

An aerial photograph of a green tractor with a white cab and a blue implement, moving through a lush green field. The tractor is positioned in the upper right quadrant of the frame, leaving a dark trail behind it. The field is divided into rows, and the lighting creates a warm, golden glow on the right side.

Leftfield Innovation Ltd

A social enterprise creating sustainable future foods here
in New Zealand for global conscious consumers.



Founding Leftfielders



John Morgan

Food innovation
knowledge, broad
understanding of
agri-food sector



Nick Pyke

Deep
understanding
of agronomy
and growers



Susan Goodfellow

Strategic
Development &
Project
management



Ed Butler

Understanding of
the science and
innovation sector



Patrice Feary

Profound
understanding of
consumers



Andrew Plimmer

Technology guru



Leftfield Innovation Value Proposition

New Zealand

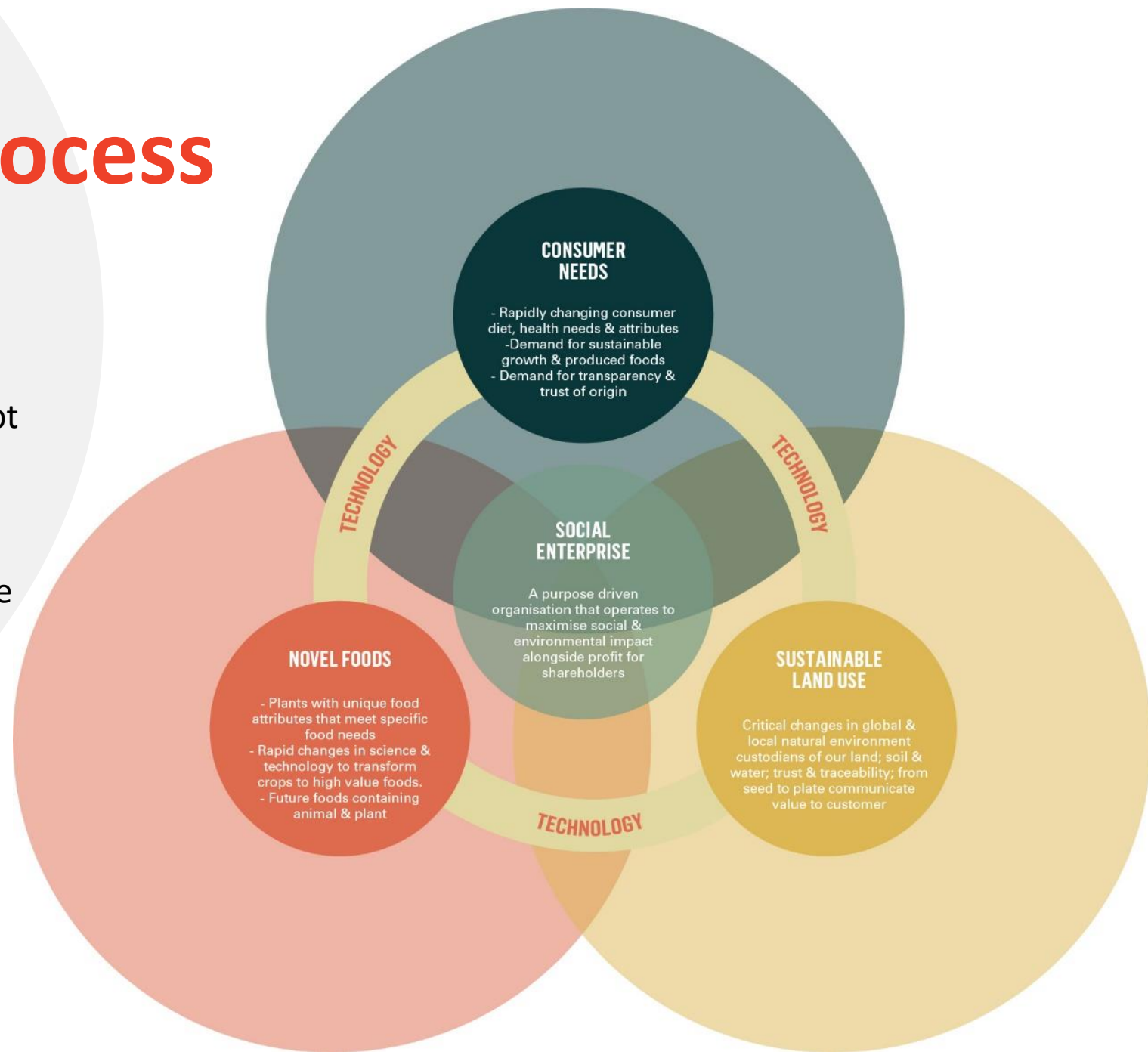
- For New Zealand
- Who is looking for a viable primary production sector delivering high export returns in an environmentally friendly way
- We provide agri food product prototype development, IP development and investment solutions
- That leverage consumer trends, and agri-land based science
- We will collaborate across the industry, unlike most participants the agri-food industry who operate in silos, independently or in competition
- Our company Leftfield Innovation has created the framework that draws together deep sector knowledge and expertise and converts it into action



