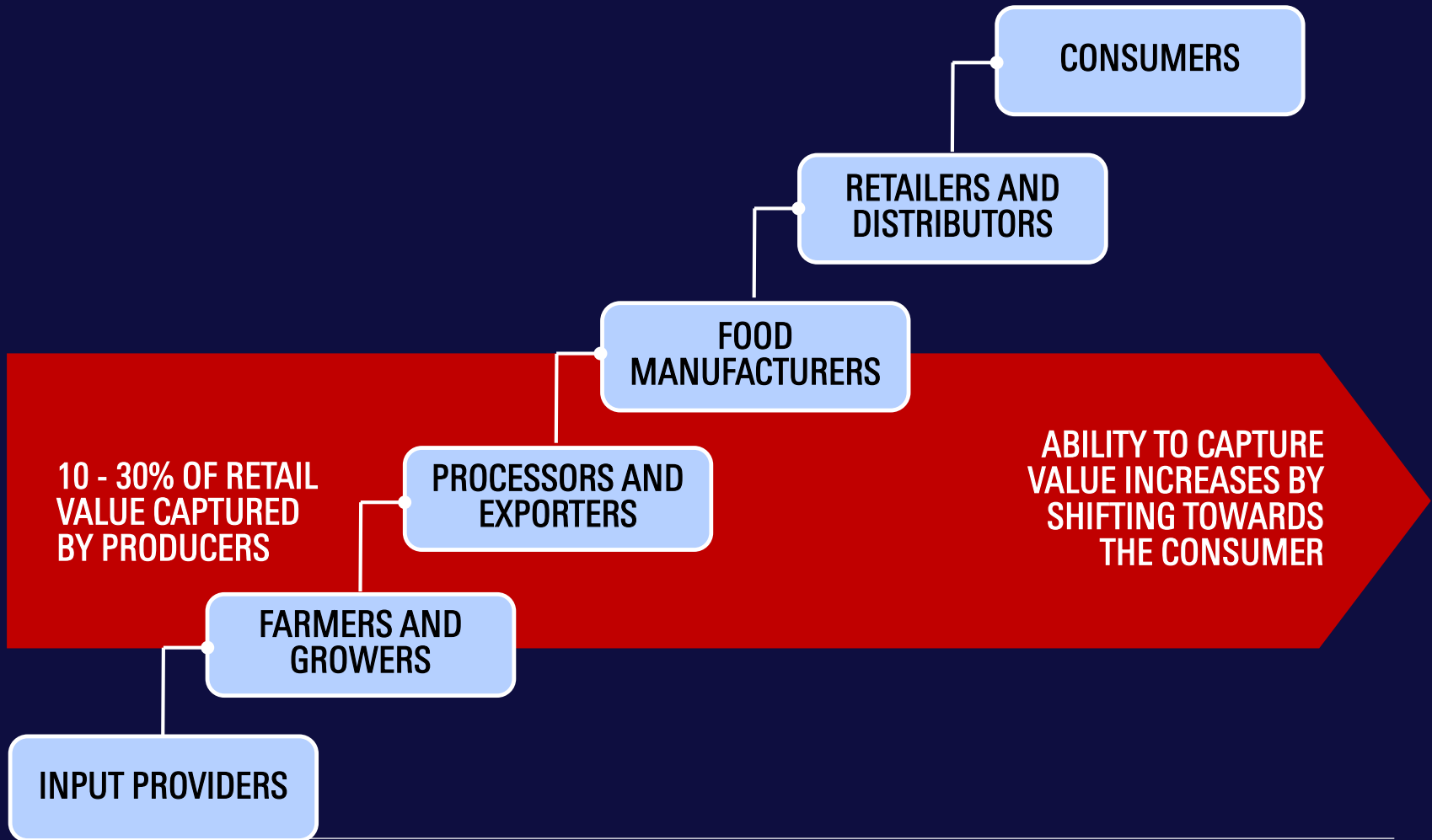


# VIRTUAL REALITY PUTS YOUR CUSTOMER ON YOUR FARM

Responding  
to change



# Financial returns will be driven by our role in the value chain



# Investment is necessary to get closer to high value customers



Limited  
competitive  
differential

Standing out drives value

# Responding to change



Foresight and scanning



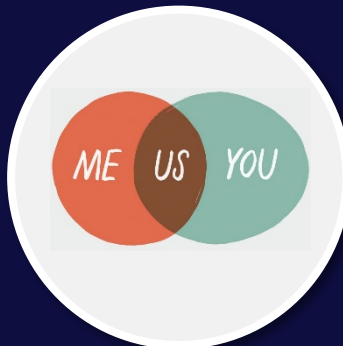
Enabling governance



Take risks/ fail fast



Focused innovation



Real collaboration



Consumer insight

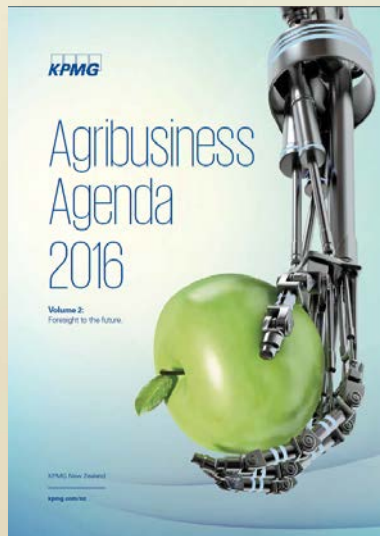




**“WE DO NOT INHERIT THE WORLD  
FROM OUR PARENTS - WE BORROW IT  
FROM OUR CHILDREN”**

*ORIGIN GREEN, BORD BIA  
IRELAND*





# Thank you

Ian Proudfoot  
Global Head of Agribusiness  
**KPMG Food Foresight Solutions**  
Auckland, New Zealand  
Email: [iproudfoot@kpmg.co.nz](mailto:iproudfoot@kpmg.co.nz)  
Office: +64 9 367 5882  
Twitter: [@IProudfoot\\_KPMG](https://twitter.com/IProudfoot_KPMG)  
Web: [www.fieldnotes.co.nz](http://www.fieldnotes.co.nz)

