



PIRSA Scorecard

Measuring our Progress

Targets:

- Food SA Plan - \$15b gross food value by 2010
- Wine Plan - \$3.1b wine contribution by 2010
- SASP – Treble Exports by 2012/13 \$10b by the Agri-Food and Wine Sector

Presented by: Grahame Tonkin, Executive Director
Food South Australia, PIRSA



OUR PARTNERSHIPS

Industry, Government and Community Plans

South Australia's Strategic Plan

Premiers Food Council - *State Food Plan 2004–2007*

An internationally competitive food industry contributing \$15 billion to the South Australian economy by 2010

Agri-Food Sector Plans

- ***Seafood Plan***
- ***Grains Plan***
- ***Horticulture Plan***
- ***Livestock Plans (Dairy; Poultry; Sheep; Beef)***

Wine Industry Council - *Wine: A Partnership 2005–2010*

Grow the contribution of the wine industry at least \$3.1 billion per annum by 2010



The ScoreCard Approach – How?

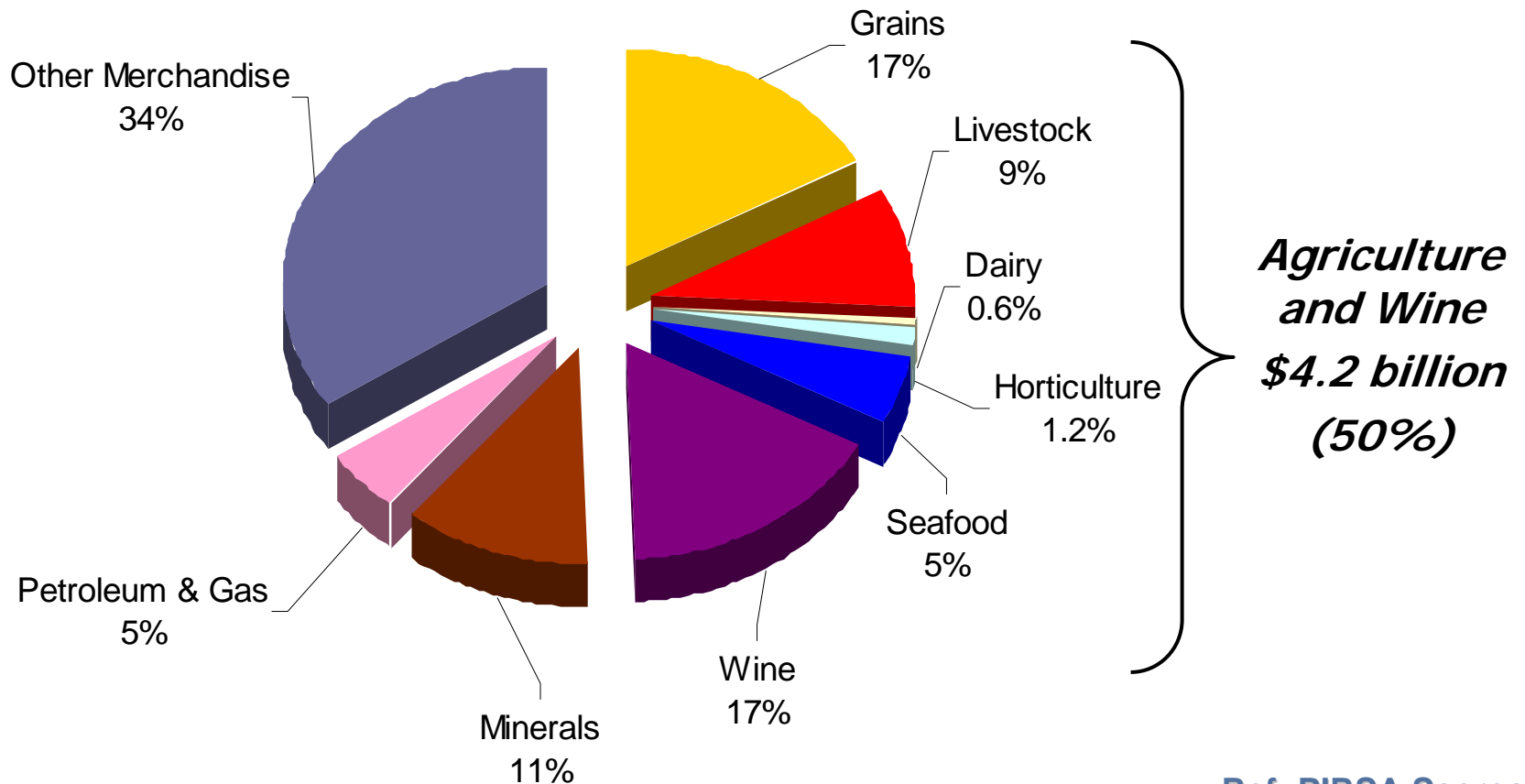
“...when you can measure what you are speaking about and express it in numbers, you know something about it.” Lord Kelvin 1883

