



AgriEmerging Markets Program

Identifying Trends & New Opportunities

Information Package

Delivered by Toowoomba and Surat Basin Enterprise and Supported by Shell QGC



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Introduction

In response to growing global demand for trusted, clean and safe food, together with a significant emphasis on a sustainable supply chain including farming practices, freight logistics and market destinations the chance has arisen for Western Downs Food and Agribusiness companies to identify trend and new opportunities.

Shell QGC AgriEmerging Markets Program will give Western Downs agribusinesses the support and tools to both further develop business opportunities and understand future markets for global, ethical and environmental demands. This support will be delivered through a series of workshops and services, tailored to emerging markets in the Food and Agribusiness sectors over a twelve month period.

Shell's QGC Business

We are one of Australia's leading gas producers, focused on developing Queensland's world-class onshore gas reserves.

Located in Queensland, we produce natural gas to supply the Australian domestic market and for export as LNG via our two-train LNG liquefaction plant on Curtis Island. We produce natural gas from the Surat Basin of Southern Queensland.

We aspire to be welcomed by the communities where we operate and want to leave a lasting impact through our social investment partnerships. The AgriEmerging Markets program is just one of several projects supported by Shell QGC business to drive regional economic development.

Our commitment and strategy to accelerate the transition of our business to net-zero emissions can be found at <https://www.shell.com/sustainability/our-approach/sustainability-at-shell>

TSBE Food Leaders Australia

TSBE Food Leaders Australia (FLA) is an initiative of local economic development organisation, Toowoomba Surat Basin Enterprise (TSBE). TSBE FLA's mission is to increase the capability and capacity of food and agribusiness supply chains to better meet the demands of domestic and global markets new and existing. FLA has four pillars of service deliver for their clients:

- Promote domestic and international market awareness of the Western Downs and Surat Basin as a food and agribusiness region
- Increase cross-sector collaboration
- Build a culture of innovation across the food and agribusiness sectors.
- Acting as a central conduit for the delivery of government services.

This is achieved by bringing investment and market opportunities into the agriculture sector, as well as work with existing food producers and processors to capitalise on local and export markets. We provide effective marketing intelligence specific to the food sector while also acting as a facilitator for inbound investment to the region. Utilising the strong commercial and networking partnerships of TSBE, our commitment to linking members with opportunities, economic development through investment attraction is unwavering.





Opportunities for Western Downs Agribusinesses

Queensland's agricultural industry is a major contributor to the state's economy with the gross value of production of beef (\$5.9 billion), horticulture (\$3.1 billion), sugar (\$1.4 billion), cotton (\$1.2 billion) and poultry (\$1.2 billion).

As one of Queensland's richest areas for food production, agriculture in the Western Downs drives the region's economic, cultural and social development. Supporting a diverse range of agricultural production and processing capabilities are exceptionally technical agribusiness service companies.

Some of the emerging food and fibre industries in the Western Downs include organic and specialty crops, aquaculture, native foods, high-tech agriculture, fibre alternatives such as hemp and bamboo, small species feedlots and protected cropping.

The Western Downs is a dynamic and innovative region, and there are many opportunities for agribusiness to expand opportunities and explore new markets and industries.

About the AgriEmerging Markets Program

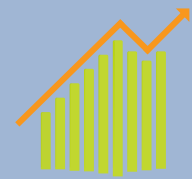
With guidance and leadership needed more than ever to meet sustainable market demands, Western Downs businesses will learn how these requirements are affecting their supply chains and how to capitalise on the value-add opportunities as well as learn about emerging industries.

The aim of the Shell's QGC AgriEmerging Markets Program is to support the development of up to ten food and agribusinesses per year, grow their business domestically, explore global markets trends and

develop products for longer term opportunities.

This support will be delivered through a series of tailored workshops, with an emphasis on emerging opportunities in the supply chain and one-on-one coaching delivered over a twelve-month intensive period, followed by a further two years support through TSBE FLA membership services. This program is for those wanting to make changes in the short term to make the right choices now for the future.

