Creating Value at a Commodity Level "I want to make a FUSS."

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Executive Summary

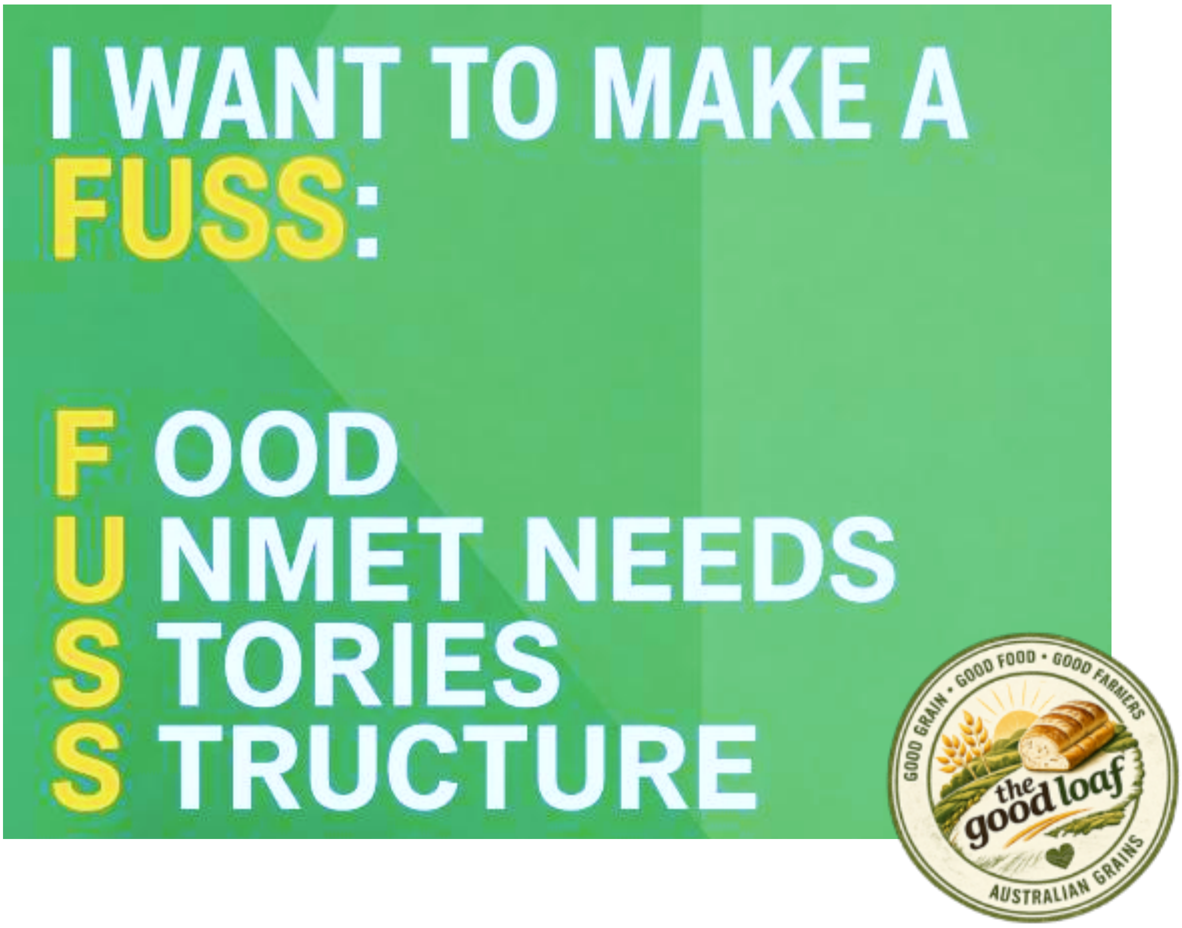
Markets around the world are full of examples where someone has broken away from the commodity price, set by supply and demand, and created value above this pricing model.

Value creation is achieved by solving a value gap created by an unmet customer, or consumer, need.

Consumers form a connection to the food they eat, not the agricultural commodities behind this food.

Typically, this connection is made through storytelling that is consistent, discoverable and focused on supporting consumer's belief systems.

For an industry to successfully create consumer driven demand it requires a structure that allows it to tell stories that connect to the consumer.



This report does a deep dive into a few of the case studies that helped me to cement my thoughts around value creation.

I offer recommendations for how the Australian grains industry can create this additional value for its producers.

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I had the good fortune of being connected to Linda on two previous occasions. The first time was when I was a participant in a Rabobank Global Masterclass. 39

The second time was when GIWA engaged Linda to run a workshop around Social Licence in agriculture. 39

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Foreword

Figure 1. Aspects of connecting our farm to the consumer. (Source: Author)

I farm in Narrogin in the Great Southern region of Western Australia with my wife Jo.

We run a mixed farm of sheep, grains and hay in a reliable farming region receiving an average annual rainfall of 400mm.

I trained and worked as an accountant, came back to the farm in the mid-1990s and then did a 10-year apprenticeship with my father Darrell, who was a business-focused and innovative farmer.

Once married, Jo and I expanded our land holdings in the early 2000s which was followed by a significant lift in land values in a very short time.

This meant that our return on investment had basically halved, and our response was to explore how we could become more intensive in our farming systems.

In 2009 we focused on quinoa production. We joined forces with our friend and agronomist Garren Knell, and fellow farmer Megan Gooding. We launched our quinoa product under the “Three Farmers” brand.

This was a difficult journey as a startup. We tackled the challenges of growing a summer crop in winter, with no way of processing it and no agronomic support outside of our own trials.

We trialled over 1000 varieties and basically started our small industry from three plants that we successfully grew.

Securing a Coles Nurture Fund grant was the catalyst for us to build a processing plant, as we had no options to outsource processing.

Then in 2015 we pitched our product to Coles supermarkets.

Figure 2. Garren Knell, Megan Gooding and Ashley Wiese "Three Farmers Quinoa" product release in Coles Supermarkets 2015, (Source: Author). Australian Made Logo (Source: Australianmade.com.au).

This was one of my greatest ever learnings.

The Coles headquarters is in Melbourne and is affectionately known as the Beehive. Anyone can book a 20-minute slot with a buyer and give a "shark-tank" pitch of their product. The ground floor is a ring of glass offices surrounding a central café and small deli.

"3 Farmers" was fortunate to form a partnership with a Melbourne-based food packager Annex Foods. Kane Fetterplace from Annex Foods had previously been a buyer for Coles supermarket. We went into that meeting with one goal and that was to make life easier for the Coles buyer. As Kane explained, this buyer had 2400 spots to fill on shelves in his grocery category. He didn't want to waste 20 minutes of his year talking about one bag. And he certainly didn't want to waste time considering why he would replace a like-for-like product on the shelf.

His big problem was the introduction of the 100 per cent Australian labelling, and his current quinoa was imported. Using our association with Annex Foods we packaged our offering up with a basket of other grocery products to make his life easier.

Consequently, solving this problem resulted in us being successful in getting our product into Coles. This experience had been a shift for me.

As a farmer I had always focused on selling our grain, now I was thinking about solving someone's problem.

Although the quinoa experience has been a challenging one, forming a connection along the supply chain has been incredibly valuable as we have now explored adding value to the oats, which is the main commodity produced on our farm.

Recognising in 2016 that all Wheat-Free Oat products in Australia were imported, we presented Coles with our Australian produced Wheat-Free Oat product. Our product, under the "Red Tractor" brand, has replaced imported products in Coles and Woolworths and is now the best-selling product in the Woolworths Health Food Isle for two years running.

(Information provided by K Fetterplace. Personal Communication. 2025).

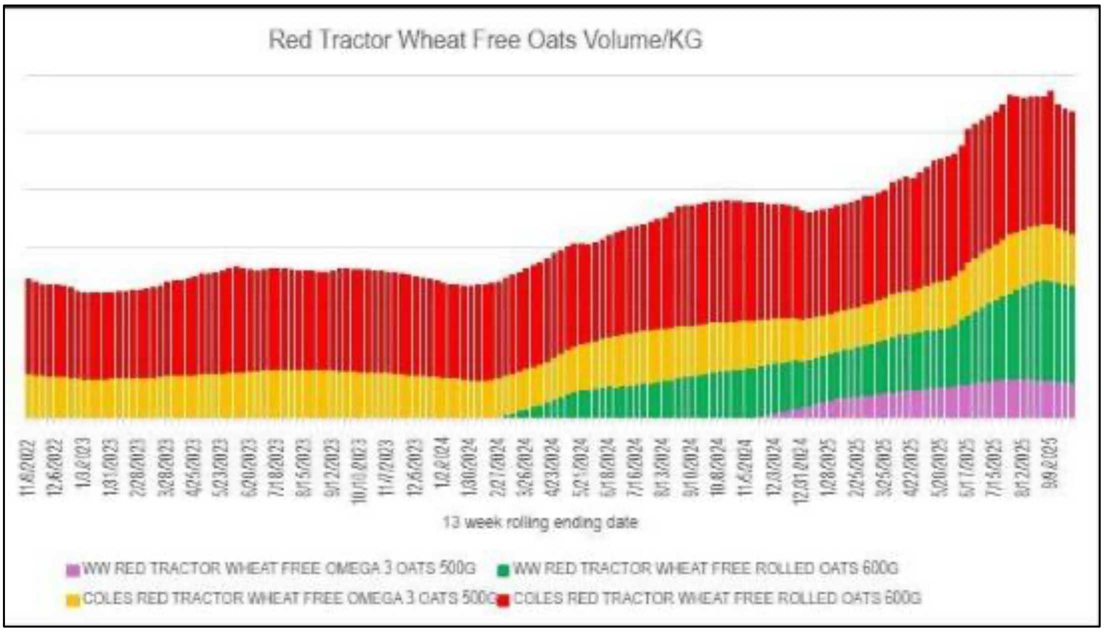


Figure 3. Sales of Wheat-Free Oat products (Source: K Fetterplace. Personal Communication. 2025).

And the consumer loves it:

Figure 4. Social media posts (Source: Annex Foods).

Over the last decade we partnered with my cousin, local farmer Tim Wiese, to form a relationship with Seamild, the largest oat processor in China. Seamild is a family business with over 300 million customers.

We are Seamild's "Exclusive Australian Farmers", and we help the company with its storytelling.

Seamild has the challenge of convincing its Asian customers that it has an authentic supply chain out of Australia. We have a genuine relationship with Seamild where we supply our oats, via a port-based container packer, directly into its Chinese supply chain.

Each year Seamild brings customers to our farm to demonstrate just how genuine this connection is.

Figure 5. Seamild founder Mr Xie meeting with Tim Wiese and Ashley Wiese on the Author's farm in Narrogin Western Australia in December 2024. (Source: Author).

