



# Global perspectives

**Shaping NZ's Food and Fibre Future**

Wellington, 1 November 2016

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[kpmg.com/nz](http://kpmg.com/nz)





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

*ORIGIN GREEN, BORD BIA  
IRELAND*





# Whole Foods Market

**“WITH GREAT COURAGE, INTEGRITY AND LOVE,  
WE EMBRACE OUR RESPONSIBILITY TO CO-  
CREATE A WORLD WHERE EACH OF US, OUR  
COMMUNITIES, AND OUR PLANET CAN FLOURISH  
– ALL THE WHILE, CELEBRATING THE SHEER  
LOVE AND JOY OF FOOD”**

***PURPOSE STATEMENT  
WHOLE FOODS  
MARKET INC***



**“WE CHOOSE TO GO  
TO THE MOON IN THIS  
DECADE AND DO THE  
OTHER THINGS, NOT  
BECAUSE THEY ARE  
EASY, BUT BECAUSE  
THEY ARE HARD”**

*PRESIDENT JOHN F  
KENNEDY  
RICE UNIVERSITY,  
HOUSTON  
SEPTEMBER 1961*





# Millennial consumers



# The ageing population



# Urban citizens

Envision  
ing their  
food  
futures



# Millennial consumers



**THE HYPER-CONNECTED  
CONSUMER WHO SEEKS  
INSTANTANEOUS  
ACCESS TO THE LATEST,  
GREATEST THING**

# Millennial consumers



**Instantaneous access**



**Crowd source farming**



**Alternative proteins**



**Food is fashion**



**Social disruption**



**Food as a social connector**





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





# The ageing population



**AN EXPANDING COHORT  
OF SENIOR CITIZENS  
FACING LIFE MANAGING  
CHRONIC HEALTH  
ISSUES, ALBEIT MANY  
ARE EQUIPPED WITH  
FINANCIAL RESOURCES**

# The ageing population



**Food for chronic health**



**Tailored nutrition**



**Accessible packaging**



**Craft mainstreams**



**Passionate foodies with the time to explore**



**Something a little bit naughty!**

# Urban citizens



**THE RAPIDLY BURGEONING  
POPULATION, SWELLED BY RURAL  
PEOPLE **SEEKING A BETTER LIFE  
IN CROWDED, SPRAWLING  
METROPOLITAN REGIONS****