Key Program Strategies



Business Growth



Product Development



Go to Market Strategy



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Program Outline

The 2023 – 2025 Agri Emerging Markets Program is designed to complement the success already achieved in the Emerging Exporters program but with a renewed approach to building business development interests as well as help Western Downs agribusiness understand the needs of Environmental Social Governance (ESG). Guidance and leadership to the regions key agricultural commodities is needed more than ever to meet growing global and domestic NetZero market demands creating an important value add proposition.

In response to growing demand for this knowledge in the region, the AgriEmerging Markets Program will deliver:

- Guidance to the regions key food and fibre industry to meet future markets and global ethical and environmental demands
- Enable better status for future markets and global ethical demands
- Promote our regional food and fibre as the leaders in responsible and ethical agribusiness
- Fast track our food and agriculture sector to meet 2050 Emissions Reduction Targets and be the region of choice for domestic and export markets
- Targeted introductions in developing supply chains knowledge
- Work with participants in developing a strategic approach and a better understanding of the process for value-add products
- Explore processing requirements, packaging, product to market alignment, sales channel, marketing approach, transport and logistics, benefits of traceability and consumer trends
- Create access for participants to gain entry to programs that provide education to upskill and build capability
- Provide mentoring that supports an informative decision-making approach to exploring opportunities for their business.

Ongoing Support and Mentoring

TSBE FLA will provide ongoing support and mentoring to participating businesses to pursue opportunities identified through the program.

Businesses in the program will receive a 2-year silver level TSBE membership worth \$5,192/year. This will provide access to TSBE's Food Leaders Australia consultancy and regular mentoring sessions.

The AgriEmerging Markets Program will give participants the knowledge and guidance to become a competent sustainable business who can manage supply chain risks and sustainable value add opportunities.



What you can expect from the program

Successful applicants will have an appetite and drive to meet growing global and domestic sustainability market demands creating an important value add proposition. They will be adaptable, well organized and committed to meeting the changing supply change landscape. The first step in this process will be to understand why the sustainability piece has become so important and how it is impacting all businesses across the globe and how your business needs to adapt.

This will include understanding the language, learning new terms and concepts that will underpin future markets requirements.

Participating in Shell's QGC AgriEmerging Markets Program will provide you with these skills at the same time, introducing and exposing you to the broader supply chain needs and obligations. It will be an interactive program designed for participants to contribute and grow their knowledge with the aim of positioning your business for market growth in preparation for 2030 and beyond.

Information Gathering



- Stakeholder Engagement and Community consultation
- Targeted Information sessions
- Expressions of Interest (EOI) selection process
- Engage widely and provide opportunity for up to 10 successful applicants
- Targeted Product and Value Chain Research

Business Growth



- Conduct analysis of individual business to ascertain current position, structure, available skills, and capability to develop highlighted value-add products

Product Development



Develop and run education program incorporating:

- targeted 2 to 3 day intensive workshop program
- workshop covering high level overview of ESG
- assist to establish peer-to-peer advice

Go to Market Strategy



- Develop marketing plan
- Provide ongoing support

Building Networks



Some of the best learnings will come from the group networking opportunities. Participants will be introduced to the wider sustainability community including industry experts, peak industry bodies, peer leaders, trusted consultants and key supply chain advisors.

Access to Support

Participants will receive information on state and federal government grants and additional support initiatives.

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Your Program, Your Future

This program has been designed to increase your knowledge of value-add opportunities in the supply chain and help you reposition your business on its 2030 pathway. A commitment to ongoing market growth and an aspiration to explore alternative supply chains and market destinations is required to underpin the success you achieve through the program.

The interactive nature of the program will ensure that participants reach business growth milestones along the way including completing your sustainability plan and/or developing a sustainable supply chain matrix.

Commitment to the program may entail:

- participating in workshops with fellow participants for the duration of the program
- participating in events and media opportunities to promote the program and outcomes for the duration of the program (this may require being photographed, filmed, giving quotes and participating in events in SE Queensland and overseas)
- making financial commitments to your business growth and looking at what sustainability means for your business (part of your learning will be participation in a proposed education trip abroad)
- providing updates about your business's progress towards domestic growth and your NetZero readiness.

Selection of Businesses for the Program

Selection will be based on information provided on the Expression of Interest form, during the phone interview and in the application process.

