



Australian Agriculture in a Geopolitical Maelstrom

**The key geopolitical trends driving
challenges and opportunities for
Australian agriculture**

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Summary

Geopolitics shapes the world we live and work in. Right now, the geopolitical landscape is changing with a speed and depth we have not experienced in our lifetimes. Geopolitical mega-trends, namely, structural shifts in the international system, rising domestic political unrest, technological transformation, and climate change, are all in unprecedented motion, and are all being accelerated by COVID-19.

In Australia, the agriculture industry is particularly impacted by geopolitics. It is inextricably interconnected with the global market.

This analysis will explore how these geopolitical mega-trends could affect the Australian agricultural industry, generating both opportunities and risks.

Four key geopolitical themes affecting Australian agriculture:



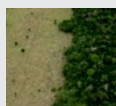
Shifts in the international system



Technological transformation



Rising domestic political unrest



Climate change

Key insights:



The strong international focus of Australian agriculture both drives growth opportunities, and exposes the sector to significant geopolitical risk.



Four geopolitical mega-trends are particularly affecting the agriculture industry: structural shifts in the international system; rising domestic political unrest; technological transformation; and climate change.



Critical components of success in agricultural trade are affected by geopolitics and these trends – including input control/availability, tariff and non-tariff barriers, consumer demand and preferences, and land productivity.

“Australian agriculture is intrinsic to key commodities and global food trade. Whatever happens in the world, matters to the Australian agriculture industry.”

Robert Poole, National Lead Partner, Agribusiness, KPMG Australia

The sector in focus

Agriculture is an important contributor to the Australian economy, worth \$68 billion at farmgate in 2018-19 across crops, livestock, fisheries and forestry, and employing 330,000 individuals in these industries¹. 19 million hectares of Australia's landmass is dedicated to agricultural production, driving the nation's reputation as a dependable producer of high-quality foods.

The sector is heavily focused on exports, which generated approximately \$54 billion in the year ending June 2019². Free Trade Agreements have unlocked extensive trade opportunities with major markets including China, Japan, South Korea and others in Asia, to supplement consistently strong export destinations such as Europe and the USA.

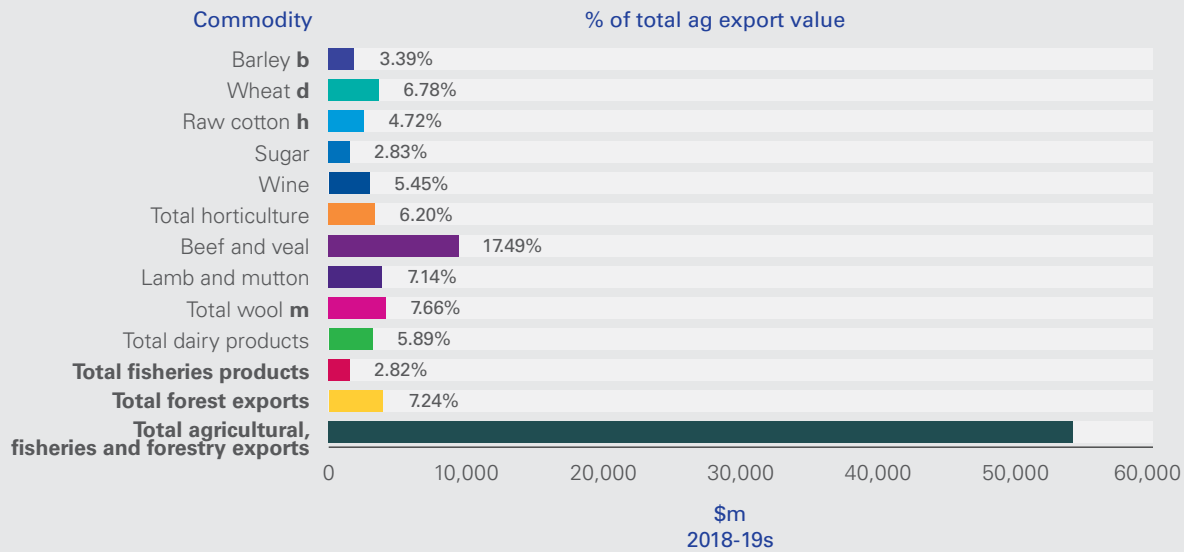
"Australia's agricultural future is now well and truly connected to global and Asian markets and will remain so for many decades, if not forever."

