



Our Capabilities

First Quarter 2015

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Overview

Freshagenda is a team of specialists with expertise in interpreting market and supply chain conditions in the **food industry**.

We offer insights and analysis that is based on a big picture view, a whole-of-chain perspective and objective commercial reality.

What sets us apart?

- We have a working commercial understanding of the dynamics affecting key agrifood sectors and supply chains.
- We analyse and interpret supply chain drivers and trends from farm to consumer, both domestic and international.
- We maintain an ongoing watch on major developments and global change agendas that impact the food industry.
- Our work is packaged for specific audiences and decision-making requirements.
- Our presentation is highly visual –the most effective way to deliver messages to a target audience.
- We are a small, experienced team that offers agility in approach and response.
- We get to know our clients and strive to be proactive to their needs, becoming valued partners in their business.
- We get the work done on time and aim to exceed expectation.



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What we offer



What is it?

<ul style="list-style-type: none"> • Developing strategy • Scenario planning • Industry or enterprise application • Understanding context 	<ul style="list-style-type: none"> • Assessing options for implementing strategy • Evaluating business cases • Feasibility studies 	<ul style="list-style-type: none"> • Tailored analysis for critical decision inputs • Bespoke scope and format • Knowledge development initiatives 	<ul style="list-style-type: none"> • A range of information products packaged for specific audiences
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Some examples:

<ul style="list-style-type: none"> • ADIC vision development and priority setting • Oilseeds industry plan • Horizon 2020 project for Australian dairy • Regional dairy planning • Farm enterprise long-term business planning 	<ul style="list-style-type: none"> • Market entry evaluations • Market and product innovation needs • Pricing design 	<ul style="list-style-type: none"> • Assessing financial & physical impact of change • Analysing food category dynamics and innovation drivers • Global, national, regional industry analyses • Dairy sector outlooks • FOODmap analyses • Tracking food affordability 	<ul style="list-style-type: none"> • Global Dairy Directions • Dairy Globe (Australia) • MyFarm Dairy Globe (NZ) • Acquila Cap Agricultural News • Horizons newsletter • Client branded newsletters • Dairy business navigator (long-term simulator) • Milk pricing simulation
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Our directors

Steve Spencer - Director

- Steve has significant experience in the analysis of many agrifood sectors and their supply chains, with a strong emphasis on dairy.
- Steve has worked across the Australian food industry in dairy, processed food, livestock, and poultry industries, as well as industry policy in the areas of innovation, trade, and competition.
- He has undertaken extensive studies of food price determination within the retail market and various analyses of industry profitability and performance, as well as facilitating industry and enterprise planning.

Joanne Bills - Director

- Joanne is an agribusiness professional, with almost two decades spent in the dairy industry. Joanne's skills include market and industry analysis, strategy development, knowledge management and communication. Joanne is one of the dairy industry's most trusted sources of well-considered information, analysis and advice on the Australian and international dairy sectors.
- Joanne is a director of GippsDairy, the Regional Development Program for Gippsland. Prior to joining Freshagenda, Joanne was responsible for the collection, processing and dissemination of industry data with Dairy Australia, and was the lead author of the Situation and Outlook report for the Australian dairy industry.

Support Team

- The directors are supported by a small team of experienced analysts who are involved in the project research and delivery, and in the preparation of a number information products.