Please carefully consider how you are going to present your business during the application process.

Final selections will be made following a consultation process between TSBE FLA and Shell's QGC Business representatives.

Businesses will be selected to participate in the program using the following selection criteria (see over page) which aims to ascertain your level of commitment.



Selection Criteria

Demonstrate Viability

- Current market presence
- Financial capability
- Production capacity and sustainability
- Good corporate governance
- Agribusiness must be in the Western Downs or nearby surrounds and able to demonstrate that 70% of business resides in the Western Downs

Demonstrate Commitment

- Commitment for the life of the program
- Attend and participate in workshops, education trip and other events or activities undertaken as part of the program
- Involvement in media promotion of the program including photography and videography, providing quotes
- Cover costs of participation in an overseas study tour (TBC)

Demonstrate Willingness

- Collaborate with other producers to participate in supply chain development to meet your sustainable market needs if necessary
- Develop your NetZero strategy and business plans

Demonstrate Vision

- Why is sustainability and NetZero is important to your future business strategy?
- What are your expectations of the program?

You will be asked to provide supporting information and documentation on and about your business to validate your answers.

All information provided will be treated as confidential and will only be used for the purposes relating to this program and will not be shared with any other representatives or organisation without the written permission of an authorised business representative.



How to get involved

The AgriEmerging Markets Program is for those wanting to make changes in the short term to make the right choices now for the future. The program will provide support for a small group of up to 10 capable businesses and take them on the sustainable supply chain journey over a twelve-month period.

Through TSBE FLA membership, as part of the program, on-going support will be provided for the following two years.

We are inviting interested food and agribusiness companies from the Western Downs and surrounds to indicate interest in participating in the program through a formal Expression of Interest. Please follow the key program dates to understand your deadlines.

Key Program Dates

Expressions of Interest Open (20th March)

Emerging Exporters/Emerging Markets Program Dinner (18th April)

Information Sessions Dalby, Chinchilla and Miles (19th/20th April)

Expressions of Interest Close (30th May)

Application Assessments and Interviews (May)

Approved Applications Announced (June)

Program Launch (13th July)

Educational Program (August/September)

International Study Tour (TBC)

Ongoing Support (until July 2024)

Expression of Interest Form

Thank you for your interest in participating in the AgriEmerging Markets Program.

Please complete and return to rowena@tsbe.com.au or mail to PO Box 658, Toowoomba 4350 before April 30, 2023.

Submitting this form does not guarantee a place on the program.

ABOUT YOUR BUSINESS

Name: _____

Position: _____

Trading name: _____

ABN: _____

Email: _____

Website: _____

Business Address: _____

Please provide a short description of your business:

How long has your business been operating?

Years _____ Months _____

Number of employees?

Full Time _____ Part Time _____

Provide a brief description of how important you think sustainable supply chain management is to your company's long-term success?

How do you plan to incorporate the knowledge and skills gained from the program into your company's supply chain management practices?

YOUR WILLINGNESS TO PARTICIPATE IN THE PROGRAM

I understand that participation in the program may require:

- Willingness to commit time and resources to participate in a sustainable supply chain education program.
- Participating in workshops with FLA and the other successful program participants for the duration of the program.
- Participating in events or other media opportunities to promote the program and outcomes for the duration of the program.
- Making financial contributions to participate in the proposed overseas education trip.
- Providing information about the progress your business has made towards a sustainability plan.

YOUR EXPECTATIONS FROM THE PROGRAM

Why are you interested in the program and what are your expectations of the program?

What benefits do you expect to gain from participating in a sustainable supply chain education program?