Doug Ferguson, Head of Asia and International Markets.

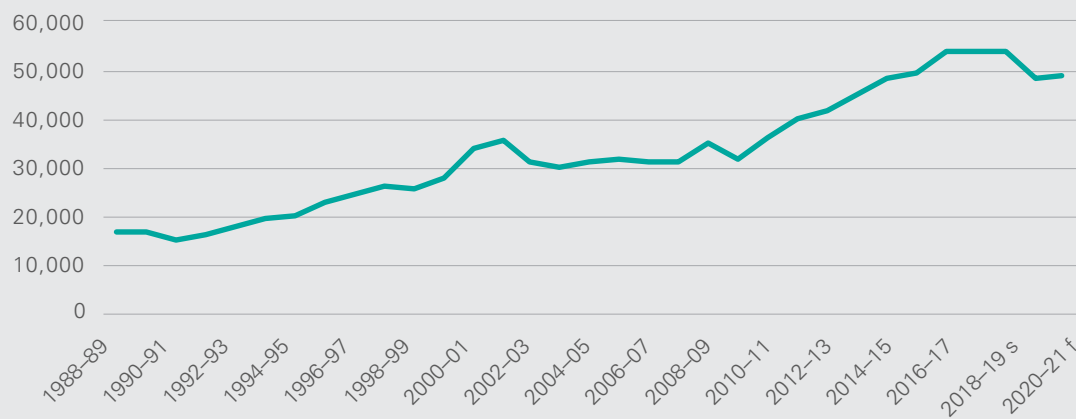
¹ Australian Government Department of Agriculture, Water and the Environment, 2020, ABARES Agricultural Outlook data, Accessed 8 May 2020, accessible [here](#).