Consumer led process

Leftfield – undertakes the market research, land suitability assessment, and food concept development.

Aiming for 100,000ha of sustainable land use for NZ



A phased approach

Phase 1 = Capture Value

- Raw materials
- Redesign of grower/processor relationships/partnerships;
- Provide certainty for a longer term;
- tell the provenance story – NZ grown, not just NZ made!
- Branding;

100%
NEW ZEALAND
GROWN



Phase 2 = Create Value

- Processing capability
- Transform raw materials into food ingredients;
- High value food products
- Farmer investment to secure options to grow crops for ingredients

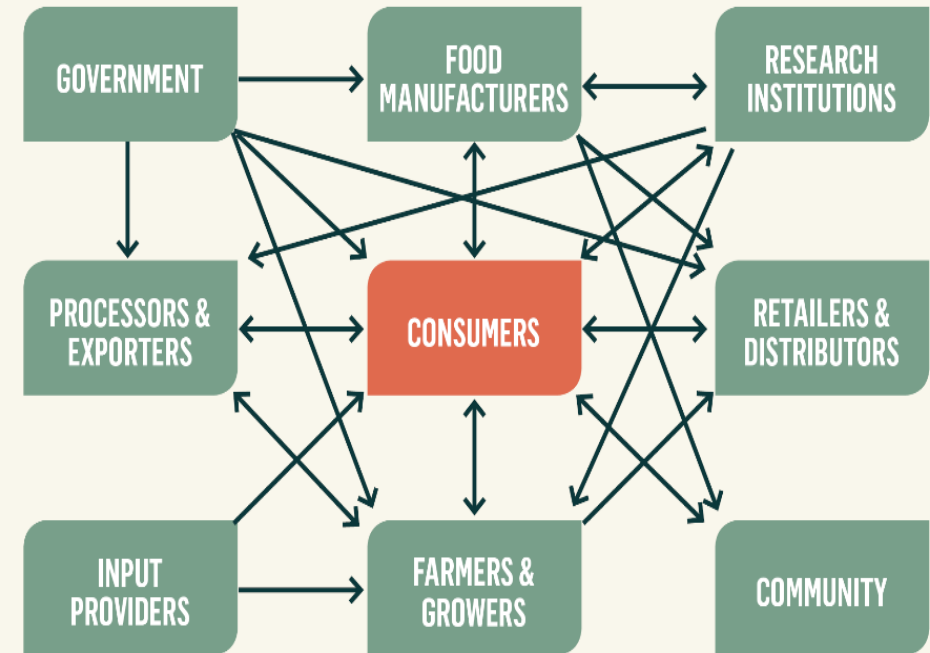
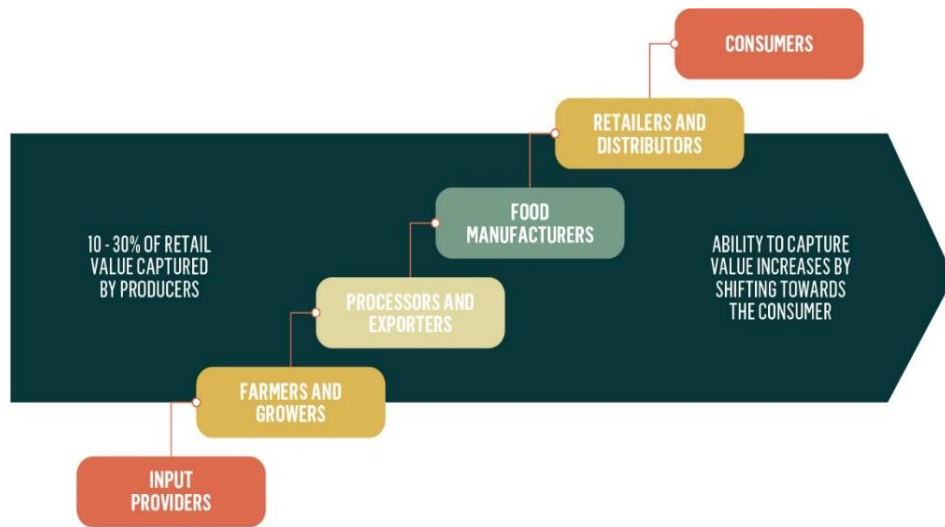