Seamild is Western Australia's largest oat customer and has brought tremendous value to our industry. In 2025 Australian Export Grain Innovation Centre (AEGIC) reported that the unit value of Australian oats imported into China is higher than that of Russian Oats. "About US$100 per tonne higher, averaged over the last 5 years" (Source: AEGIC Oats Global Review: Production, Use and Trade April 2025.).

My passion for this topic comes from the rewarding journey Jo and I have had which has allowed us to build connections along our supply chain, all the way to having products on the shelves and (to the embarrassment of my family) having the best conversations with consumers in supermarkets who have just chosen to buy one of our products.

Creating Value at a Commodity Level.

It also stems from my involvement with the Grain Industry Association of Western Australia (GIWA) and Grains Australia and seeing the value we have created within the Australian oat industry.

I have always enjoyed being involved in the Australian grains industry and currently Chair the Grains Australia Oat Council, Deputy Chair of the GIWA Oat Council, on the Steering Group for the Grains Sustainability Framework (GSF), and the Western Australian Grains Strategy 2035+, a Board Member of GIWA, a committee member of the Processed Oats Growth Partnership, a past Chair of the Grain Pool's Producers Council, and a past Chair of the Co-operative Bulk Handling (CBH) Growers Advisory council.

I believe that we can create value at a commodity level.

Figure 6. Graphical illustration of travel undertaken during my Nuffield year. (Source: Author).

Table 1. Travel Itinerary.

Travel Date	Location	Visits/Contacts
Contemporary Scholars Conference 9–16 March 2024	Brazil Mato Grosso do Sul	Brazilian Agricultural Research Corporation (Embrapa) JBS Brazil Sapé Agriculture RAR Agroindustria Carraro GDM Genetica
Global Focus Program Week 1 4 August – 10 August 2024	New Zealand Auckland Tauranga Taupo Napier	Jurassic Ridge Winery James Allen – Omaka Dairy Farm/Dairy New Zealand Simon Cook – Zespri International / Kiwifruit Breeding Centre / Trevelyan's Kiwifruit Packhouse Andrew Cridge – Scion Forestry Research Ctr

		Kylie Leonard – Fonterra Reporoa Site Rachel Baker – Rockit Global Ltd / Global/Askerne Estate Winery Lochinver Station Rangataki Station
Global Focus Program Week 2 11 August – 18 August 2024	Canada Toronto Nova Scotia	Crosby Devitt – P&H Milling Group Bay Area Restoration Council Summit Station Dairy Lauren Parks & Josh Oulton – Just Us! Coffee/Woodside Cannabis Harbour Corner Lobster/Noggins Corner Farm/Taproot Farms/Hutchinson's Sugar Bush Van Dyk Blueberries/Halifax Farmers Markets
Global Focus Program Week 3 18 August – 25 August 2024	United States of America Nebraska	Scotts Bluff National Monument Western Sugar 21st Century Ag John Deere Strategy Feeders – Bison Feedlot Flying Diamond Ranch Darr Feedlot Dekalb Cornseed Production Facility University of Nebraska-Lincoln
Global Focus Program Week 4 26 August – 31 August 2024	Kenya Athi River Nanyuki Mount Kenya	International Livestock Research Institute AusQuest Farms Insectipro Sunripe AgVenture Kisima Farms Blackbeard Shamba Kakuzi Farms
Global Focus Program Week 5 1 September – 6 September 2024	Northern Tasmania	Rosemount Ag Ashby Merinos Tasmanian Berries MG Farms Macquarie Oils Tas Drone Solutions
Individual Travel 8 June – 18 June 2024	New York State – Ohio USA	Phil Trowbridge, Trowbridge Farms, Ghent NY Certified Angus Beef, Wooster Ohio Linda Weber Eatherton, Fractional CCO
Individual Travel 19 June-18 July 2024	UK	Chris Green, "Just Oats" consortium. Tom Ery, Senova Groundswell 2024 Andy Cato, Wildfarmed Damien McLoughlan, Michael Smurfit Graduate School of Business. David Hagen, Diageo, Guiness Martin Hofler, Bord Bia
Individual Travel 27 March-31 March 2024	China	Xie Qingkui, Seamild

Acknowledgments

I have been very fortunate in my life to have had some great mentors.

Firstly, my dad, Darrell Wiese, who not only taught me how to farm, but also how to innovate and pivot. He built a strong business based on ethics and respect for people. He always gave back. And I distinctly remember him pulling me aside after a meeting, where farmers were complaining about some injustice, and explaining that there is always something you can do to fix a problem!

Thankyou to my wife Jo. Without her I would be a very different person. Not only accepting me and my single-focus brain, at the expense of everything else, but always being strong and true to herself, and gently nurturing me towards a wider understanding. I loved sharing part of this Nuffield experience with her and so appreciate the days of reflection and analysis. Most of my light bulb moments came from Jo's questioning. Jo kept the farm running while I was away which I will always appreciate.

Thankyou to my family, Ruby, Grace and Louis, for their understanding, patience and support. I really appreciated the conversations and interest that we shared.

I had a great mentor in the late 2000's. Marion Fulker AM, who at the time, was the CEO for the Committee of Perth. She came into our business and our lives and raised some brutal truths that opened my mind to change. Her outside perspective has had a significant influence on our lives from that time on.

The grains industry in Western Australia has been a significant part of my life. I was fortunate to put my hand up for a position on the Western Oat Alliance in my mid-20's. This grew to roles in the GPWA Producer's Council, GIWA Oat Council and Board, CBH Growers' Advisory Council, GA's Oat Council, along with many side strategy groups. Our industry is full of good people who I genuinely regard as mentors and friends. Thanks especially to Bob, Tress, Mark and Peter, but there are so many great people who have mentored me.

I want to thank my sponsor, the CBH group, for investing in me and for giving me the opportunity to bring some learnings back to our industry. We are so fortunate in Western Australia to have such a strong cooperative that is focused on creating value. With growers having ownership of the supply chain post farm gate, we have a great opportunity to create value by strengthening the connection from the farmer to the consumer.

Figure 7. CBH staff dressed in kangaroo costumes featured in a marketing campaign by Seamild. (Source: YouTube youtu.be/FxmYHF6s9sY?si=hYXrm-estxUSfP_g).

I do understand that I can be single-minded and a big thankyou to all those people who have tolerated conversations around oats, value, farming, quinoa, and my car!

Nearly 100 businesses opened their doors and books to us during our travels. We had some amazingly frank and enlightening discussions. Although I have focused on a handful of case studies used to tell this story, I have walked away from every encounter with something of value that has contributed to this report and my life. I would like to mention Chris Green who I met up with in England. As a fellow "oat appreciator" I really valued his insight into how oats could help address the huge cost of obesity and be used as a way of quickly getting nutrition in the form of aid to countries in need of help. He also gave me the quote: "God put a hull on oats to give wheat a chance".

Figure 8: GFP 6, 2024. Kenya. (Source: Author).

Nuffield is just a family of people who will go out of their way to lift someone up. I have been staggered by the generosity of people who despite their busy lives have given up time to talk, make connections, listen, and simply be there when I have needed help. A big thank you to Josh, Stu, and Bart, but also to all those who helped us on our travels.

The Nuffielders from 2024 are a pretty special group and I am so thankful that these young people so openly let me in. I must mention Sally and Tom, who are just simply impressive, wonderful humans.

I wanted to thank Linda Weber Eatherton, who despite being a consultant was always so generous with her time. She genuinely wants people to understand this value creation stuff!

Thanks to my great team on the farm. It was amazing how seamless things ran without me there. I probably should reflect on that some more!

Thankyou to Jo Fulwood who, with her grains and journalism background, has been a great editor, and motivator. I really appreciated her generosity and enjoyed her guidance.

Thankyou to Vincent Britnell whose feedback guided me towards greater clarity around my recommendations.

I will be forever grateful to Bob who convinced me to apply for a scholarship despite being too old.

Figure 9: GFP 6, 2024. Nebraska. (Source: Author).

Abbreviations

\AAA	American Angus Association
AEGIC	Australian Export Grains Innovation Centre
AWB	Australian Wheat Board
B2B	Business to Business
B2C	Business to Consumer
CAB	Certified Angus Beef
CBH	Co-operative Bulk Handling Group
GA	Grains Australia
GIWA	Grain Industry Association of Western Australia
GPWA	Grain Pool of Western Australia
GRDC	Grains Research and Development Corporation
MLA	Meat and Livestock Australia
RD&E	Research, Development and Extension
USDA	United States Department of Agriculture

Objectives

My objectives for my Nuffield journey were:

1. **To explore global case studies of value creation.**
   Ideally these were to be outside of the grains industry.

2. **To strip these case studies back to core learnings.**
   I wanted to simplify the core areas of success so that my learnings could easily be applied to any industry.

3. **To create recommendations to help other commodities create value.**
   My particular focus was on being able to apply these learnings back to the Australian grains industry, while being broad enough to be of value across any commodity.

Introduction

In 1975 Harold Etling, a US cattle rancher wrote a letter to Fred Johnson, Director of the American Angus Association (AAA), complaining about the poor eating experience he had just had in an Angus Steakhouse. After talking to the supplier of the steakhouse, Harold said it reminded him of the man who was marketing Rabbit Sausages. When someone accused him of using meat other than rabbit, he said he used half rabbit and half horse. When questioned further, he said he used one rabbit and one horse.

In summary, there was a problem with consumer trust in American Angus Beef.

The solution was to build a supply chain that provided consistent, superior quality beef to consumers. So, in 1978, Certified Angus Beef (CAB) was born.

Figure 10. Example of CAB consumer-facing storytelling. (Source: certifiedangusbeef.com).

Today it is one of the most successful case studies of value creation in existence.

My drive to do a Nuffield Scholarship was to learn how to apply value creation to a commodity market like grain.

In 1939, the Australian Wheat Board (AWB) was established as a statutory marketing authority to stabilise wheat prices and coordinate exports during World War 2.

In 1989, it became a grower-owned statutory corporation where it retained its export monopoly and became more commercially focused.

From 1999 to 2008, it became a corporatised entity listed on the Australian Stock Exchange (ASX). It retained its single desk export monopoly until 2008 when its single desk status was removed. It now forms part of the Nutrien group.

Various reviews have been conducted over the AWB and whether this structure created value.

The Productivity Commission Review (2000) concluded that there was some evidence of price premiums in specific markets (Japan, Middle East), although results varied year to year, and the net benefits after cost were harder to establish. Other reviews concluded that premiums were more likely in quality-differentiated markets.

Following deregulation, we have faced a decade where “industry good functions” have lacked some ownership, funding and consistency.

Out of necessity, the industry has headed down a least-cost, commodity pathway, and grain has been traded as a commodity, directly competing against similar commodities globally.