ScoreCards introduced to:

- Measure progress over time;
- Better understand the value, importance and impact of the *value chains* from production to consumption made by an industry (PIRSA);
- Evaluate and compare sector and *regional* contributions (identify trends/opportunities)
- Assist development of industry plans & programs (A collaborative approach to strategy development).



South Australian Merchandise Exports

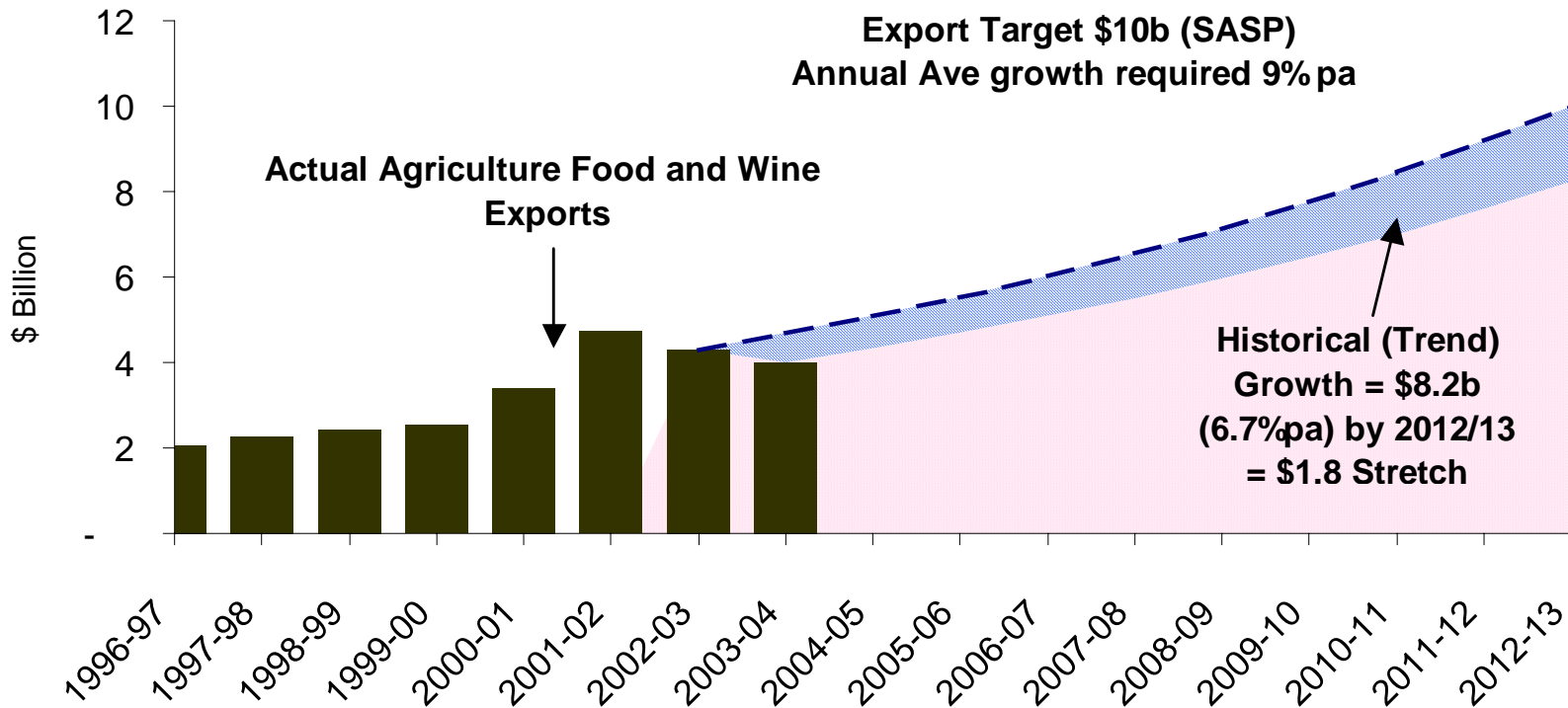




Food Plan Targets

Treble Agriculture and Food Exports to \$10b by 2012/13

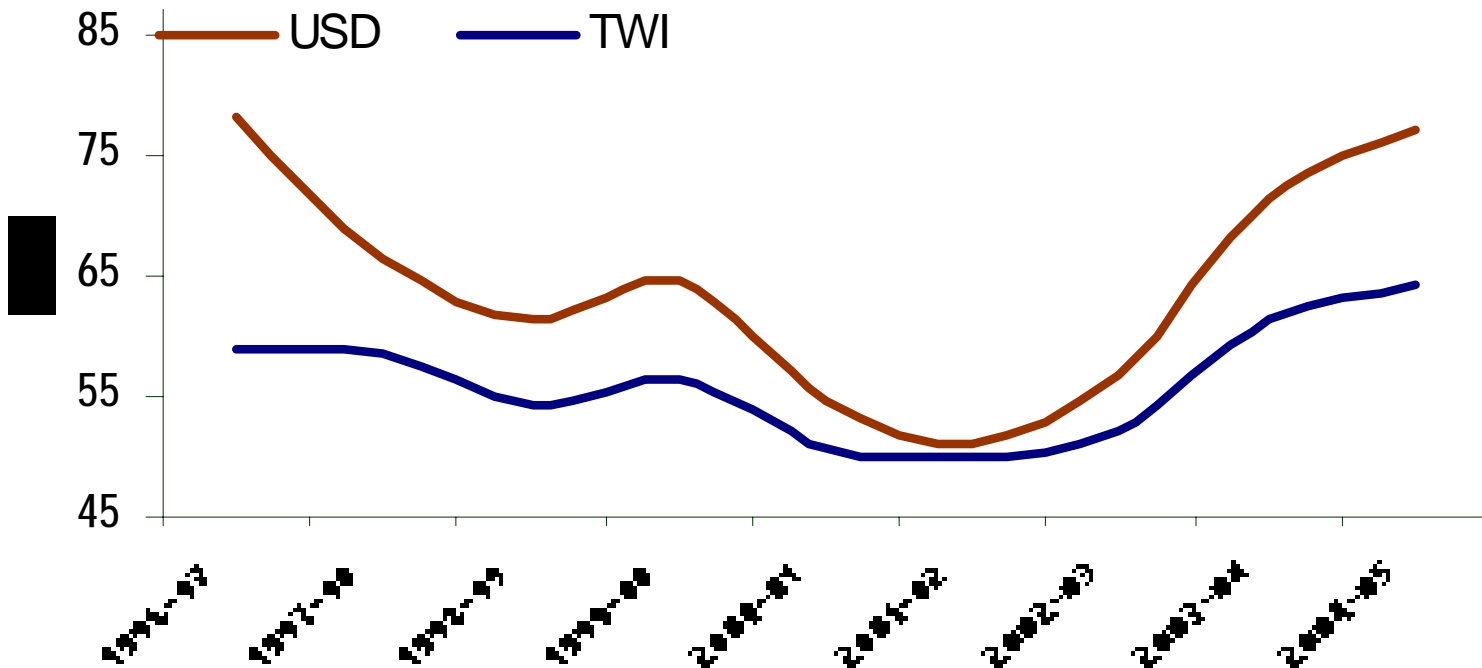
SA Agriculture and Food Exports '96-2012/13