Connecting NZ Food & NZ Farmers to the World



Be consumer led from the get go

Shifting from supply chains to value webs – understanding the consumer and responding to their wants and needs is central future success



Partnering with those through the supply chain that are consumer led & wanting to share the value creation



Know your consumers, partner with those who will get to know them more intimately for you



Know your Consumers



Provenance Platform



Verification



Track and Trace



Communication Tools



Smart Labelling



Relevant export brand development



Effective export market activation

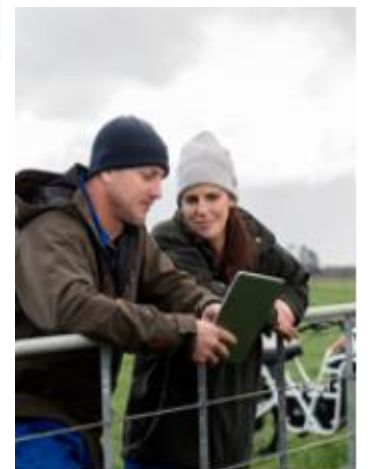


Producer led is out Consumer led is in



What's driving the market & consumers?

- NZ's need to capture more of the export value
- Country of Origin / **Provenance**
- Consumers seek to know more, focus on the attributes
- Supply Chain **Transparency**
- Adoption & utilisation of **technology** quickly
- **Channel** to market: online off line integration
- **Sustainability** is defining the farming conversation
- Hunger, obesity, aging populations, **consumers are looking to food for health**
- Changing diets, health needs and attitudes
- Alternative Proteins
- Functional Foods
- A need to strengthen NZ's food culture