While this suits some grains, there is now few ways to differentiate Australian grain from other grain, or competing foods, and as a result it is now difficult to create value.

However, some grains do deserve some individual attention regarding the potential for value adding.

In 2012, GRDC and the Government of Western Australia formed AEGIC to focus on technical support, end-use quality, and customer engagement in key export markets.

While AEGIC can educate customers on the benefits of Australian Grain, it does not have the scope to market this story under an Australian grain brand.

In 2022 GA was formed with the role of overseeing the industry-good functions of classification, trade and market access, market insight, and market education. In 2026 AEGIC was integrated into GA to form one industry good organisation.

This report does not propose to bring back statutory marketing. However, it does highlight that since losing the AWB and other bodies like the GPWA, we have lost a coordinated approach to the industry-wide marketing of Australian grain.

This report will look at case studies of businesses (mainly outside of the grains industry) that have attempted to create value over the baseline commodity price. I will summarise learnings down to a few key points that can be used to develop models of value creation for other commodities.

I was motivated to explore if learnings from global case studies could be applied to grain.

Certified Angus Beef: A Case Study in Value Creation Beyond Commodity

CAB was established in 1978 by the AAA as a response to a clear supply chain problem in the American beef industry. Beef was being sold as an undifferentiated commodity despite large variation in eating quality. Consumers could not reliably predict tenderness, flavour or consistency at the point of purchase. Producers who raised higher-quality cattle were rarely rewarded. The result was a supply chain optimised for throughput, not for eating satisfaction. As a result, CAB was created to solve that unmet need.

Solving an Unmet Consumer Need: Consistency and Confidence

At its core, CAB identified a simple but powerful gap in the market, this being that consumers wanted consistent enjoyable beef but lacked a product they could trust. Rather than marketing Angus cattle genetics, CAB marketed a promise about food. The brand was built around eating experience, tenderness, marbling, juiciness and flavour, rather than breed purity alone.

CAB established 10 science-based carcass specifications that exceed USDA Choice standards, whereby only a minority of cattle qualify. This strict gatekeeping created scarcity and credibility. The brand did not attempt to elevate all Angus cattle; it elevated only those that delivered superior eating performance.

This differentiation was critical. CAB did not attempt to “sell beef.” Rather, it positioned itself around a food experience and backed that promise with measurable standards.

The unmet need was not breed recognition; it was eating satisfaction.

By focusing on flavour and consistency, CAB shifted beef from a commodity defined by grade to a differentiated food defined by experience.

Talking About Food, not Agriculture

A central theme in CAB leadership presentations is the brand talks about food, not cattle. Consumers do not buy carcass traits; they buy meals, celebrations and shared moments. CAB invests heavily in chef partnerships, retail training, menu storytelling and culinary education. It’s messaging centres on steaks on the plate, recipe inspiration, and the joy of a great meal.

This reframing is important. Rather than explaining marbling scores in technical language, CAB translates quality attributes into food outcomes. The conversation is about how it tastes, how it cooks, and how it performs in a restaurant or home kitchen.

By focusing outward on the consumer instead of inward on the supply chain, CAB created consumer-demand pull. Retailers and foodservice operators could justify a premium because consumers recognised and trusted the brand. The product became a choice, not just a specification.

Creating Stories That Travel Through the Supply Chain

CAB has also succeeded by telling a coherent story linking producers to plates. The narrative connects family ranchers, responsible cattle care, and rigorous quality standards with the final eating experience. The story reinforces authenticity and trust while remaining anchored in food quality.

We spent a day with New York State rancher Phil Trowbridge who gave us a great understanding of the value CAB created for his industry.

Figure 11. Ashley Wiese, Phil Trowbridge and Jo Wiese at "Trowbridge Angus" New York State, USA. (Source: Author).

Importantly, the story is consistent across all touchpoints. From packer licensing to restaurant menus, CAB maintains strict brand control. This creates cumulative brand equity rather than fragmented messaging.

CAB runs a program called "Brand the Barn" where passionate ranchers write in and tell their stories. This program identifies the best ranchers every year, assists them to set up websites for their farms that connect back into CAB, paints their barns with the CAB brand, and produces high quality imagery and stories that connect through to consumers.

CAB's story telling is consumer-facing, not industry-facing.

A coffee-table book is produced containing these stories, and a "Brand the Barn" road trip is promoted around the USA.

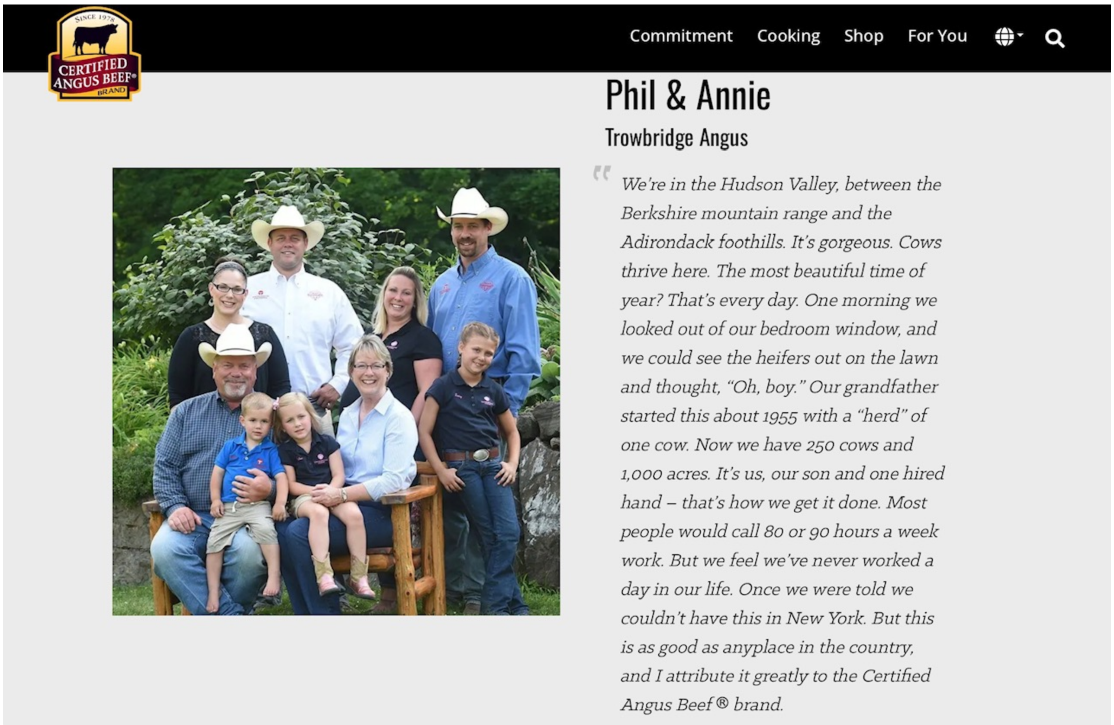


Figure 12. Example of CAB storytelling. (Source: CAB Brand the Barn Publication).

The storytelling is not abstract, but purposely specific. Fewer cattle qualify, standards are measurable, chefs prefer it for consistency, and consumers return because it performs. This credibility allows CAB to command attention in crowded retail environments.

In this way, CAB transformed Angus beef from a commodity into a food brand with emotion and experiential resonance.

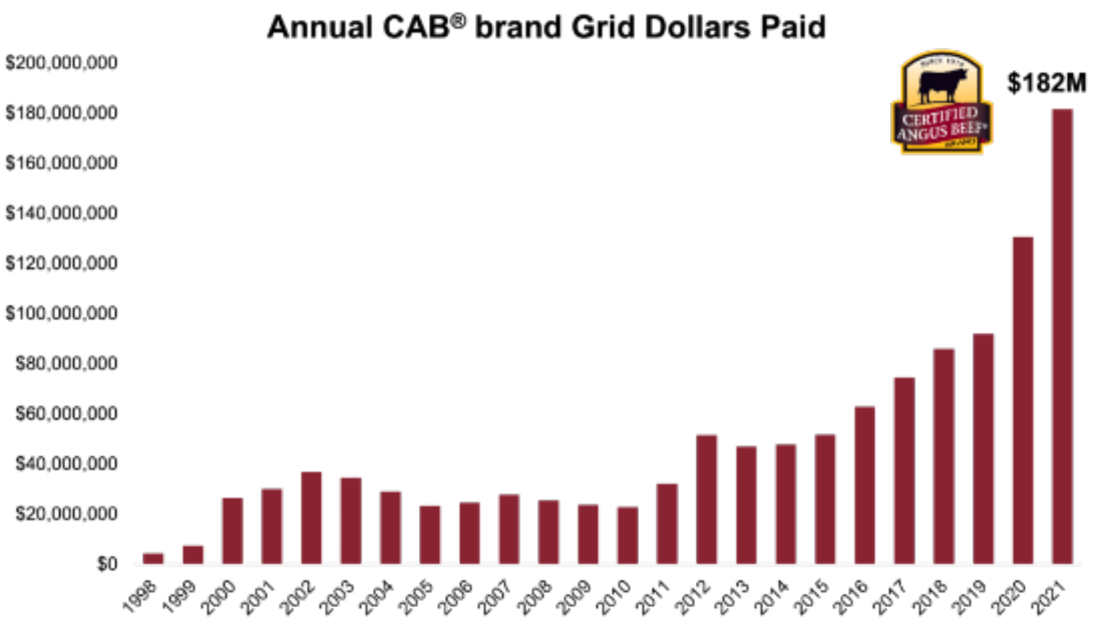


Figure 13. Illustration of total premiums paid from the CAB certification to producers between 1998 to 2021. (Source: [cabcattle.com/certified-angus-beef-premiums-record-high-in-2021/)](cabcattle.com/certified-angus-beef-premiums-record-high-in-2021/)

Structural Design: Why it Works.

CAB's success is inseparable from its structure.

CAB LLC is a not-for-profit subsidiary of the AAA. It does not own cattle, operate feedlots, or process beef. Instead, it licenses packers and distributors and collects a per kilogram commission from the trade on certified product sold. This creates a self-reinforcing funding model: the more value created, the more resources available to reinvest in marketing, education and brand development.

This structure provides several advantages.

First, it aligns incentives between all in the supply chain. Producers benefit from premiums when cattle qualify. Packers benefit from a differentiated product that commands a higher cutout value. Retailers and restaurants benefit from a brand that increases consumer confidence and repeat purchase.

Second, the model separates brand governance from commodity trading. CAB is not a trader competing with exporters; it is a standards and marketing organisation. That clarity avoids conflict within the supply chain.

Third, the funding mechanism ensures durability. Because revenue comes from commissions on branded product rather than government appropriations, CAB can invest consistently in long-term brand building. It is insulated from political cycles.