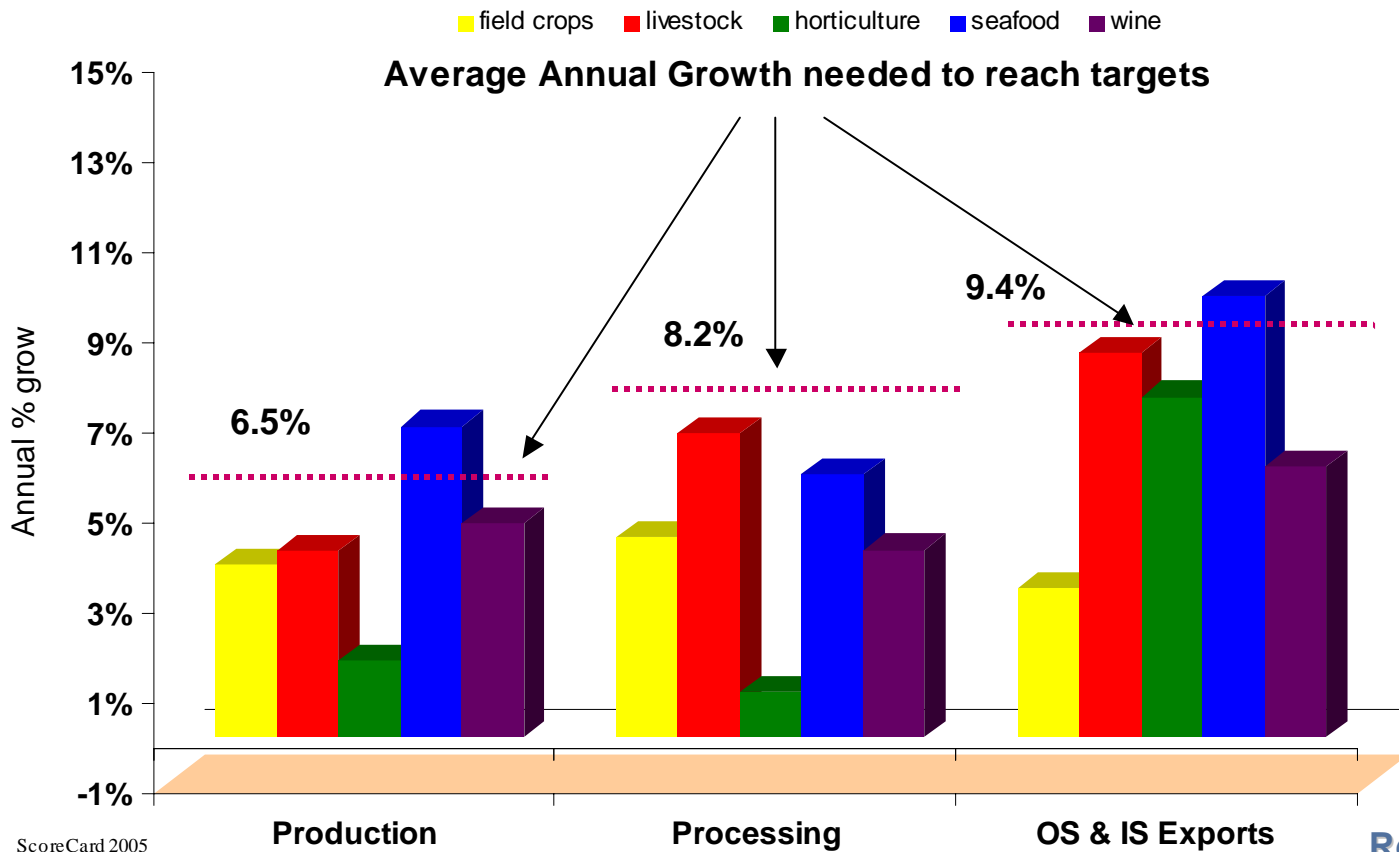
Exchange Rates, Aust \$ to \$US and TWI

\$Aus Exchange rate – 50 percent rise over last two years, 1996/97 to 2004/05





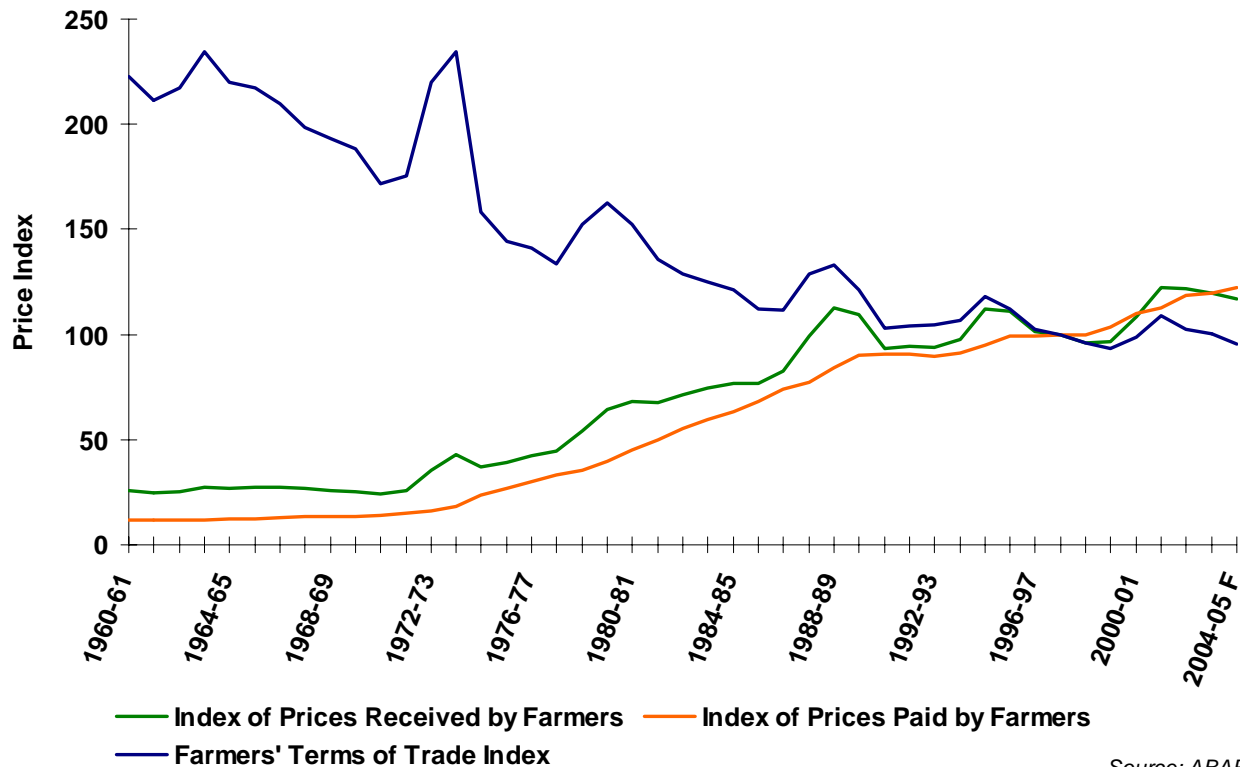
Our Export Challenge Along the Value Chain - Industry Plans & Targets





SA Farmers Terms of Trade

Farmers Terms of Trade, Input Prices/Prices Received - Lowest on Record



Source: ABARE

Ref: PIRSA Scorecard



BARRIERS

Some Associated Issues

Resources and Infrastructure Limitations

- Water quantity and quality; land and resource access; energy; transport; waste management

Industry Capability

- Skills (technical and managerial);
- Value-adding/ market focus (culture of entrepreneurship)

World Market Demand / Supply

- market access; non-tariff barriers; FTA's and bio-security
- \$A value
- Market trends – eg. traceability
- China (and India) demand and supply
- Cost of energy



BARRIERS

Some Associated Issues Cont

Structural Adjustment

- Enterprise size, structure, efficiency

Input costs

- Labour shortages/ wage costs; energy

Development Planning and Alignment

Climate Change – Global Warming

- Adaptation; mitigation of impacts



The Way Forward

Promote Industry Competition and Innovation

STRATEGY DIRECTIONS

International Market Development

- Food Market Intelligence Unit

Value-Adding and Integration

- Marine Innovation SA

Productivity Improvements (R&D&E)