Who we have worked with



Examples of recent work

Nature	Role	Key features	
Strategy development	Working with leadership of a listed agribusiness company to identify, evaluate and prioritise major improvement strategies	<ul style="list-style-type: none"> Identifying key business improvement opportunities Developed an integrated long-term business simulator Modelled scenarios and their impact on earnings and value 	
Food pricing	Undertook a major study for an industry R&D Corporation into determinants and trends in food pricing in Australia from farm to consumer	<ul style="list-style-type: none"> Mapped agrifood supply chains and key price/cost drivers Accessed credible, like-for-like data on price points thru-chain Assessed transparency of pricing information to participants 	
Implementing strategy	Assisted our client determine the preferred approach to sourcing raw inputs after securing major new customer commitments.	<ul style="list-style-type: none"> Developed future regional market and supply scenarios Assessed pros and cons of each pathway Identified preferred option in line with long term strategy 	
Market entry	Assisting a client evaluate market entry for an animal productivity tool into the Australian dairy market.	<ul style="list-style-type: none"> Identified stakeholder relationship and influence Assessed market and supply chain sensitivities and impacts Assessed cost-benefit equations for end-users of the product 	
Horizon 2020	Designed and led a major project to identify the medium- to long-term priorities for the Australian dairy industry	<ul style="list-style-type: none"> Articulated major future global food agendas driving change Developed Australian industry scenarios for use in planning Developed desired future industry outcome Prioritised areas of collective industry effort Assisted industry peak body develop vision and priority statement 	
Innovation priorities	Assessed future innovation requirements of food processors, and the scope to improve effectiveness of industry co-investment.	<ul style="list-style-type: none"> Developed a framework to map various drivers of innovation Assessed major gaps in resources, capability, delivery Developed priorities to improve performance of these investments. 	
Beef supply chain	Carried out a study for a major producer into the scope for improved supply chain returns.	<ul style="list-style-type: none"> Mapped and priced key supply chains into key beef markets Assessed comparative market settings and value drivers Assessed scope for extracting better returns beyond farmgate. 	
Farm strategy development	Worked with leadership team of a large farm enterprise in developing and implementing a 5-year plan including capital raising & expansion.	<ul style="list-style-type: none"> Developed strategy and business plan packages Mentored critical management decisions in implementation 	

Our knowledge products

Product	What is it	Key features
Global Dairy Directions	A significant forecasting platform that provides a rolling short and long-term outlook of global dairy market in major commodity groups.	<ul style="list-style-type: none"> • Forecasts balance of trade for major dairy commodities as impacted by expected production, consumer demand, stock levels, and product mix • Enables rapid scenario development based on changing outlook drawing on our widespread global intelligence feed • Built on rolling, up-to-date global data of dairy commodity trade
Dairy Globe (& related publications)	A weekly newsletter of market and corporate developments relevant to the dairy industry.	<ul style="list-style-type: none"> • Draws on a wide range of global market and industry developments • The product is packaged for executive audiences • The platform is used for tailored packaging to several client audiences
Horizons newsletter	A free insights newsletter delivered to clients highlighting developments, trends and innovations relevant to future-shaping agendas in food.	<ul style="list-style-type: none"> • Draws on our extensive monitoring of retail and consumer trends, which affect likely future requirements of suppliers to food markets. • This is assembled into an insightful summary of trends and their impact.
Dairy Business Navigator	A decision-modelling tool designed to allow enterprise owners/investors to simulate future long-term scenarios.	<ul style="list-style-type: none"> • The dynamic tool allows users to model their enterprise over 10 years • Allows for flexibility in market prices, climate, efficiency and cost structures, as well as • Allows easy load-up of farm details and rapid analysis of outcomes
FOODmap	FOODmap platform analysed, mapped and valued various pathways to consumer markets.	<ul style="list-style-type: none"> • The package is a comprehensive roadmap of the structure of the major supply chains and distribution channels that make up the food industry. • The 2012 FOODmap update extended the earlier analysis of the dynamics affecting Agrifood value chains. • The platform is used to further articulate supply chain structures and their dynamics for a number of client engagements in specific areas and issues.
Skills development module	We packaged insights to a large client team to assist in understanding of the drivers of food sector innovation.	<ul style="list-style-type: none"> • Drew on our knowledge of influences on food supply chains at a sector level, including consumer trends, retail trends and supply chain dynamics. • Identified likely drivers of innovation and areas of strongest interest for participants in each sector.