Finally, its governance through the breed association ensures producer ownership while maintaining professional marketing management. This blend of grower control and commercial discipline has been critical to its longevity.

Creating Measurable Economic Value

The ultimate measure of CAB's success is economic. CAB premiums are regularly reported in U.S. grid pricing systems as additional dollars per hundredweight (100 pounds) above standard commodity beef. These premiums fluctuate with supply and demand, but they represent consistent recognition of brand-driven value.

More importantly, CAB has influenced the entire Angus genetic base. Selection for marbling and carcass performance has accelerated because there is a clear financial incentive. In this way, the brand reshaped production decisions upstream.

Today, CAB sells hundreds of millions of kilograms annually and operates globally. Its scale demonstrates that value creation in agriculture does not require abandoning commodity production; it requires differentiating a segment with credible standards and sustained storytelling.

Figure 14. Example of CAB consumer-facing storytelling. (Source: certifiedangusbeef.com).

Lessons in Value Creation

CAB's success has not been because of simply marketing beef as a commodity. It succeeded because it marketed a food experience that solved a consumer problem. It did not rely on government subsidies; it built a self-funding commission model funded by the trade rather than ranchers. It did not try to elevate all product; it enforced strict qualification standards. It did not talk about cattle; it talked about meals.

The structural separation between research, production and brand governance allowed it to remain focused. The clarity of purpose, consistent eating quality, ensured that every marketing dollar reinforced a single promise.

CAB demonstrates that durable value in agriculture is created when:
• An unmet consumer need is clearly defined.
• Standards are measurable and enforced.
• The brand story focuses on food, not production.
• The governance structure aligns incentives across the chain.
• Funding is linked directly to premium product flow.

CAB creates additional value without discounting the beef that does not qualify for certification.

One question that challenged us from our visit to CAB was: "**Is certification important?**"

On reflection we have concluded that, yes, it was important for CAB.

However, the main learning is that as an industry we simply must do what is necessary to gain trust.

CAB is a well-resourced marketing body that has been around 50 years in the making. It is something to aspire to and it starts with small steps.

Figure 15. CAB Consumer driven demand strategy. (Source: certifiedangusbeef.com).

CAB has the advantage of having most of its customers and consumers within the USA. This means that any investment in its connection to the consumer also gives it a powerful social license. CAB has over 1.5 million social media connections a day. CAB’s story-telling model is clearly Business-to-Consumer (B2C).

This becomes more challenging when an industry, like the Australian grains industry, predominantly exports its food. This is where a Business-to-Business (B2B) model may be more suited.

Figure 16. Ashley and Jo Wiese meeting CAB Young Cattle Producers at CAB Headquarters Wooster, Ohio USA. (Source: CAB). Insert: Ashley Wiese meeting CAB President Mr John Sticka. (Source Jo Wiese).

Bord Bia: A Case Study in Creating Export Value Through Food-Led Storytelling and Structured B2B Strategy

Bord Bia, the Irish Food Board, provides one of the clearest modern examples of how a national industry body can shift an agricultural sector from commodity exposure toward premium, value-driven export growth. Established under the Irish government and operating in partnership with the Department of Agriculture, Food and Marine, Bord Bia's mandate is not to trade product directly, but to build market opportunity, strengthen reputation, and increase the export value of Irish food and drink globally.

What distinguishes Bord Bia from traditional commodity promotion bodies is its deliberate repositioning of agriculture as food first, rather than as raw production. Instead of marketing "Irish beef tonnage" or "Irish dairy solids," Bord Bia consistently communicates narratives around grass-fed systems, natural production, family farming heritage, animal welfare standards, and sustainability credentials. By framing Irish output as premium food rather than agricultural input, it moves the conversation away from price-per-tonne comparisons and toward value-per-meal messages, trust, and consumer reassurance.

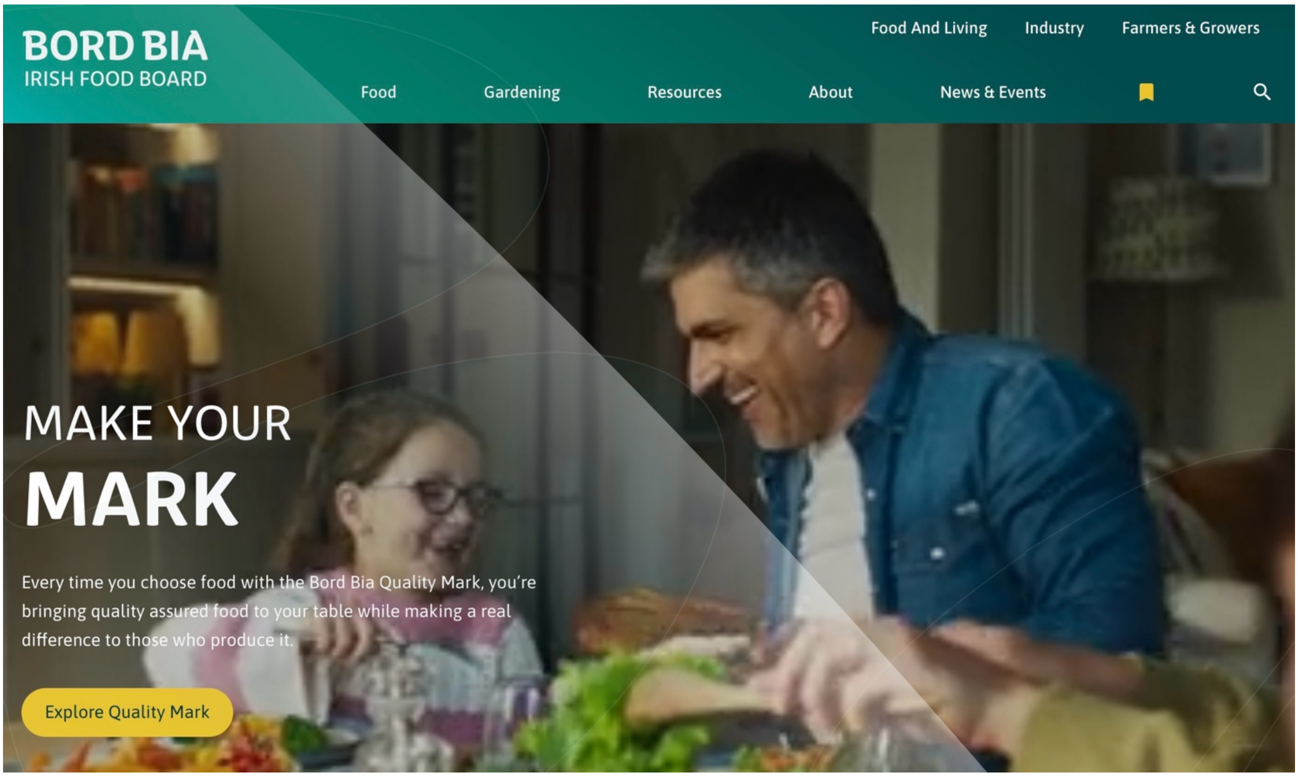


Figure 17. Example of consumer-facing storytelling at Bord Bia. (Source: www.bordbia.ie).

Creating Value by Talking About Food

A core element of Bord Bia's strategy has been reframing commodities into emotionally resonant food propositions. For example, Irish dairy is not positioned simply as milk powder exports, it is positioned as sustainably produced, pasture-based dairy, trusted by global brands and consumers. Irish beef is presented as grass-fed, traceable, and quality assured. This subtle but powerful shift from production metrics to food experience enables exporters to enter premium retail, foodservice, and branded ingredient channels.

By centring its communication on food, Bord Bia elevates the entire supply chain. Buyers are not simply purchasing a commodity input; they are buying into a story of provenance, sustainability, and reliability. This food-centric positioning reduces pure price competition and increases perceived differentiation.

Satisfying Unmet Needs in Global Markets

Bord Bia's success is also grounded in structured market insight. Through international offices and continuous consumer research, it identifies unmet needs in target markets, whether that is demand for sustainably verified dairy ingredients, grass-fed protein, clean-label products, or traceable supply chains.

Its national sustainability programme, Origin Green, plays a central role in this value creation. Origin Green provides independently verified sustainability commitments across farms and processors, enabling Irish exporters to respond directly to retailer and consumer demands for environmental transparency. In many markets, particularly in Europe and North America, sustainability verification has shifted from a marketing advantage to a procurement requirement. By coordinating this nationally, Bord Bia reduces duplication of effort and gives buyers confidence at scale.

This alignment between unmet global demand (e.g. verified sustainability, traceability, trusted provenance) and coordinated national supply capability allows Irish exporters to command higher unit values than they would under undifferentiated commodity exposure.

The Power of Structured Storytelling

Another defining feature of Bord Bia's model is its structured storytelling architecture. Campaigns and trade communications are not fragmented by company or product category; they are nested within a coherent national narrative. This creates cumulative brand equity for Ireland as a food-producing nation.

The storytelling is data-backed rather than generic. Market research informs messaging, ensuring that stories resonate with specific buyer concerns in specific regions. For example, in markets sensitive to carbon footprint and animal welfare, sustainability credentials are foregrounded. In emerging markets seeking food safety assurance, traceability systems are emphasised. The result is not simply promotion, but targeted narrative alignment with buyer psychology.

Over time, this coordinated storytelling builds trust, and trust reduces transactional friction. Reduced friction often translates into longer-term supply contracts, preferred supplier status, and premium positioning, all of which contribute to higher export unit values.

How the B2B Structure Enables Value Capture

Crucially, Bord Bia operates as a Business-to-Business (B2B) facilitator rather than a trader. It packages up data and storytelling around produce that goes into export markets. Its structure enables success in several ways.

First, it reduces search costs for international buyers. Global retailers and processors can engage with a single national body that curates and introduces credible suppliers. This centralised gateway improves access and reduces perceived risk.

Second, it aggregates industry intelligence. By collecting and distributing consumer insights, market data, and regulatory updates, Bord Bia ensures that Irish exporters are strategically aligned with market demand rather than reacting after price signals shift.

Third, it coordinates trade missions, in-market representation, and buyer introductions. This systematic approach contrasts with fragmented exporter-led outreach and allows Ireland to present as a cohesive supply nation.

Finally, because Bord Bia is publicly supported but industry-aligned, it operates with a long-term horizon rather than a short-term profit motive. This allows sustained investment in brand building and market positioning. These are investments that individual exporters may struggle to justify independently.

Value Creation Compared to Commodity Exposure

In Bord Bia's model, export value growth is driven by premium capture, supported by sustainability credentials, provenance storytelling, and buyer trust.