² Ibid

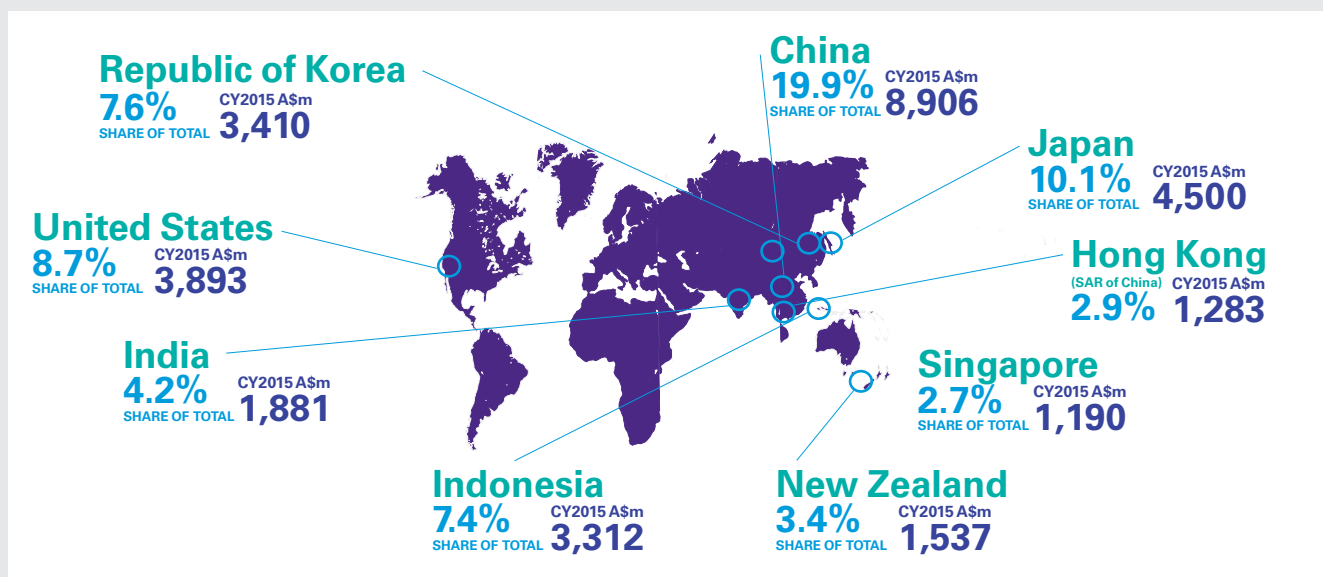
Sector exports



Total agricultural, fisheries and forestry exports \$m³



Major agriculture export markets



3 Australian Government Department of Agriculture, Water and the Environment, Agricultural Trade, Accessed 12th May 2020, Accessible [here](#)

Global geopolitical trends and Australian agribusiness

The deep international engagement of Australian agriculture provides enormous opportunity. At the same time, the significant emphasis on international trade also exposes Australian agriculture to geopolitical trends both at home and abroad. The agriculture value chain, from farm to consumer, is affected by a range of geopolitical issues that affect both the physical flows of goods through freight corridors and non-physical market access protocols. This is particularly the case in the Asian region, where Australian agricultural trade growth is concentrated and where geopolitics will affect both the strategic components of trade and the physical flows of agricultural produce through export supply chains via sea and air.

At home and abroad, Australian agriculture is dependent upon the trends and contexts of geopolitics.

Much is written each year about the major geopolitical risks facing organisations and industries – including for Australian agribusiness. For example, every year Eurasia Group, with which KPMG has an alliance, releases its Top Risks Report.⁴ Analysis by KPMG's Australia Geopolitics Hub shows that there are four key themes driving those geopolitical risks. These have been on the rise for several years, but COVID-19 has accelerated their impacts on Australian industries such as agriculture.

These themes are: structural shifts in the international system; increasing political unrest; technological transformation; and climate change. All of these themes interact and reinforce each other, and all affect the Australian agricultural industry.

The negotiation and signing of Free Trade Agreements (FTAs) has been pivotal to the growth of Australian agricultural exports in the past decade. Agreements signed with China (2015), Japan (2014-15), ASEAN (2009-10), South Korea (2014), and other markets across Asia have made Australian goods more competitive in these markets as tariffs are removed from the majority of agricultural products and additional arrangements are made for non-tariff barriers. FTAs are negotiated, updated and maintained under specific geopolitical contexts. This remains true in today's world, as existing FTAs are redefined and new agreements are negotiated to support future agricultural trade.

⁴ Eurasia Group Top Risks 2020: Coronavirus Edition: <https://www.eurasiagroup.net/live-post/top-risks-2020-coronavirus-edition>



1. Shifts in the international system

For Australian agribusiness, the two most relevant shifts in the international system are the rising economic strength of Asia, and US-China strategic competition.

Australian agriculture has for some years been looking to the rising economic strength of Asia as an opportunity. In Australia, over 75% of agricultural produce is exported, with increasing value and volume of trade centred on the high growth Asian region⁵. The prosperity of the industry therefore relies on the geopolitical twists and turns that occur in our neighbourhood, affecting the industry's value chain and producing both novel challenges and substantial opportunities in Australian agriculture.

The accepted understanding for some years has been that as our northern neighbours become wealthier, they will not only consume more, they will also increasingly demand the kinds of high quality, premium goods Australian fishers and farmers produce, such as in dairy, horticulture, beef and wine⁶. This will provide an opportunity for Australian agribusiness to play to the strength of farmers and fishers as land and water custodians and guardians as a means of building reputation and trust, and to build on the reputation of Australian agriculture as a trustworthy, high-quality industry.

The speed of developments in technological transformation and the associated ability to quickly and

accurately track and trace the origin and travel route of goods means that as Asia's economic strength increases, growing numbers of consumers in our region will not only demand premium quality, but will also be able to rely on directly accessible data to ensure they get it.⁷ A growing global trend of mistrust in both business and political elites, as will be examined shortly, will likely further motivate wealthier consumers to demand direct, first-person information to ensure their goods meet their concerns around, for example, food safety, biosecurity, and environmental and social sustainability.

