

Deloitte.

Deloitte Africa
Agribusiness Unit (DAAU)
Grow and prosper





With a globally connected network of member firms in more than 140 countries and approximately 170 000 professionals, Deloitte brings world-class capabilities and deep local expertise to help clients succeed wherever they operate

Complementing our international status, Deloitte has the largest professional services footprint in Africa, with more than 5 000 people in more than 28 African countries, and over 200 cumulative years of agribusiness experience across Deloitte member firms.

Our collaborative approach places subject matter specialists and dedicated senior resources from our member firms on each client project. Regional and local offices enable Deloitte employees to gain extensive knowledge of local trends and gives them easy access to various experts with international benchmarks across the globe.

In addition to our access to international Deloitte experience, we are able to provide real-time, on-the-ground advice through a network of outside agricultural specialists such as farmers, industrialists, manufacturers, marketers, agricultural economists, and trainers.

Furthermore, Deloitte's multi-disciplinary approach enables clients to achieve multiple increases in yield, productivity and value. Our team members understand the complexities of doing business in Africa and have extensive experience throughout Sub-Saharan Africa, particularly in the ECOWAS, SADC and COMESA blocks, allowing a thorough understanding of risks and challenges relevant to Africa, such as:

- Theft, labour instability and negative government intervention
- Land tenure challenges caused by potentially inappropriate land reform policies throughout Africa
- Lack of practically implementable business and feasibility planning as well as the sourcing of properly structured funding of agricultural and agribusiness opportunities
- Management and marketing skills shortages which work better through syndications with other producers
- Exchange rate fluctuations which should be hedged with forward buying to minimise risks
- Adoption of GMO and other new technologies like transgenic seed
- Channelling of funds through credible organisations or institutions to attract and efficiently handle investment funding
- Lack of professional systems or entities to ensure transparency and good corporate governance



Deloitte - trusted advisor in agribusiness

Deloitte Agribusiness has established itself as the preferred service provider in a number of industries where agriculture plays a role through successful completion of large scale projects pertaining to current trends in Africa, such as:

- The irrigation, improvement, and exportation of primary agricultural products
- The production of high-value crops, such as a variety of nuts like macadamias, pecans, walnuts and pistachios
- Maximisation of agribusiness opportunities in Africa, including the evaluation of natural and other production resources for the production of higher-value products, the dimensioning of projects employing the latest technologies for production and processing, and providing complete marketing information and strategies. Supply of advanced management systems and people by Deloitte is an important component of a successful agribusiness operation.
- Food and water security for individual countries, taking into account the specific needs and their production potential
- Supply of advanced techniques and production materials to help attain competitive advantage
- Investment to facilitate supply to Asia, with commitments in terms of take-off agreements and financing
- Exploitation of export markets as a basis for the design and implementation of specific projects
- Supply of a range of products produced under conditions certified to comply with the prescriptions of organic and other health foods
- Value-adding processes such as further processing of primary agricultural products into high-value consumer products like breakfast cereals, snack foods, and meat products like luncheon meats, salami, polony, gammon, delicatessen sausage and smoked meats, also traditionally exclusive South African delicacies, which can all be done at farm level to maximise transport efficiencies.

Additional expertise

Crop production	Animal and fish production	Tourism	Agricultural research and training in the following:
<ul style="list-style-type: none"> Annual field and cash crops - wide range of crops under rain fed or irrigated production Perennial crops, namely fruits (tropical and industrial crops), nuts, tea, coffee, oil palm, coconuts, herbs and spices Fodder crops (lucerne, grass) Plantations (timber, bio-fuels, pulp and fibre) Vegetable oils Conversion of bio-mass into vehicle fuels, animal feeds, electricity and building panels Flori-culture Ornamental plants (flowers, house and garden plants) 	<ul style="list-style-type: none"> Livestock - extensive to intensive systems for cattle, goats, sheep, pigs and dairy Poultry - eggs and broilers in intensive and free range conditions (chickens, ducks and geese) Game farming - breeding, conservation, trading and lodges Aquaculture - table fish, herbivores (tilapia) and omnivores (catfish) 	<ul style="list-style-type: none"> Eco-tourism on game farms, combined with environmental conservation initiatives Agro-tourism, namely working or leisure holidays Educational tourism for scholars and students 	<ul style="list-style-type: none"> Extension services Capacity building Manufacturing, supply and demand management Land reform systems

Deloitte member firms serve:

- 75 percent of consumer businesses in the Fortune Global 500®, including:
 - 23 of the 29 consumer products companies
 - 9 of the top 10 retailers
- All eight of the consumer products companies in the FTSE 100
- Four of the world's five largest brewing companies
- Three of the world's largest wine and spirits companies

Deloitte's capabilities



To assist clients with the multitude of challenges they face when embarking on an agriculture project, Deloitte has compiled a number of solution sets to guide clients through their journey.