Ireland's agri-food export performance over the past two decades demonstrates this effect. Growth has not been solely volume-led; it has increasingly reflected improvements in export unit value across dairy, beef, and prepared foods. While Irish producers are not immune to global price cycles, coordinated national positioning has helped insulate margins and lift average returns relative to undifferentiated supply.

By talking about food rather than tonnage, identifying unmet market needs, embedding sustainability verification, and executing a disciplined B2B facilitation model, it has created conditions for Irish exporters to compete on value rather than price alone.

Bord Bia has 30 years of data around the safety of Irish food. Then in 2012, it began collecting data and stories around sustainability and social aspects, both from the industry as a whole, as well at the individual farmer level. That data is presented back to the farmer, so they can track their performance, and industry data is collated to be used to support exports.

These farmers now trust this data and the farmers I spoke to recognise that they were receiving value from the work that Bord Bia does, above the inconvenience of having to provide individual data. But this understanding of value has been established over time. This data is detailed, for example Bord Bia could provide data around the hours of volunteer labour that individual farming businesses provided to their communities.

The fact that they had data collected over a 30-year timeframe allowed the industry to tell stories of improvement over time.

Dairy Export Value Comparison (2005–2025)

The graph below presents a comparison of dairy export value expressed in Australian dollars per litre (milk equivalent). The Commodity Model reflects bulk exposure to global Skim Milk Powder/Whole Milk Powder pricing cycles. The Bord Bia Value Model reflects coordinated national branding, sustainability positioning, and premium export capture.

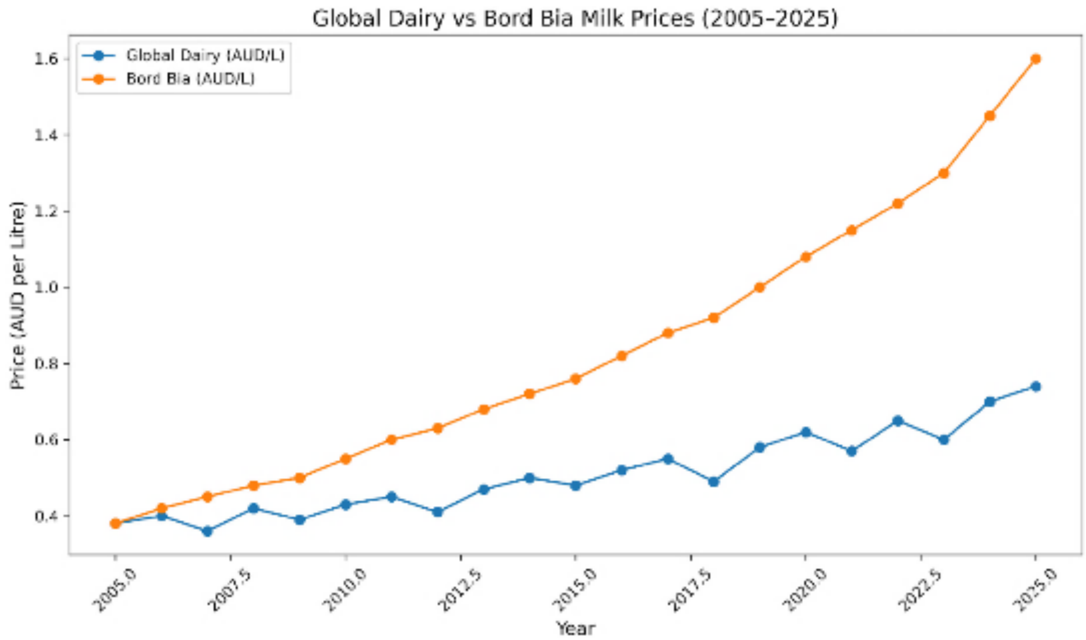


Figure 18. Graph of Value creation by Bord Bia for Irish Dairy compared to Global Dairy. Values are expressed as milk-equivalent export value in AUD per litre. The Commodity Model reflects exposure to global dairy commodity pricing. The Bord Bia Model reflects higher unit export value associated with coordinated branding, sustainability assurance (e.g., Origin Green), and premium positioning. (Source: Food and Agriculture Organization of the United Nations. (various years). FAO dairy price index. fao.org/worldfoodsituation/foodpricesindex, Department of Agriculture, Food and the Marine (Ireland). (various years). Irish dairy statistics and milk price data. Government of Ireland. gov.ie/en/organisation/department-of-agriculture-food-and-the-marine/ Reserve Bank of Australia. (various years). Historical exchange rate data (AUD/EUR). rba.gov.au/statistics/frequency/exchange-rates.html)

Bord Bia recognised that it was too expensive to provide a model that was business to consumer (B2C), so it focuses on packaging up data and stories that businesses can use in telling their stories to their consumers.

Figure 19. Ashley Wiese and Martin Hofler, Senior Sustainability Manager Origin Green Program, Bord Bia. (Source: Author)

Wildfarmed: Regenerative Agriculture Built Through Food, Storytelling, and Trust

Wildfarmed is a regenerative food and farming business founded in 2018 by Andy Cato, George Lamb, and Edd Lees, with a mission to transform how food is grown and how people connect to it. Wildfarmed is built around the idea that agriculture should work with nature rather than against it, and that consumers can play an active role in changing the system through the simple act of choosing what they eat.

At its core, Wildfarmed addresses a major unmet need, this being the concept that modern agriculture is often perceived to be associated with soil degradation, loss of biodiversity, reduced nutritional quality of food, and climate pressures. Wildfarmed challenges this model by offering a practical, scalable alternative that claims enhances soil health, increases biodiversity, reduces pollution, and produces food that tastes better and is more nutritious for both people and the planet.

Figure 20. Example of Consumer-facing storytelling by Wildfarmed. (Source: Wildfarmed Newspaper at their stand at Groundswell Regenerative Agriculture Festival, England 2024).

Central to Wildfarmed's credibility is Andy Cato's personal journey. Cato is a multi-award-winning farmer and a Grammy-nominated musician best known as one half of the electronic music duo Groove Armada. Frustrated by his belief that industrial farming (large scale farms producing cheap food by focusing on output and efficiency) has a negative impact on nature, he sold his music publishing rights to buy a farm in France, embarking on over a decade of regenerative experimentation.

This unique backstory gives Wildfarmed a relatable hero narrative that breaks the stereotypes of agriculture. People outside farming feel they can understand and trust a message delivered by someone with a well-known background, which has helped broaden the appeal of regenerative agriculture beyond niche circles.

Cato's credibility outside agriculture lends authenticity to his advocacy. When he speaks about soil health, food systems, and climate, it isn't seen as niche expert rhetoric but as lived experience. This narrative helps consumers and retailers alike feel confident in Wildfarmed's mission and claims. What he achieves is the belief that when he makes management decisions on his farm he is thinking about the impact it would have on the people eating that food. "There is a bit of love going into the food that we produce."

Wildfarmed's value proposition hinges on food that is more than just a commodity. They grow wheat, barley, and oats using regenerative methods that prioritise living soil, biodiversity, and minimal chemical inputs. These principles are rooted in nature-based practices, keeping soil covered year-round, promoting plant diversity, maintaining living roots, and minimising disturbance. All of which they claim contribute directly to healthier fields and, by extension, food with character and nutritional integrity.

This approach resonates because it speaks to tangible outcomes that consumers can relate to, flavour, nutrition, and environmental benefit. The Wildfarmed story explicitly connects soil health with food quality, a simple message that allows consumers see their choices as part of a broader ecological impact.

Meeting an Unmet Market Need

Conventional supply chains have traditionally overlooked regenerative practices, leaving farmers with little incentive to farm regeneratively because their grain simply enters the same commodity pool as standard crops. Wildfarmed addresses this unmet need by creating a segregated route to market that includes guaranteed premiums and clear standards for regenerative cultivation.

Figure 21. Ashley Wiese and Andy Cato, Co-founder of Wildfarmed. (Source: Author).

Storytelling That Builds Trust with Consumers and Retailers

A key reason Wildfarmed succeeds in grabbing attention is its storytelling. Rather than leading with technical jargon about carbon sequestration or soil biology, Wildfarmed frames its story around positive transformations: landscapes buzzing with wildlife, fields rich in biodiversity, and bread that tastes different because of the way it was grown. This helps consumers feel engaged rather than overwhelmed by complexity.

Its branding invites consumers to participate in a movement, not just buy a loaf of bread.

When I was talking to Steve McLean (Head of Agriculture & Fisheries) at Marks and Spencer in the UK, Steve told me the company was trying to demonstrate to customers that it was sourcing products from regenerative farmers, while at the same time, struggling to explain what “regenerative” meant.

By packaging the story of regenerative agriculture through everyday food experiences, Wildfarmed has enabled supermarkets and retailers to tell a more compelling story to their customers. Retailers like Marks & Spencer, Tesco, Waitrose, and major foodservice partners now stock Wildfarmed bread and flour, using it as a narrative device to demonstrate their commitment to sustainability and quality.

This works for supermarkets because it bridges the gap between abstract sustainability goals and concrete consumer choices. Customers aren’t just buying food, they’re supporting landscape restoration, ecosystem health, and community resilience.

Wildfarmed is very successful in packaging up the storytelling to assist its customers (the supermarkets) tell a sustainability story to their consumers. This has been powerful because of the trust that Andy Cato has brought from outside agriculture when telling this story.

However, it's worth noting that Wildfarmed has made the mistake of achieving this success by painting conventional agriculture as “destructive”. This is something that CAB was very clear on avoiding.

I believe we can tell our stories to create value, without needing to do it at someone else’s expense.

Diageo and Guinness: Regenerative Sourcing, Data Transparency and Value Creation

Diageo is one of the world's largest premium drinks companies, operating in more than 180 countries with a portfolio that includes Johnnie Walker, Smirnoff, Baileys and Guinness. At the heart of its brand portfolio sits Guinness, brewed at St James's Gate in Dublin and produced in nearly 50 countries worldwide.

Through its corporate sustainability framework, "Society 2030: Spirit of Progress," Diageo has positioned sustainability as a strategic lever for long-term value creation and risk mitigation.

Diageo's sustainability strategy is structured around three pillars, these being:

- Promoting positive drinking,
- Championing inclusion and diversity, and
- Pioneering grain-to-glass sustainability.

The third pillar is particularly relevant for Guinness, because its core inputs (barley, water, yeast and hops) are agriculturally dependent and climate exposed.

Under this strategy, Diageo has committed to sourcing 100% of its key agricultural raw materials sustainably and implementing regenerative agriculture practices across its supply chains. These commitments are supported by measurable targets, transparent reporting, and third-party standards. By embedding sustainability at the corporate level rather than leaving it brand-by-brand, Diageo creates scale efficiencies and consistency of approach, while Guinness benefits from the halo of a credible, global ESG framework.