At the same time as we look to Asia as a potential market for Australian agricultural products, we also need to be cautious around expectations of Asia's growth and demand role in the light of COVID-19. The World Economic Forum describes the impact of coronavirus on the Asian region to be "severe and unprecedented".⁸ Both the global economic slowdown overall and China's slowdown in particular have critical implications for the economic outlook for Asia. However, while the immediate term prognosis is highly uncertain, growth across Asia as a whole is expected to rebound strongly, even by 2021. Of course, this depends on multiple complex variables, many of which are still not well understood.

Importantly, the impacts of COVID-19 are not evenly spread, and some countries in the region are recovering more rapidly than others. In some

developing Asian countries, under-funded public health systems, high population density, limited access to clean water and sanitation, and high levels of informal employment and poverty could limit the success of recovery efforts.⁹ The management of and recovery from COVID-19 has the potential to profoundly reconfigure expectations of growth and increases in middle class wealth, and subsequent demand for Australian products. As such, food availability and security will likely remain a front-burner issue for many millions of people in the region.

The changing socio-economic demographics in Asia will be something for Australian agribusiness to continue to monitor closely.

Tensions between the two major world economies, the US and China, have been increasing in recent years and resulted in tariff and non-tariff barriers being applied to a range of commodities and products, including in agriculture. For Australian agribusiness, the impacts arise from how we are viewed by the actors involved, and whether Australia is seen to be neutral or not. The broader geopolitical context in this regard is outside of businesses' ability to control. As such, it is critically important for businesses to ensure they develop resilience and adaptability, including through investing in developing practical knowledge of the macro and local-level circumstances, and keeping close track of political trends.

"COVID-19 has already had profound impacts on Australia's agricultural exports to Asia. Goods moved by air freight are feeling the biggest impact. "Until air traffic into and out of key markets is restored, our ability to supply fresh chilled beef and sheep meat, lobsters and abalone, fresh fruit and vegetables including avocados will be limited, despite demand from foreign consumers who trust our supply and want to buy more."

Doug Ferguson, Head of Asia and International Markets.

⁵ For more on the role of Asia in Australian agriculture see 'Advancing Australian agriculture in partnership with Asia', Doug Ferguson (2018), ABARES Outlook Conference, 6 March, accessible here.

⁶ Australian Government Department of Agriculture, Water and the Environment, Agricultural commodities report, economic overview (2020)

⁷ Australia's Agricultural Future: the social and political context. Report to the Australian Council of Learned Academics (2015), p. 49

⁸ <https://www.weforum.org/agenda/2020/04/covid19-pandemic-asia-growth/>

⁹ <https://assets.kpmg/content/dam/kpmg/au/pdf/2020/covid-19-asia-pacific-region-australia-implications.pdf>

The importance of diversification in a geopolitically uncertain world:

Over the past 20 years, exports to Australia's top eight agricultural markets in Asia have increased by 110%, whilst trade into all other countries (including the USA and New Zealand) dropped by 10%¹. Australian agriculture has developed a reliance on China in particular as a market that delivers the highest price, largest consumer demand, and most established supply chains – now representing approximately 20% of all Australian agricultural exports.

However, this exposes Australian agricultural trade disproportionately to changes in the market conditions of these countries. Some industries have been particularly affected, with exposures of up to 90% of the sector to individual markets, including in some seafood categories. In May 2020, China established 80% tariffs on Australian barley and withdrew approvals for four major Australian beef abattoirs – instantly removing significant export revenues for these industries, hopefully only in the short term, and placing pressure upon local producers and processors.

Disruptions in supply chains:

This unrest and political uncertainty has further direct implications for Australian agribusiness in terms of potential supply chain disruption. Geopolitics can have physical impacts as well as diplomatic and market access challenges. Incidents that affect major trade and supply chain routes, such as in the South China Sea, the Strait of Hormuz, or the Panama and Suez Canal shipping routes, among others, can hinder the ability of Australian agricultural exporters to deliver their goods using timely and efficient freight – subsequently impacting profit margins and product integrity.