The World of Food is Changing

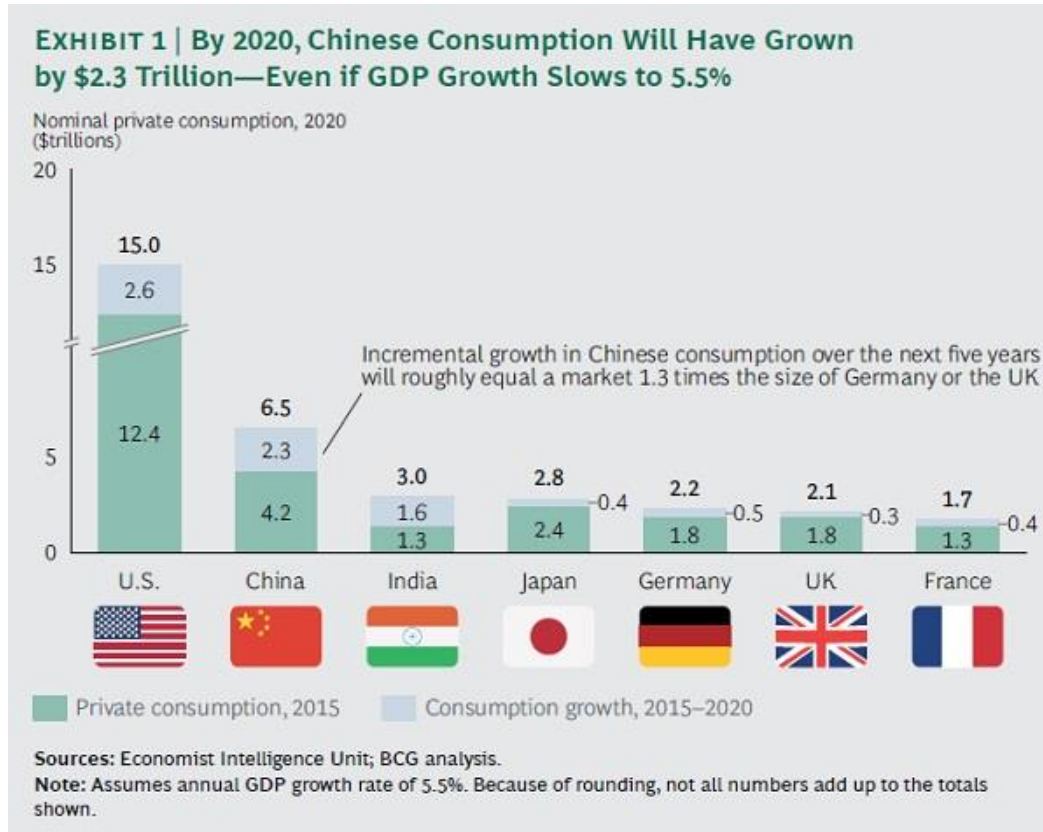


Alibaba's Hema Fresh Stores



Global Consumption

Growth



- Consumers in upper middle class and affluent households will have the most impact
- Chinese under the age of 35, who are mostly college educated and brand conscious, will lay out more cash on goods and services
- Shift from bricks-and-mortar retail to e-commerce.

Trends



The opportunity and the problem to be solved

Identify a high value mix of sustainable land uses for New Zealand farmers that will generate high value export ready products for consumers that care