Figure 22. Ashley Wiese and David Hagen, Global Regenerative Manager, Diageo, Dublin, Ireland. (Source: Author).

Data Collection and Input Transparency as Risk Management

A central feature of Diageo's approach is data. The company collects detailed information on agricultural inputs, water use, carbon emissions, soil health, and supplier performance.

For Guinness, barley sourcing is particularly critical. Barley quality directly affects flavour, yield, and brand consistency. By working closely with farmers, especially in Ireland and the UK, Diageo gathers data on cropping systems, fertiliser use, soil health, and emissions intensity. This reduces operational risk in several ways. Interestingly Guinness doesn't buy barley, it buys malt, yet it focuses its data collection and storytelling at the farm level of their supply chain.

Figure 23. Example of Consumer-facing Storytelling by Guiness. (Source: [guinness.com).](guinness.com)

By mapping and monitoring supplier practices, Diageo can identify vulnerabilities early and support adaptation measures such as soil health improvement, diversified rotations, and water stewardship.

Consumers increasingly expect transparency around sourcing and environmental impact. By tracking and reporting progress against measurable targets, Diageo protects Guinness from accusations of greenwashing (when a company misleadingly presents its products or practices as environmentally friendly to improve its image) and strengthens stakeholder trust.

As carbon disclosure, ESG reporting, and supply chain due diligence laws expand globally, Diageo's data systems position it ahead of compliance requirements. What might otherwise become a cost burden becomes a competitive advantage.

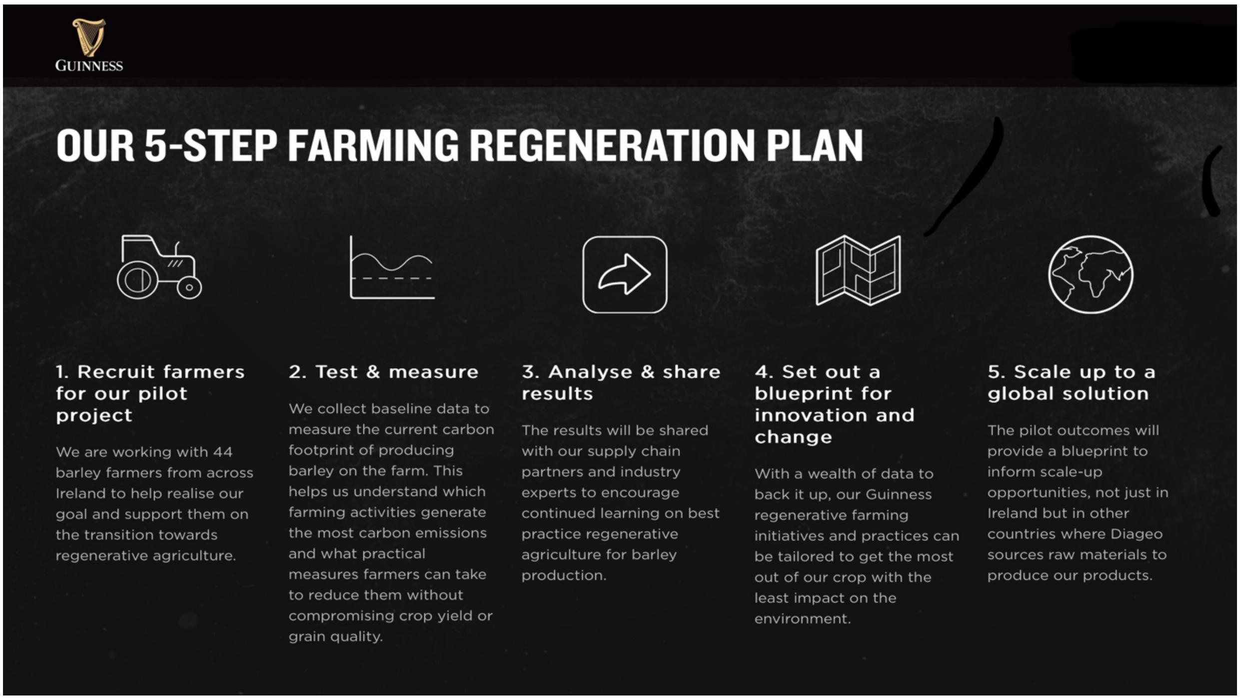


Figure 24. Example of Consumer-facing Storytelling by Guiness. (Source: guinness.com).

Regenerative Agriculture: Creating Environmental and Brand Value

Diageo has publicly committed to implementing regenerative agriculture practices across its key supply chains by 2030. For Guinness, barley is the primary agricultural input. Regenerative practices include improving soil organic matter, reducing synthetic fertiliser dependence, enhancing biodiversity, and improving water management.

Guinness has always traded on heritage, craftsmanship and Irish provenance. By linking that heritage to modern regenerative practices, Diageo deepens the narrative: not only is Guinness rooted in Ireland's past, but it is also investing in Ireland's agricultural future.

Rather than treating barley as an interchangeable input, Diageo positions it as a story-bearing ingredient. This shifts barley from commodity status toward a value-added, identity-defining input. In effect, regenerative sourcing becomes both a supply chain resilience strategy and a marketing asset.

Economic Value Creation

Although focusing on sustainability enhances Guinness' emotional connection with consumers and builds trust, the strong driver for Diageo is about protecting the "Guinness" brand. By having data-backed stories around the sustainability of inputs to its products, they are proactive in building trust and reducing damage from an attack from minority groups.

When I asked what that Guinness wants from a grains industry that supplies malt barley into its supply chain, a spokesperson said three things: "data, data, data".

The Diageo–Guinness case demonstrates how a global beverage company can convert sustainability from a defensive compliance exercise into a proactive value creation strategy. By collecting granular data across its agricultural inputs, committing to regenerative agriculture, improving water and carbon efficiency, and transparently reporting progress, Diageo reduces operational, reputational and regulatory risks.

At the same time, Guinness leverages this strategy to strengthen its brand narrative, linking heritage, craftsmanship and regenerative sourcing into a cohesive story. The result is a model where environmental stewardship underpins both risk mitigation and premium brand value.

With a focus on reducing risk to its brand, we need to be mindful that any storytelling we do as an industry needs to be supported with data. Otherwise, we may end up increasing risk to the customers who use our grain. For example, if we claim that a grain is "sun-ripened" we need to be able to demonstrate that we are testing grain to ensure it has not had chemistry applied to ripen it.

Rockit Global: Satisfying an Unmet Need

Rockit Global is a New Zealand horticultural company that has transformed apples (traditional commodity category) into a premium, branded, convenience-led snack proposition.

Rather than competing in the crowded bulk fruit and vegetable aisle, Rockit has built a differentiated consumer offering around portability, portion control, sweetness, and lifestyle positioning.

The result is a brand that has repositioned apples from a staple household fruit into an impulse snack, creating value across the supply chain and expanding the category into entirely new retail environments.

Figure 25. Rockit Apples. (Source: Rockitapple.com)

At the heart of Rockit's strategy is the identification of a clear unmet need: convenient, healthy snacking that competes directly with packaged snack foods. Traditional apples are often large, require refrigeration or careful storage, bruise easily in bags, and are sold loose or in bulk, making them less suitable for on-the-go consumption. Rockit addressed this gap by breeding and commercialising miniature, sweet apples specifically designed for snacking.

The apples are small enough to be eaten in a few bites, highly consistent in flavour, and packaged in recyclable, clear tubes that protect the fruit and enhance portability. This solves multiple consumer pain points at once: hygiene (protected fruit), convenience (grab-and-go), portion control (snack-sized), and indulgence (sweet taste). In doing so, Rockit reframed apples from "fruit bowl filler" to "healthy treat."

Importantly, this strategy does not merely compete for a share within the apple category; it expands the market. Rockit competes with muesli bars, confectionery, and chips in the impulse snack space. It positions itself alongside a packet of Pringles in a service station. And in doing so retails at a price that is multiples of what could be achieved in the fruit and vegetable section of a supermarket.

Rockit has identified an unmet need and found a way to expand its market by displacing another food choice.

Figure 26. Mark O'Donnell, CEO Rockit Global with Ashley Wiese. (Source Author).

Linda Weber Eatherton: Satisfying an Unmet Need

I had the good fortune of being connected to Linda on two previous occasions. The first time was when I was a participant in a Rabobank Global Masterclass.

The second time was when GIWA engaged Linda to run a workshop around Social Licence in agriculture.

Linda spent two decades leading Ketchum's global food and beverage practice providing counsel and oversight to food and agricultural organisations globally.

She currently runs Eatherton Consulting, based in Chicago, and has always been so generous with her time.

Her wisdom is scattered through this report, but I thought she deserved her own case study.

"We need to stop telling our story and listen to what customers want and can't find. We then need to fill this value gap."

(Source: Linda Weber Eatherton, 2024).

Linda told me the story about the Californian strawberry industry that incorrectly believed it was competing against Florida strawberries in the market. After doing in-market research it was discovered that the main competitor to Californian strawberries were apples. So, the industry pivoted its marketing towards educating an apple consumer as to why they should eat strawberries instead of apples.

We have a huge opportunity to look at the unmet needs of a consumer of competing food such as rice and focus on where our whole grains solve problems.

Table 2 below highlights one area where our grains could solve a consumer's problem. Wheat produces 10% of the carbon emissions of rice per hectare, and 25% of the carbon emissions of rice per calorie.

Table 2. Crop Specific Summary of Greenhouse Gas Emission Areal Intensities and Emission Caloric Intensities 2020. (Source: nature.com/articles/s41558-026-02558-4).

Extended Data Table Crop-specific summary of greenhouse gas emission areal intensities and emission caloric intensities

From: Spatially explicit global assessment of cropland greenhouse gas emissions circa 2020

Region	Emissions per hectare (Mg CO_2e per ha)	Emissions per calorie (Mg CO_2e per M-kcal)	N_2O	CH_4	CO_2
Rice	10	0.4	9%	80%	11%
Maize	1.3	0.1	57%	2%	41%
Wheat	1.0	0.1	55%	3%	42%
Oilpalm	6.5	0.3	7%	3%	90%
Soybean	0.7	0.1	39%	4%	57%
Other vegetables	1.6	0.1	68%	1%	31%
Barley	1.2	0.1	43%	3%	54%
Sugarcane	2.1	0.1	66%	2%	32%
Rapeseed	1.5	0.2	40%	3%	57%
Other cereals	2.0	0.2	30%	4%	66%
Rubber	3.3	-	12%	2%	86%
Cotton	1.2	-	75%	1%	24%

By identifying the unmet needs of consumers across all competing foods we can then target those markets with our storytelling.