For example, Australia is heavily reliant on globally integrated supply chains for inputs such as fertilisers, fuel and chemicals. In the case of fertilisers, Australia imports most of its nitrogen, phosphorous and potassium from five countries: China, Russia, India, United States and Indonesia. The Middle East is becoming increasingly important as a fertiliser supplier. Disturbances in these areas could pose a significant risk of fertiliser supply chain disruptions.²

“By 2050 the earth's population is projected to exceed 9 billion people, another 1.4 billion from now. That's equivalent to 1.8 times Australia's current population each year for the next 30 years, with China, India and ASEAN the key drivers in our region. Food supply will need to increase by 60% to meet this rising global demand – that's an enormous opportunity for Australia. But at the same time, it raises issues around food security as a real concern – not only for the obvious humanitarian reasons, but also because hungry stomachs and rapidly increasing food prices can quickly lead to mass social unrest. “The coronavirus outbreak has highlighted a number of Australian agribusiness service sectors including food security, traceability and cold-chain logistics, to ensure that food products are fresh, safe and do not pose a risk to the health of foreign consumers.”

Doug Ferguson, Head of Asia and International Markets

Other parts of the world system are also shifting and repositioning, including the Middle East, Europe, and Latin America. The unpredictability arising from these movements have implications for, for example, production and supply of critical resources and connecting to these regions from both an import and export perspective for Australian agriculture. Food security and food safety are also likely to become critical challenges in less developed regions that may be exposed to changing trade conditions and core issues such as climate change.¹⁰

“The key question here is, how sustainable are the trade barriers and what are their impacts? At what point do associated costs for businesses result in a dialling back?”

Robert Poole, National Lead Partner, Agribusiness, KPMG Australia

¹⁰ REFS for in-box 1: “Australian Government Department of Agriculture, Water and the Environment, 2020, ABARES Agricultural Outlook data, Accessed 8 May 2020, accessible [here](#).”; in-box 2: Stefan Hajkovicz and Sandra Eady (2015); “Rural Industry Futures: Megatrends impacting Australian agriculture over the coming twenty years,” CSIRO Rural Industries Research and Development Corporation, available [here](#).

Scepticism around foreign investment into agriculture:

As Australian agricultural goods have experienced explosive demand growth abroad, particularly across Asia, foreign businesses have identified the opportunity to capture this value by purchasing or investing in Australian farms and food businesses. High profile examples such as Van Diemen's Land Company in Tasmania and Kidman Beef have contributed to approximately 13.4% of all Australian agricultural land (52.6 million hectares) being owned by foreign businesses in 2017-2018. The UK (2.6%) and China (2.3%) account for the largest shares of this.

Similarly, there has been significant debate around the ownership of contributing infrastructures and assets that both affect agriculture as an industry and Australia's regional communities. Water, energy, internet and other infrastructure is increasingly subject to foreign interest. These inputs are critical to enable continuity in agricultural production, and also support rural Australians with connectivity and communication. Their ownership and relevant to geopolitics will impact livelihoods across the country.

2. Rising domestic political unrest

Uprisings and protests around the world have become an increasingly common feature of our news in the last two or three years. Driving this unrest is a growing discontent with real or perceived inequality – that the wealthy elite are becoming wealthier, at the cost of the rest of the population, who see their wages stagnating and their standards of living dropping. The mistrust is directed both at government and at business – which includes food producers and manufacturers. Examples in agriculture centre around scepticism at foreign investment in agricultural assets, and will increasingly involve food security across regions as economic downturns lead to reduced availability and affordability of foods. COVID-19 exacerbates these inequalities, with disparities between the 'haves', those with better access to health services, good sanitary conditions, technology to enable them to continue to work remotely, and the 'have-nots', who don't – both within and among countries.

This increase in political unrest has a number of flow on effects with implications for Australian agribusiness.