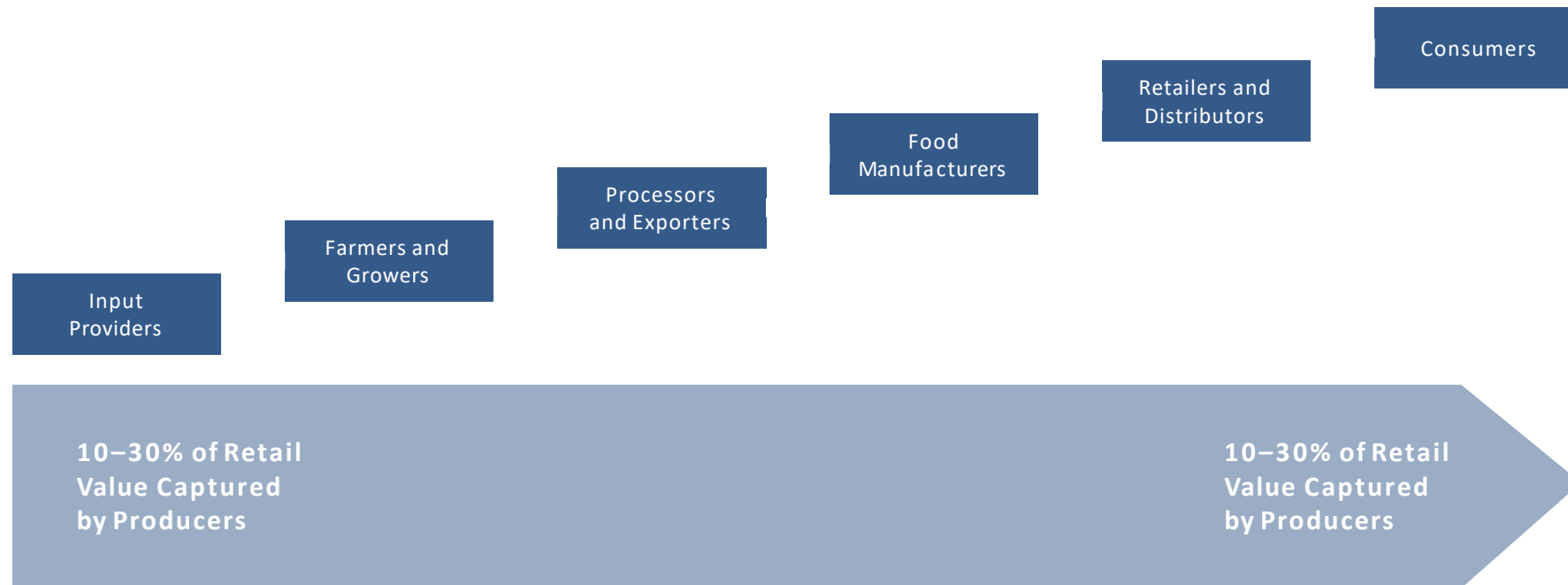
Our Challenge

We can grow many things
BUT
Someone else controls the value chain

We need to redesign the value web



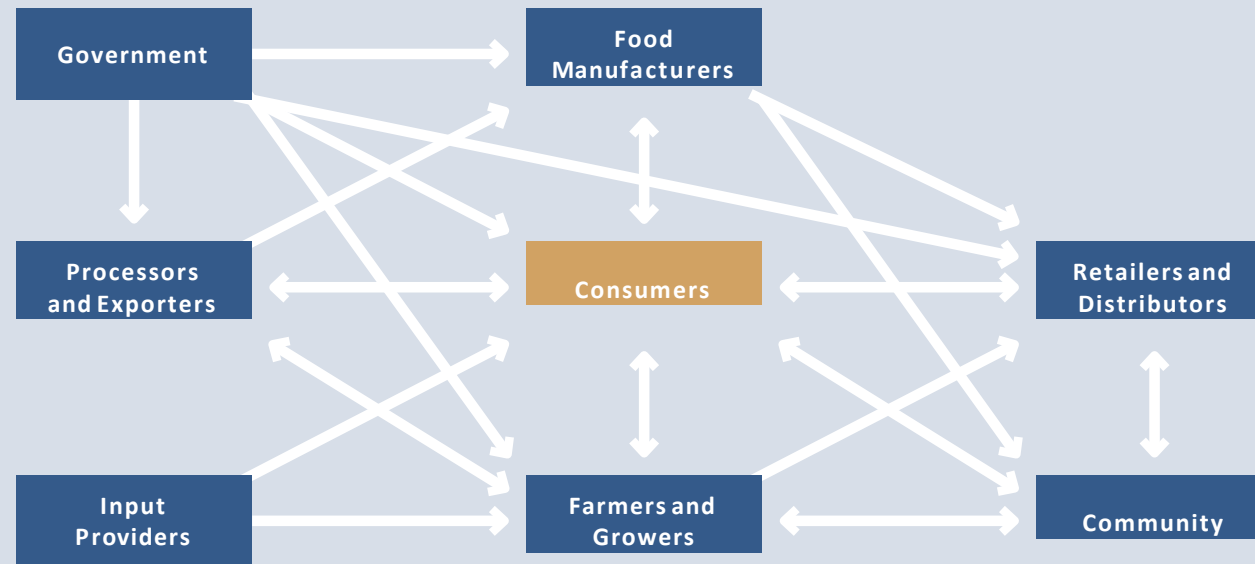
Traditional Value Chains Will Never Deliver on Our Potential



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Envisaging the Future : A Consumer Centric Value Web



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What are crops value options?

- Nutritional beverages
- Exportable water
- Grain foods (ancient grains, niche)
- High value oils
- Value in NZ flora
- Unique seeds
- Plant proteins



Land Capability

- What does a farm of the future look like?
- Now you have water – what else do you need?
- The 60,000ha farm
- The best and the worst of your farm – the 10%
- Collaborate – to get scale - barriers, opportunities
- What is the on and off-farm infrastructure needed?



Capturing Value

- Sustainability benchmarks – farm to plate traceability
- Shift from data for compliance to data for authentication of food origin – growers licence to access premium
- Blockchain – verifiable data and traceability

- Nutrient Use efficiency
- Water Use Efficiency
- GHG Emissions
- Soil Quality
- Ag Chemical Use
- Social Responsibility
- Biodiversity



Capturing Value – build on existing frameworks

- Utilising existing technology platforms to capture farm data
- Utilise existing Global Standards