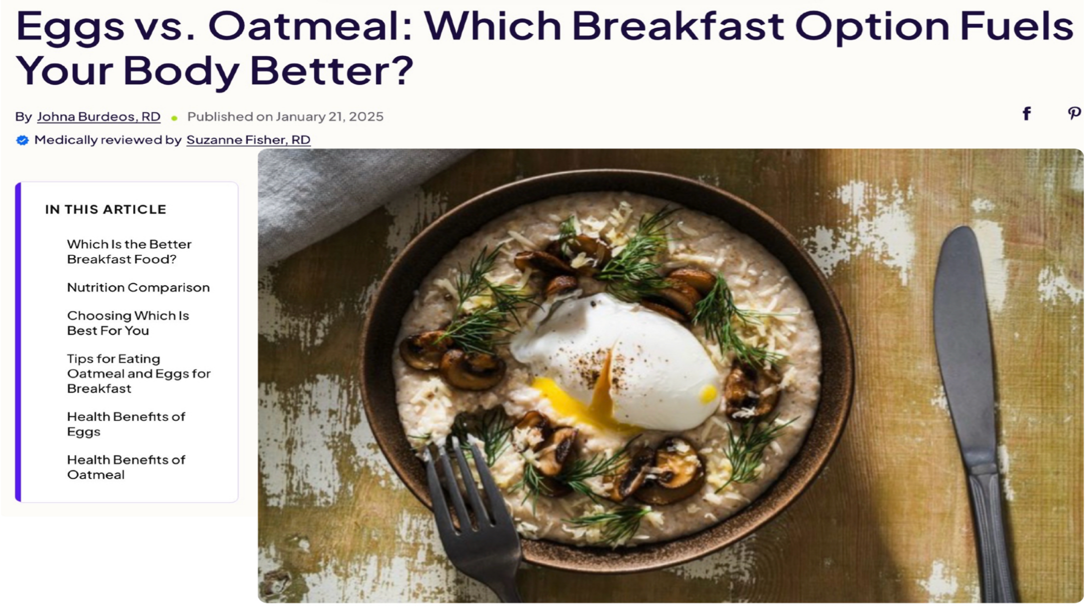


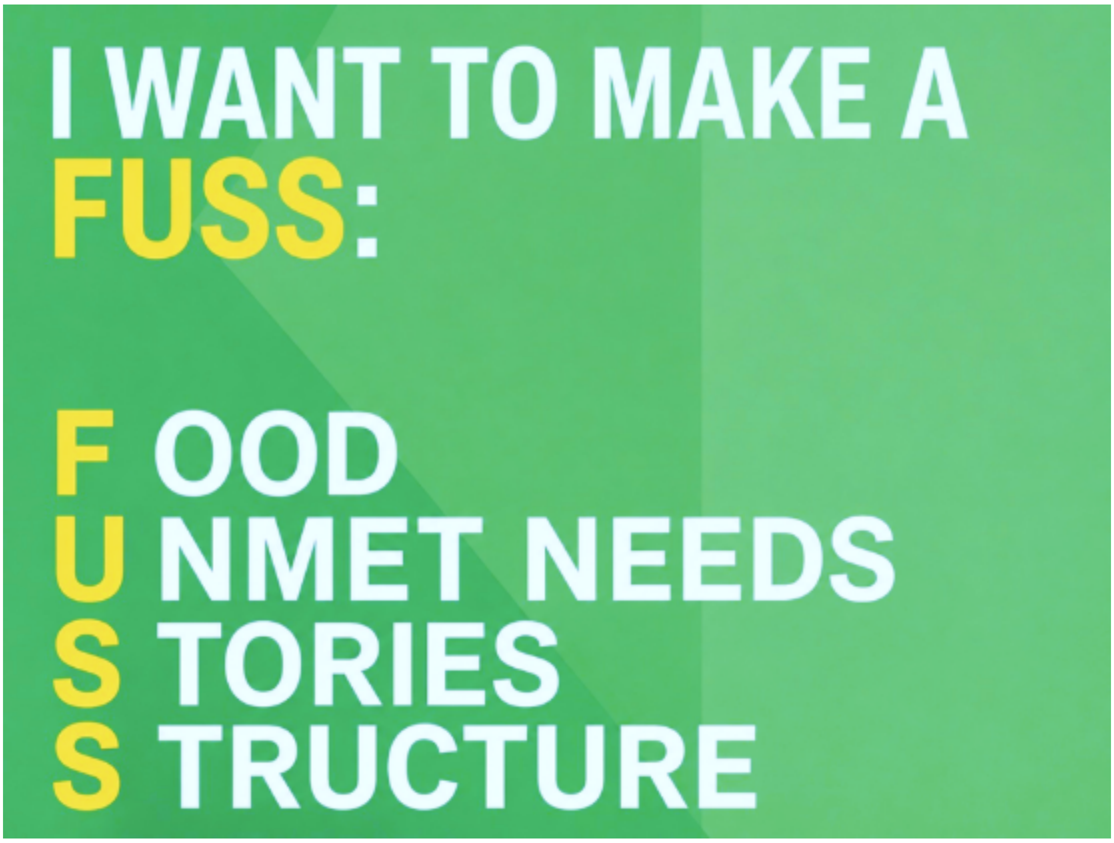
Figure 27. Eggs vs oatmeal: Which breakfast option fuels your body better? (Source: Johna Burdeos 2023).

Linda reinforced the importance of storytelling but said this strategy must be consistent and ongoing. Building trust through stories builds social license and connection.

Linda shared a paper on Branding Agricultural Commodities (http://pubs.iied.org/16509IIED.html) which I have included in Attachments. It highlights that even the most indistinguishable commodities, such as water, can create value through branding when efforts are targeted into markets that are prepared to pay for a branded product.

Understanding a consumer's or customer's unmet need is an important first step. If the unmet need is simply "more affordable food," it is unlikely that value can be created by focusing on this market.

Conclusions



Food

When a consumer sits down to eat a breakfast, they don't choose between Australian oats and Canadian oats. Rather, they are choosing between oats, toast, congee, and eggs.

As an industry, we need to understand if our competitor is a competing source of grain, or a competing food choice.

We need to have a clear understanding of this to identify where opportunities exist to create value.

Value is created by consumer driven demand, and consumers connect to food. So, let's talk about **food** and not agriculture.

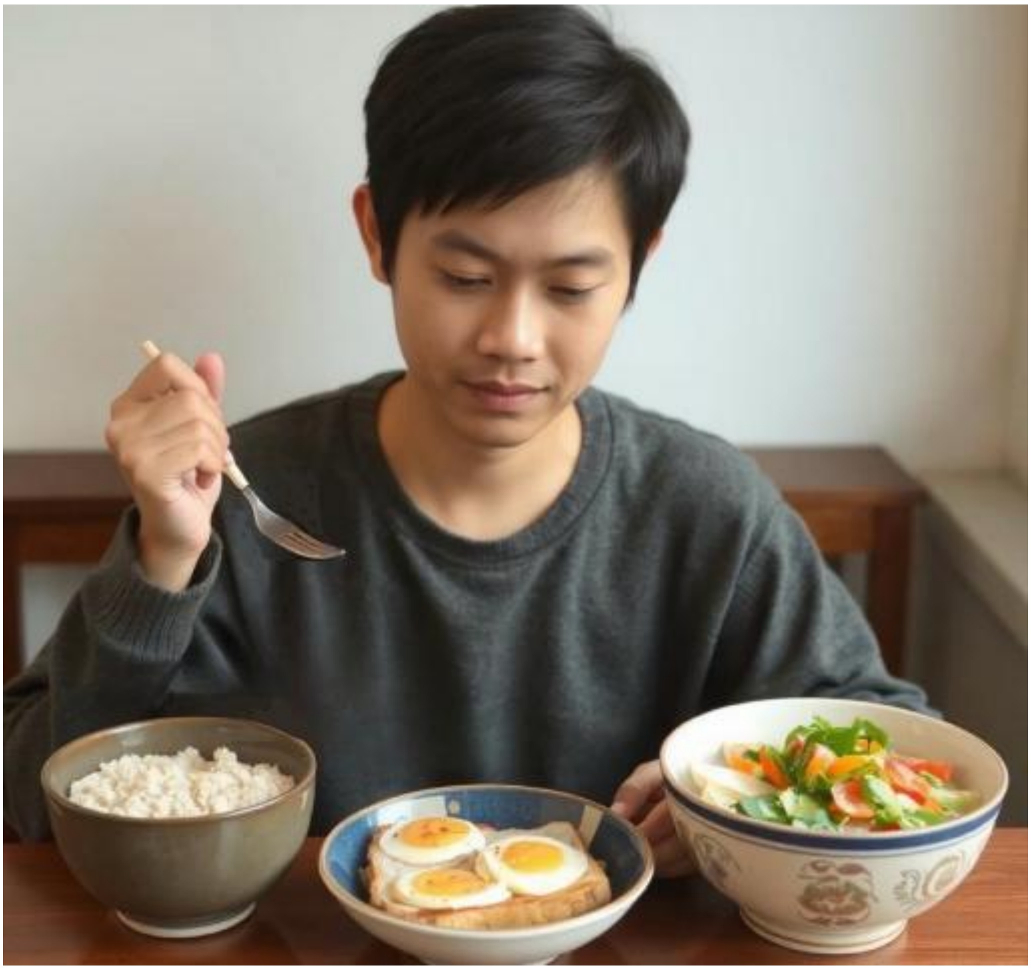


Figure 28. Image of a consumer choosing between different food options for breakfast. (Source: Author / ChatGPT).

Unmet Need

Instead of thinking about how we sell grain, let's think about solving consumer or market problems.

To create value, we need to identify opportunities to solve problems that are not focused on price alone.

These opportunities won't exist for all grains into all markets, so it is important that work is done to identify where the opportunities for value creation do exist.

Storytelling

Let's talk about **food**.

Let's **package up** stories that are consumer-facing, so it is easy for our customers to use to tell our story to their consumers.

Let's present these stories in a way that consumers and AI search engines can **discover** them when consumers are making food choices.

Let's be **proactive** with our storytelling rather than reactive.

Let’s back our stories up with **facts** so we reduce risk for our customers.

Let’s use **consistent** branding across our industry, which is consumer-facing.

Let’s do what is necessary to **build trust**.

Let’s simply focus on **what we do well**, without the need to tell stories at the expense of others.

Let’s maintain **consistent messaging** over prolonged periods of time.

Let’s use **trusted ambassadors** ideally from outside our industry.

Structure

Creation of an industry body that allows for the funding of pre-competitive data collection and storytelling.

Since the collapse of the single desk in Australia, we have lacked a single strong brand for Australian grain. Unlike Meat and Livestock Australia (MLA), GRDC has no explicit marketing power within its legislation. This is a result of MLA historically inheriting both RD&E functions as well as marketing functions, where marketing in the grain industry had historically been handled by commercial exporters and not a levy-funded body.