Of particular note is the related increase in the number of populist-style leaders around the world which has impacts on both domestic and

international trade and business environments. Leaders around the world are drawing on these growing feelings of marginalisation and disenfranchisement to promote their own populist political agendas, and as a result, exacerbating and causing even deeper social divisions. The populist approach of 'the people' as being always right often leads to the erosion of domestic institutions like free media, civil society, and independent rule of law. As a result, in countries with populist leaders, trade and investment policies are likely to demonstrate an apparently unpredictable political rather than economic logic. Examples of this kind of political logic can include regulations and requirements around taxation or customs, in both the rules themselves as well as their interpretation.

Internationally, populist politics and its associated anti-globalisation and pro-nationalism agendas underpin views of international institutions as threats to national sovereignty and identity. Populist leaders therefore tend to follow an inwards-facing approach rather than engaging in international cooperation in the pursuit of global public goods. This results in the diminished ability of international institutions such as the G7, G20, and the World Trade Organisation (WTO), to manage global challenges. The WTO is an illustrative example: lack of reform of the organisation over the past two decades has meant many

countries have turned to bilateral trade agreements – focusing more on pursuing bilaterally competitive benefits in particular markets rather than working towards a regional outcome.

Eroding institutions and global cooperation increases the likelihoods of trade barriers to the products Australian agribusiness export. While Australian governments have worked hard to establish FTAs with regional partners, ultimately, the implementation of these agreements depends on positive ongoing politics and relationships. Biosecurity incursions such as COVID-19 also represent natural barriers to trade, with related closures to borders coupled with strategic intentional government decisions to amend agreements.

It is possible that the impact of COVID-19 means that multilateral organisations become more necessary than ever to provide international trade arrangements stability and legitimacy. Without their influence, supply and price of agricultural commodities on the global market may be more likely to fluctuate. There may in the future be a renewed call for reformed multilateral bodies given the growing need for external and objective trade governance, but it is likely that their shape and make-up may be significantly different from those we have been used to in the last two decades.

¹¹ See for example Benjamin Moffitt (2016), *The Global Rise of Populism*, Stanford University Press: Stanford, California

¹² Masimiliano Santini, 'How should development organizations work with populist governments?', The Brookings Institute, <https://www.brookings.edu/blog/future-development/2018/11/29/how-should-development-organizations-work-with-populist-governments/>

3. Technological transformation

While globally the agriculture industry remains highly manual, the agriculture sector in Australia has a long history and culture of innovating using technology and digital assets, in the consistent quest towards higher productivity, larger yields, and enhanced quality.

However, the role of technological innovation in something as fundamental as food is not always met favourably by consumers. One key example of a persistent backlash to technological development in food production is around genetically modified organisms (GMOs). Jose Graziano da Silva, the then- Director-General of the United Nations Food and Agriculture Organisation, argued that technologies including genetic engineering need to be integrated with agro-ecology to meet the challenges of food security and climate change.¹³ Despite these kinds of statements, opposition to GMO continues. Consumer opposition to genetic modification is based on perceptions that GMO produce may cause allergies and illness, and is “unnatural, immoral and unsafe.”¹⁴ These passionately held views arise from the “intensely personal, emotional and social experience” of food consumption, and its intimate connection to both health and culture. This means that trust in food producers, suppliers and regulators is easily lost and very difficult to regain.¹⁵ These perceptions have real impacts: when the European Commission implemented strict GMO labelling laws, sales dropped.¹⁶

These views are resilient. As noted above, as consumers in many parts of the world are growing wealthier, consumer sentiment is increasingly demanding ‘trustworthy’ agricultural

produce, including locally-sourced, environmentally friendly, organic, and non-genetically modified. The image of a large corporate farm and its associated opaque mass-scale supply chain is increasingly unpalatable to consumers both in Australia and around the world.¹⁷

Technology is also enabling consumers to accurately track and trace the source and the route of their produce – becoming a standard expectation rather than a ‘nice-to-have’ desire. At the same time, digital and technological advances are providing Australian agribusiness the opportunity to demonstrate their competitive advantage in these areas. In a post-COVID world where biosecurity and food safety sits higher on the priority list of consumers and governments, these traceability systems and capabilities will become necessary assets and will drive subsequent technological integration throughout the supply chain – encouraging uptake of additional systems and platforms.