Solutions are tailored to address each African country's specific challenges and are based on a clear understanding of both the industry and the relevant country's strategic objectives

Emphasis is placed on building relationships with key government officials in each country, which enables Deloitte member firms to provide clients customised, highly informed guidance and advice.

Our model is based on collaboration between Deloitte offices in the many African countries shown on the following page. Deloitte South Africa typically takes on the project management role and provides senior industry professionals, while local Deloitte Africa offices address the country-specific regulations and requirements that must be met.

Deloitte footprint in Africa





In fulfilling our objectives of providing clients with the high-quality integrated solutions that address their needs, Deloitte offers the following agribusiness advisory and strategic services:

- Positioning advisory (geographical and competitive)
- Production advisory (high-value products such as export fruits and vegetables, and value-adding through leading-edge technologies, such as increasing the shelf life and retail value of fresh products by several weeks)
- Marketing (access and penetration for domestic and export purposes, as well as branding, brand valuation and marketing strategies)
- Operations and logistics (project integration, cold chain and other preservation methods, speed to consumer and supply chain optimisation)
- Finance (corporate finance, planning and monetary control, access to finance, deal structuring and credit strategies)
- Value chain analyses (farm, and farm-to-fork)
- Channel strategies (franchising and direct store distribution)
- Feasibility studies (due diligence on all production factors, including sensitivity and risk analyses)
- Infrastructure (both physical and technical)
- Land reform, community studies, facilitation and capacity development
- Trade Promotions Management (TPM)
- Corporate and Indirect Taxation Advice
- Transaction services, and Mergers and Acquisitions
- Audit and Enterprise Risk Management Services
- IT Strategies and Architecture
- CXO Certification
- Sarbanes-Oxley Compliance

Why Deloitte?

Deloitte has been privileged to assist various Ministries of Agriculture, Trade, and Industry with the future development of their agricultural and agribusiness sectors. Our network of specialists extends from agribusiness industry development, global and African market access, produce prices, and markets solutions, to livestock, aquaculture, poultry, fruit and vegetable enterprises, grain and oil seed industry solutions.

Furthermore our involvement in major global consumer business organisations such as the Consumer Goods Forum reflects our industry leadership and commitment to the agribusiness space, and has allowed us to secure an impressive client base and successful completion of a number of large-scale projects in Africa.

Deloitte's global client base

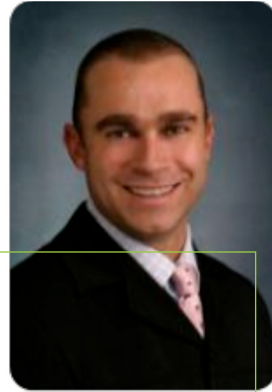
Anheuser-Busch Inbev
Carlsberg
China Resources National Corporation
The Coca-Cola Company
Danone
Dean Foods
Grupo Bimbo
Grupo Modelo
Japan Tobacco
Kraft
Nestle
Provista Agriculture Ltd
Saskatchewan Wheat Pool

Relevant project experience includes:

- World Bank Nigeria Rural Agro-Industrial Development Scheme (RAIDS)
- Nigerian Agricultural and Rural Management Training Institute Design - World Bank
- Botswana Agricultural Hubs Feasibility Study - ComSec
- USAID/Niger Rural Financial Sector Assessment
- Uganda Rural Cooperative Bank Restructuring
- USAID/Malawi Rural Finance Program
- CIDA/Ghana Northern Region Rural Integrated Program II
- Ethiopia Rural Credit Study
- CIDA/Ethiopia Southern Region Rural Water Supply and Sanitation II Project
- Ethiopia Beverage Sector Restructuring and Privatisation Assistance
- USAID East and Central Africa AGCI Global Competitiveness Hub (SPS AGOA Exports to US; Fancy foods trade fair; Food Labeling)
- Feasibility Study of Diyatalawa Farms: South Africa



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