# Urban citizens



**'Bok Choy' effect**



**Seeking local food**



**Reinventing retail**



**On the Go Dominates**



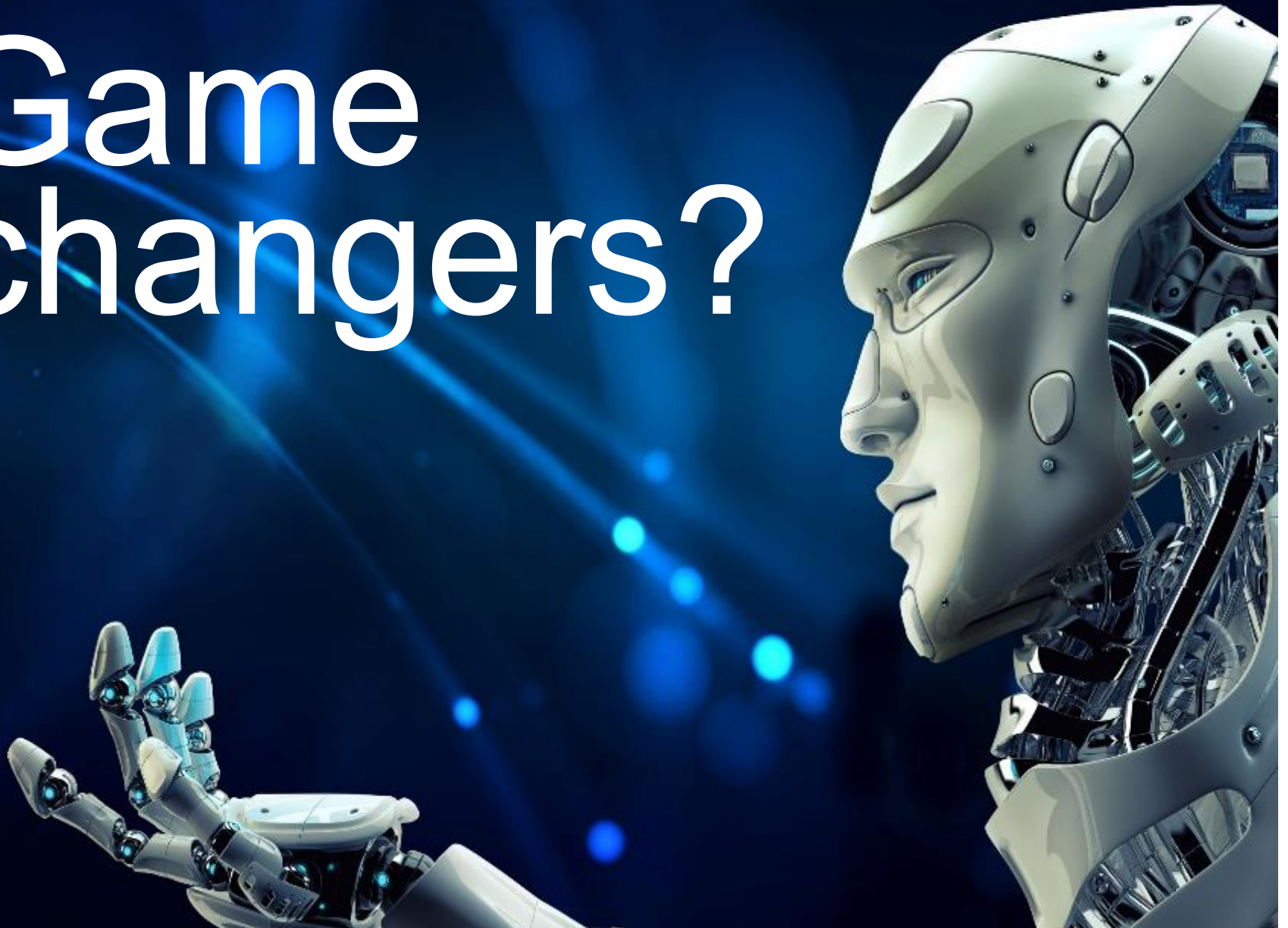
**New dining paradigms**



**Value in ultra raw**



# Game changers?





# Disrupting the future



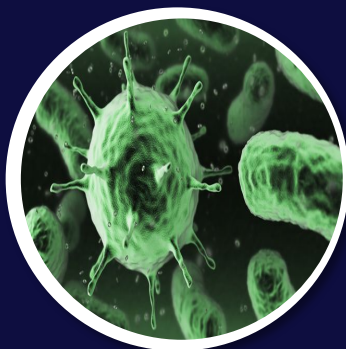
**New health paradigms**



**Industrialised cloning**



**Unbundling GMO's**



**Post antibiotic farming**



**Valuing every last drop**



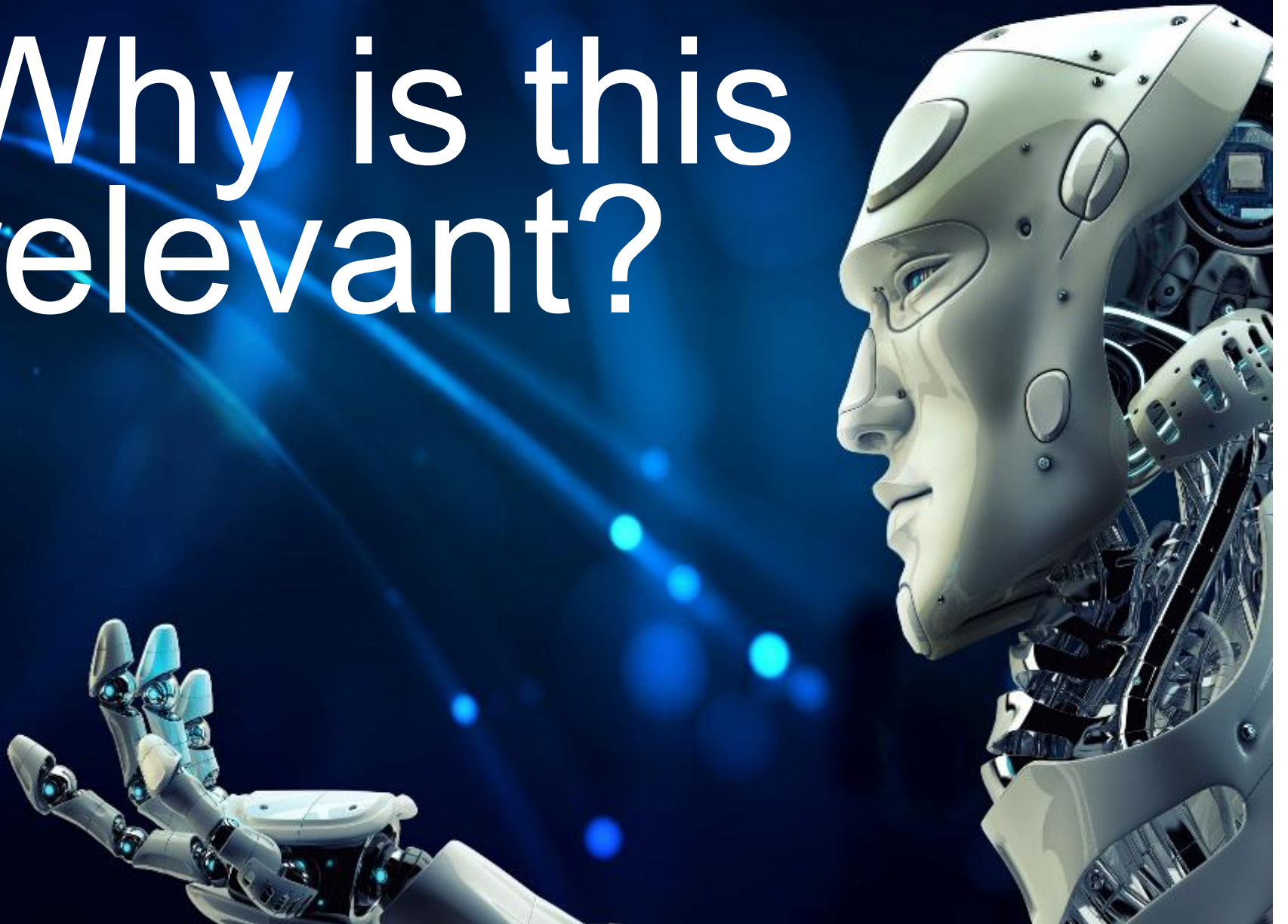
**Native flora and fauna**



Perfect Day



Why is this  
relevant?





# The size of New Zealand's prize

Export value



**\$37 BILLION**

6.75 Times

Estimated retail  
value



**\$0.25  
TRILLION**

# Investment is necessary to get closer to high value customers



**CRITICAL INTANGIBLE INVESTMENTS**



# Responding to change



**Foresight and scanning**



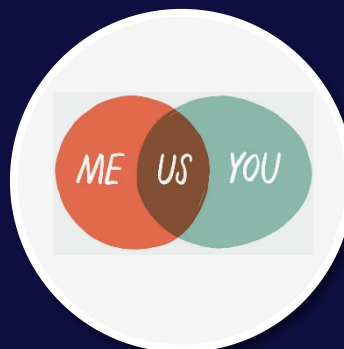
**Enabling governance**



**Take risks/ fail fast**



**Focused innovation**



**Real collaboration**



**Consumer insight**

# GAME CHANGER: Closing the GAP between Auckland and Rural New Zealand



ASB

MOUNT ALBERT  
GRAMMAR SCHOOL  
PER ARDUA AD AURORA







# Thank you

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