One area to watch in agricultural trade in the near-term future is the potential for disruptions in inter-operability of technologies, including via the 5G network. As different global actors pursue different approaches and standards around technological innovation, compatibility of technology systems between Australia and some of our key agricultural export markets is likely to become increasingly challenging. At this point in time, it is not clear how the issue of digital inter-operability will play out, however there are few signs to suggest that collective governance in either the economic or security realms is keeping pace with the rapid changes currently underway. The consequences of a potential breakdown in information infrastructure for production and movement of agricultural products are profound.

“Agriculture in the 21st century will be defined by faster and more interconnected supply chains, increased complexity, and need for trusted data. This context will give rise to new forms of economic ecosystems that will differentiate by their ability to codify trust and use technology to real-time manage risk. The platforms that will power these ecosystems will facilitate better access to capital, implement predictive modelling to prevent disruption to supply chains and enable corporate agility to respond to realised risks and reduce their impact.”

Laszlo Peter, Head of Blockchain Services, Asia-Pacific



¹³ <http://www.fao.org/news/story/en/item/250148/icode/>

¹⁴ <https://www.ama.org/2018/08/29/why-consumers-dont-see-the-benefit-of-genetically-modified-foods-and-what-marketers-can-do-about-it/>

¹⁵ Australia's Agricultural Future: the social and political context. Report to the Australian Council of Learned Academics (2015), pp 42-43

¹⁶ <https://www.ama.org/2018/08/29/why-consumers-dont-see-the-benefit-of-genetically-modified-foods-and-what-marketers-can-do-about-it/>

¹⁷ Australia's Agricultural Future: the social and political context. Report to the Australian Council of Learned Academics (2015), pp 42-43



4. Climate change

In its 2020 Global Risks report, the World Economic Forum's top five risks are all environmental.¹⁸ Severe weather events such as droughts and storms are becoming more frequent, and critical resources such as water are under pressure. Countries which rely on agriculture are likely to be the most impacted, including those with harsh climates such as Australia.

Despite being a strong export industry and being interconnected with regional and global trade flows, the Australian agriculture industry first and foremost operates in a domestic context. Food and agricultural goods, regardless of their end destination, need to be grown or produced in Australia at the start of the supply chain.

For Australian agribusiness, rising temperatures mean that livestock are at greater risk of heat stress, reducing productivity and reproductive rates; growing seasons for crops and horticulture will be squeezed in some locations, but extended in others; and changes in rainfall, temperatures and natural disasters are resulting in an increasing risk of declining productivity in the forestry sector.

Climate change poses new challenges to Australian agriculture in some areas, but also creates opportunities in others. For example, the increased frequency of drought conditions has the potential to affect agricultural yields, however it can also drive innovative water consumption measures. Australian farmers and fishers are at the forefront of adapting to, and mitigating, climate change.¹⁹ To remain competitive, we need to continue to improve productivity in sustainable ways – including through technological means.

The Australian government has been aware of climate change challenges for some time, introducing initiatives such as Australia's Farming Future in 2011 which provided funding to equip primary producers to adapt and adjust to the impacts of climate change,²⁰ and the Climate Change Research Program to equip primary producers with strategies to meet the challenges of the changing climate.²¹

In addition to these primary impacts of climate change on Australian agribusiness, other geopolitical themes such as the growing lack of trust in elites and the desire for environmentally sustainable goods, along with the increased ability to track and trace the origin

and movement of goods, means that consumers in Australia and the rising middle class in Asia are likely to favour environmentally conscious products. Australian agribusiness has an opportunity to position itself as a market leader in the sustainable environmental management space.