Industry bodies should fund pre-competitive data collection, market research, and storytelling that can then assist our industry to target markets where our commodities can solve problems created by competing foods.

Recommendations

For the grain industry to successfully create value through consumer driven demand it needs an industry-funded organisation to support market growth and create pre-competitive advantage by telling stories that connect to the consumer in strategic markets where opportunities for value creation have been identified.

1. Gather Evidence for Change

The industry must first establish where coordinated market education can deliver measurable farm-gate returns.

Modelling should be conducted to clearly identify what per-tonne uplift would be required to justify investment and which grain segments have realistic differentiation potential.

The objective is not generic promotion across all grains, but to identify where Australian grain can solve specific food problems and command structural advantage over competing food choices.

2. Establish/Support an industry-funded organisation to create market growth and pre-competitive advantage by telling stories that connect to the consumer.

There are two pathways to achieve this:

A. Work within current industry structures to establish and resource this function.
B. Pursue structural reform to create or reshape institutions so this function is embedded and sustainably funded.

Independent advice should determine whether market education powers can sit within current legislation, whether amendment to the Primary Industries Research and Development Act 1989 would be required, or whether a new statutory body would be necessary.

Pathway A: Creating Value Within the Current Structure

This option proposes fitting within the GRDC Research, Development & Extension Plan 2023-28.

Within the strategic pillar of “Grow Markets and Capture Value” there is the aspiration of “Growers have access to a diversity of markets and get more for the crop”.

(Source: Grains Research and Development Corporation (2023), Research, Development and Extension Plan 2023-2028, p.10. rdeplan.grdc.com.au).

Creating Value at a Commodity Level.

Although GRDC cannot directly undertake marketing or advocacy, it can invest in understanding domestic and global markets and undertake RD&E that supports market growth or creates competitive advantage.

I believe that Grains Australia Limited (GA) could deliver this pathway within its current market insights and market delivery pillars.

The objective is to shift selected grains from commodity positioning to problem-solving food ingredients, increasing demand elasticity and resilience against global commodity pricing.

Pathway B: Establishing an Australian Grains Marketing Body

Pathway two would require a change in legislation should GRDC resources be used for funding. Alternatively, it would require other funding options to be explored.

This option is modelled on CAB which was set up as a separate marketing organisation alongside the AAA.

Governance options could include a new statutory marketing corporation or an industry-owned commercial partnership model sitting alongside RD&E. The structure must remain industry-controlled, operate on a pre-competitive basis, and avoid distorting exporter competition.

Funding options may include allocating a portion of the existing levy, securing government co-investment, introducing a voluntary levy across processors and bulk handlers, or adopting a blended model.

A formal roadmap should then be prepared for the Federal Agriculture Minister outlining legislative requirements, transition arrangements and clear separation between RD&E and marketing functions.

Clarity of roles is critical. Research must remain research. Marketing must focus on premium capture, not generic promotion.

3. Establish a Pre-competitive, Food-Focused "Australian Grains Value Platform".

Figure 29. An example of a consumer-facing, food-based logo which could be used as the face of a value creation platform for the Australian grains industry. (Source: A. Wiese / ChatGPT)

Create an industry-owned platform that is focused on "food" not "grain".

- Develop validated consumer-facing stories that are backed by facts and connect at a consumer level.
- Invest in the development of a consumer-facing logo that is consistent across all storytelling in the Australian grain industry.
- Link Australian grain qualities to food outcomes.
- Provide market-ready assets to exporters and manufacturers.
- Align with existing sustainability frameworks.

Any future platform should have the following guiding principles:

- Remain industry controlled.

Creating Value at a Commodity Level.

- Operate on a pre-competitive basis.
- Deliver measurable farm-gate return.
- Avoid distorting exporter competition.
- Focus on premium capture, not volume promotion.
- Be independently evaluated.

This should not be a retail logo, but a structured value platform that exporters and processors can leverage by building greater trust and connection with their consumers.

(The above example of a logo is for illustration purposes only. The author recommends investing in professional logo development services. Please refer to the following article in Attachments: DSD Agrifood Branding Analysis 02.03.16).

4. Build an “Australian Grains Food Library”

Establish a centrally governed digital repository which is discoverable on digital platforms containing consumer-facing stories.

Expand this library to house stories specific to the range of Australian grains.

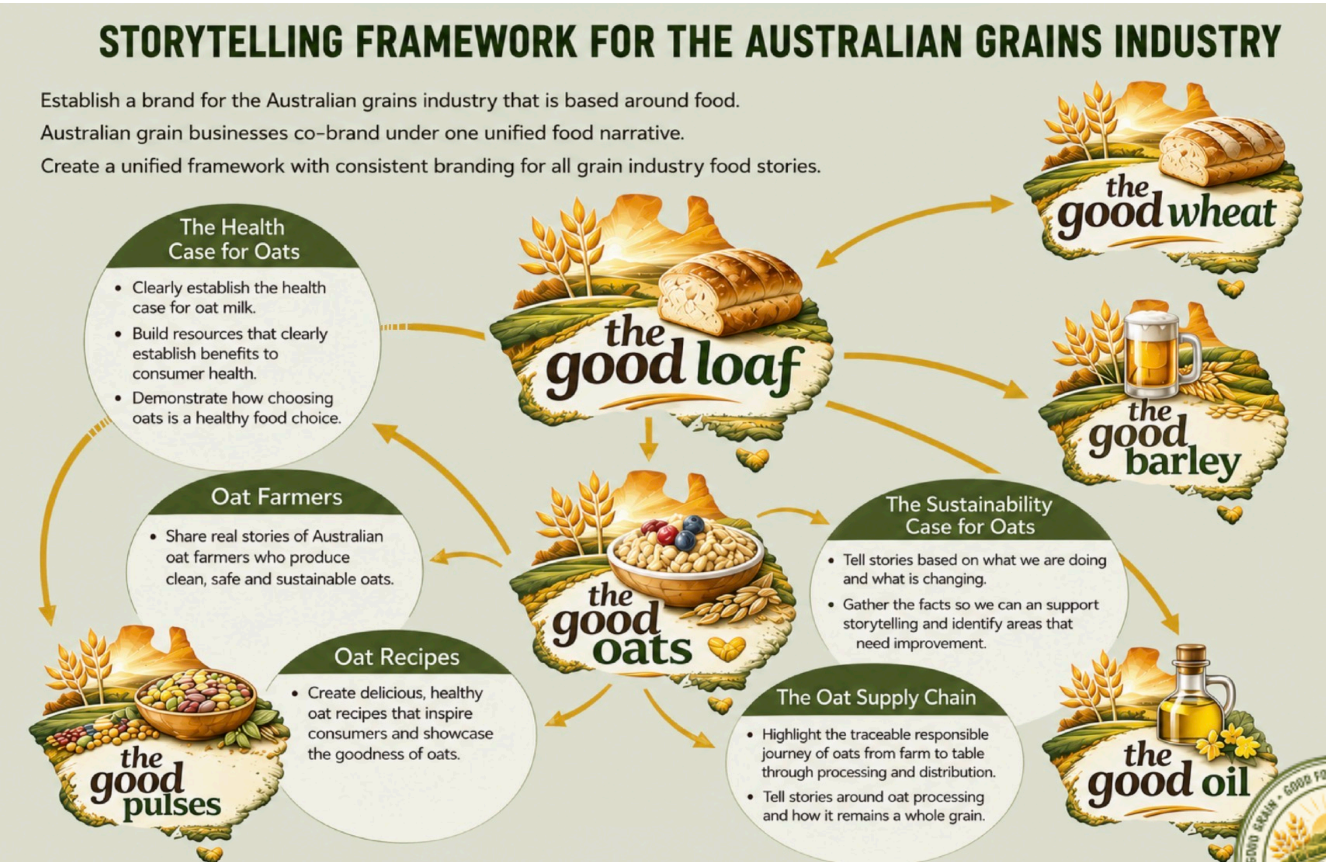


Figure 30. An example of how the logo could be expanded out to focus on stories related to specific Australian grains. (Source: Author / ChatGPT).

Establish resources to curate the library to ensure that content is factual, relevant and fits within a framework established by industry.

Topics covered could include:

- Healthy food choices
- Recipes
- Food quality
- Unique foods that utilise the unique attributes of Australian grain (for example: Australian noodle wheat)
- Sustainable food choices
- A shared passion around caring for natural capital
- Trusted supply chain (consumers knowing that farmers are thinking about the people eating the food being produced)
- Food safety
- Plant based protein sources
- A consumer connection back to the farmer producing the food
- A consumer connection to Australia, or a region of Australia
- A connection to family farms
- The reason why you would choose foods made from Australian grains over other food choices.

5. Conduct market research to identify where our grains solve problems.

- Look at competing foods, not just competing origins of grain.
- Place a filter over competing foods to identify where our grains could provide solutions.
- Conduct analysis of potential new markets.
- Shift selected grains from commodity inputs to problem-solving food ingredients.

6. Package up the resources to assist with market development.

- Package up resources and storytelling that grain customers can use to help them develop new markets where analysis has shown the potential for value creation.

Creating Value at a Commodity Level.

- Translate agronomic advantage into consumer value. For example, “high protein wheat” becomes “Stronger dough. Better bread. The good loaf.”
- Use ambassadors to promote Australian grain storytelling.

7. Implement, Pilot and Measure Impact

Once the platform, resources and governance are established, implementation should commence through targeted pilot programs with selected grain types, food manufacturers and export markets.

The goal would be to support our grain markets with the resources that our customers can use to create a connection between Australian grain and the food their consumers are eating.

The purpose of the pilot phase is to test whether coordinated consumer-facing storytelling influences purchasing decisions, creates new market opportunities and ultimately delivers measurable farm-gate value.

Implementation should include:

- Partnerships with food manufacturers, retailers and food service companies to embed Australian grain stories within branded food products.
- Development of clear key performance indicators (KPIs), including:
    - Farm-gate price premiums.
    - Market growth.
    - Consumer awareness and trust.
    - Adoption by exporters and manufacturers.
    - Return on industry investment.
- Independent evaluation at predetermined intervals.
- Refinement of the platform based on market evidence before broader rollout.

The platform should operate as a continuous improvement system, with research, consumer insights and market performance regularly informing future investment priorities.

Australia has spent generations producing some of the world's best grain. The next generation of leadership is not only about growing more—it is also about ensuring the world understands why Australian grain is worth choosing over other competing foods.

Figure 31. Examples of how the logo could be used to build recognition of Australian grains in food products. (Source: A. Wiese / ChatGPT).

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Attachments

Attachment 1: Branding Agricultural Commodities.

Attachment 2: 1439-DSD Agrifood Branding Analysis 02.03.16