Signed _____

Date _____

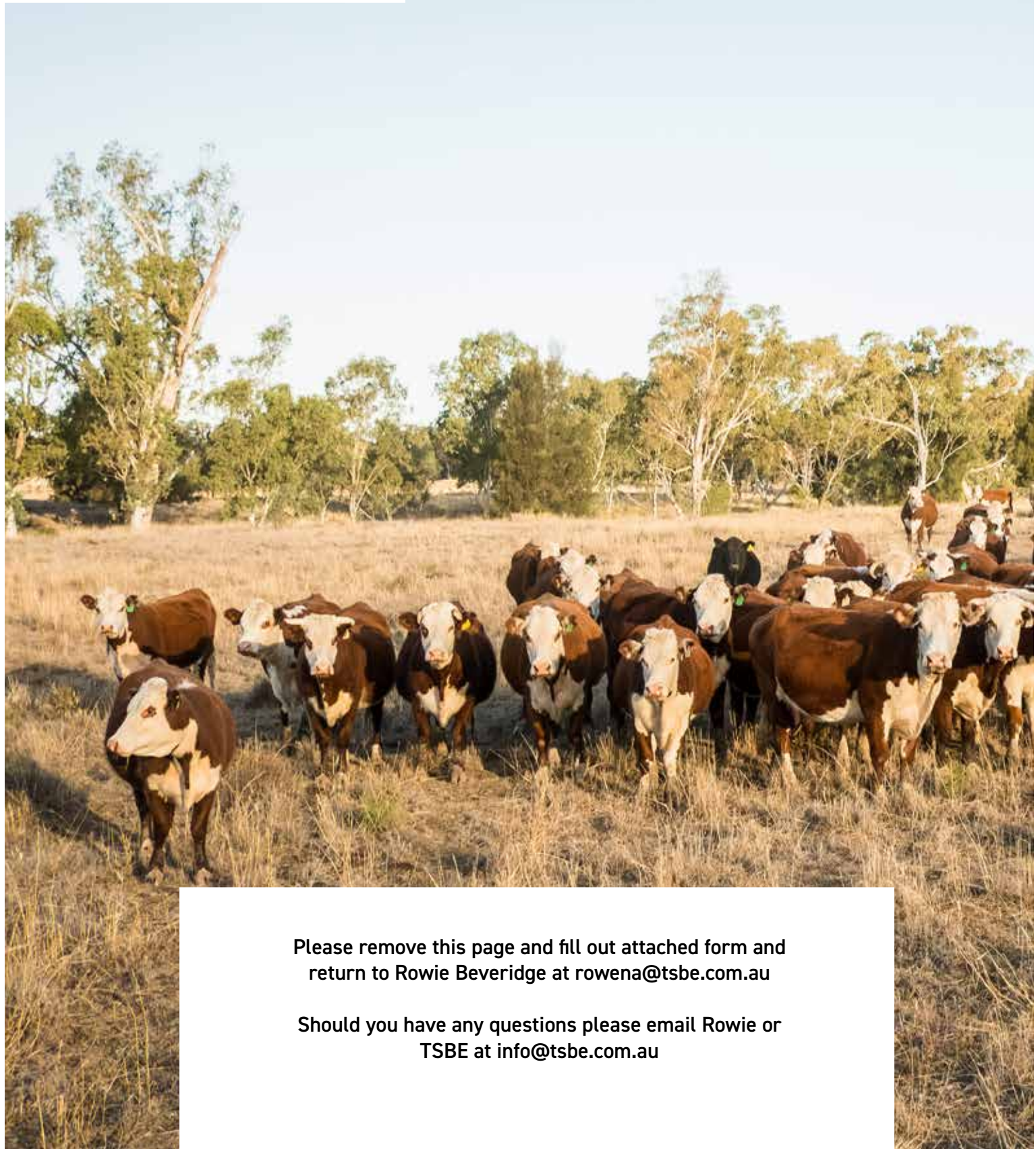
PLEASE NOTE

Rowie Beveridge, Agribusiness Development Manager, FLA, will respond to discuss your interest and any questions you may have about selection criteria and to set an interview time.



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Please remove this page and fill out attached form and return to Rowie Beveridge at rowena@tsbe.com.au

Should you have any questions please email Rowie or TSBE at info@tsbe.com.au

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Rowie is the Agri-Business Development Manager at Food Leaders Australia - a role that assists agri-business in progressing value add products, helping establish go-to-market strategies and developing supply chains through to market. With more than 25 years of agribusiness experience in cotton, grain, livestock and horticulture, Rowie has a well-rounded and practical understanding of identifying genuine opportunities and benefits for producers in the food and fibre industries.





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