These sentiments and consumer preferences may play a lesser role during the COVID-19 crisis as availability and price of food becomes the primary driver of purchasing decisions, over quality and sustainability. The extent to which and timeframe within sustainability returns to the consumer agenda will depend on the impact on global supply chains and food availability, and the discourse around food safety and security that drives consumer concerns.

"The key question around climate change for the Australian agriculture industry is to what extent, and how quickly, environmental sustainability resumes its position as a key concern for governments and consumers after COVID-19."

Robert Poole, National Lead Partner, Agribusiness, KPMG Australia

¹⁸ World Economic Forum, Global Risks Report 2020, Chapter 1, Risks Landscape: <http://reports.weforum.org/global-risks-report-2020/chapter-one-risks-landscape/>

¹⁹ https://theconversation.com/australian-farmers-are-adapting-to-climate-change-76939?gclid=CjwKCAjwku1BRAIEiwA2mJRWRzoTOPLSKwYIGVNWlJjvXqekNlcTfS4Sw0JIEub3TD4mHwZDfquyRoC2-kQAvD_BwE

²⁰ <https://www.agriculture.gov.au/ag-farm-food/climatechange/australias-farming-future>

²¹ <https://www.agriculture.gov.au/ag-farm-food/climatechange/australias-farming-future/adapting-to-a-changing-climate>

Strategic steps to manage geopolitical uncertainty as an Australian agribusiness

These geopolitical trends both challenge Australian agribusinesses, and provide opportunities. KPMG has identified a number of key strategies that organisations and industries can utilise to manage risk, ensure continuity, and drive growth during periods of geopolitical uncertainty. Following these logical steps can enable proactive responses to geopolitical events in an ever-changing world.

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Translate the trends

Understand what the uncertain geopolitical environment means for your business. Turn the trends, news stories and insights into tangible, practical considerations that are relevant to your context and will help you to navigate uncertainty in a strategic and responsive way.

Know your exposure

Develop these insights into how this will affect your top and bottom line. Model scenarios in your supply chains and gauge whether you can continue to service customers in the same ways as before. Analyse your entire value chain, including impacts to your suppliers and critical stakeholders – gaining a holistic and deep understanding of which parts of your business are most exposed and where you should focus response effort.

Develop your strategy

Form a targeted and proactive strategy that addresses key elements for your business. Factor in both best and worst case scenarios – considering how you will implement change to both your business and operating models. Answer the key questions – can you maintain business as usual? If not, what does your new normal look like? Consider how you can both address challenges, and uncover new opportunities.

Keep current

Recognise the dynamic nature of geopolitical events, which change day-by-day. Ensure continued update of your strategy and that you are responsive to new developments. Keep close to your network – engage with your stakeholders, openly discuss new events and determine how to proceed in a proportional and considered manner.

KPMG's specialists can support you along this journey – please reach out to the key contacts in this report if you would like to discuss how this applies to your organisation.



What can KPMG do for you?

KPMG is a global consulting, tax and audit business, with offices in over 150 countries worldwide, and coverage across every state in Australia.

Our Australian firm has a number of capabilities which can support you in navigating geopolitics and what this means for your business.

Australia Geopolitics Hub

The Australia Geopolitics Hub (AGH) provides solutions and thought leadership to track and effectively navigate geopolitical complexity and risk. The AGH draws on specialised capabilities across KPMG in Australia and globally to provide tailored and practical roadmaps for success in these uncertain geopolitical times.



Access Asia

Access Asia is KPMG's response to the increasing trade opportunities in the high growth Asian region. We utilise our teams of dedicated specialists to assess opportunities in international markets and build relevant strategies for accessing them.

Understanding and entering international markets is complex, and as such we will tailor our analysis and work to your needs. Our Australian team members have extensive experience of living and working in key Asian markets, enabling us to bring their first-hand knowledge to bear for you.



Food and Agribusiness Sector

Our industry specialists work along the AgriFood supply chain, assisting clients with developing strategies, business and operating models to meet the new and dynamic contexts faced by the sector in Australia. Many of our team members have rural backgrounds themselves, and our team has experience across all major agricultural categories – from meat to horticulture, grains and seafood.





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