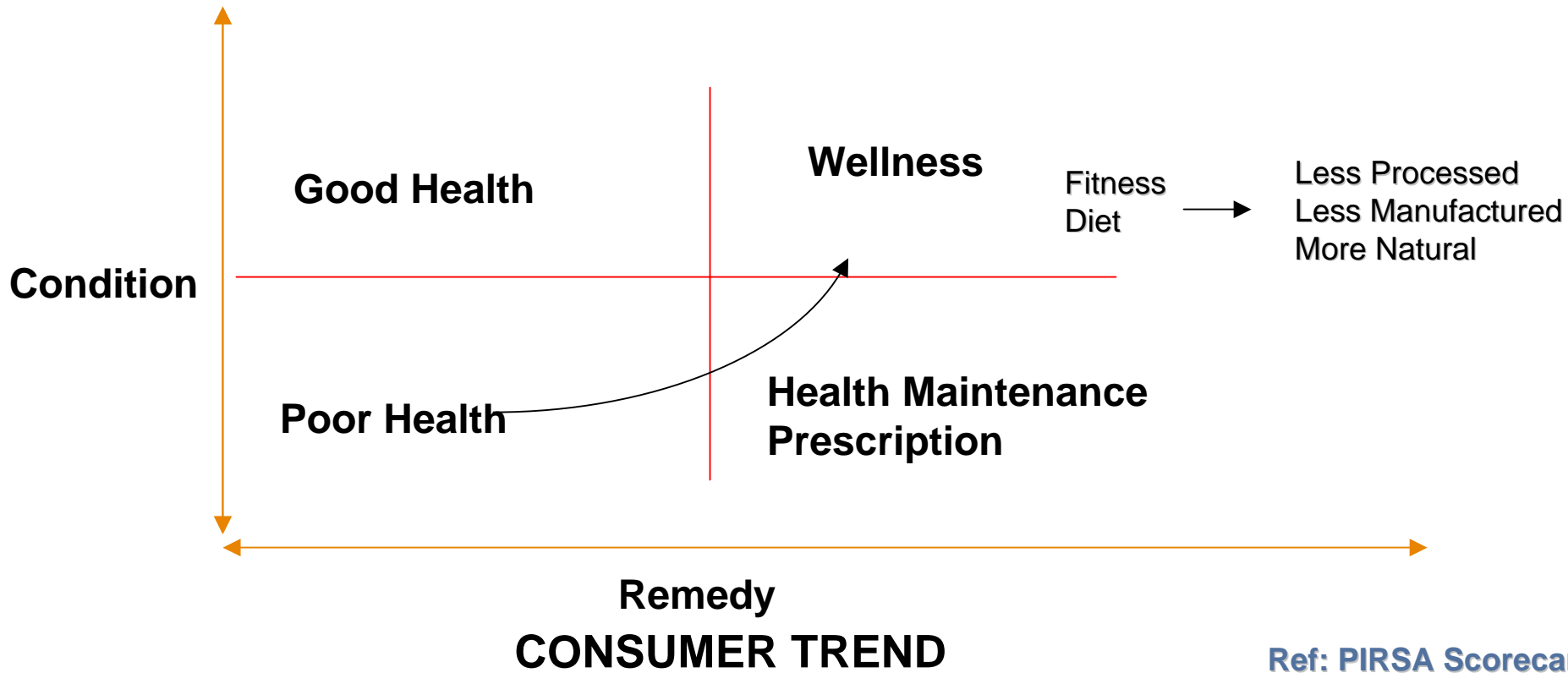
- Sustainable Farming Systems



The Way Forward

Promote Industry Competition and Innovation Cont

Food – The Market Trend





The Way Forward

Promote Industry Competition and Innovation Cont

Innovation

- Eg. Wine Innovation Cluster; Food Innovation Centre Budget Bid

Investment Attraction

Capability and Capacity Development

- Regional Food Development Officers – RDB

Sustainability

- Ecologically compatible food sources



Key PIRSA Performance Measures

Agri-Food Plan, Wine Plan, Resources Plan (Partnerships)

- Key targets as defined in Food; Wine and Resources Plans: productivity; productivity measures investment; resource security; promotion; incremental processing
- Facilitation of key projects
- Key Milestones

Industry Scorecards (monitor trends)

- Minerals, Food, Other Agriculture, Wine; triple bottom line

Policy and Program Review (Legislation)

- Eg Citrus Act; Fisheries Act; Mining Act; Barley Marketing Act.