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National Food Industry Strategy Review 2006

13 July 2006

This survey is being conducted by KPMG for the Department of Agriculture, Fisheries and Forestry (DAFF) to assist in evaluating the appropriateness, effectiveness and efficiency of the *National Food Industry Strategy* (NFIS).

The aim of this survey is to:

- understand the key growth issues and strategies adopted by food organisations
- understand the food manufacturing and processing industry issues and trends facing the Australian food industry: domestically and overseas
- gain insight into the role of the Australian government and other bodies in addressing the national food industry issues and trends, and assisting industry growth
- assess the current impact of the NFIS program components and its potential future focus.

By participating in this survey, you have the opportunity to provide input into the assessment report being done by KPMG, which will be one of a number of elements that the Australian Government will use to determine the future role and direction of the NFIS and its programs.

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**National Food Industry Strategy Review 2006**

This survey is being conducted by KPMG for the Department of Agriculture, Fisheries and Forestry (DAFF) to assist in evaluating the appropriateness, effectiveness and efficiency of the National Food Industry Strategy (NFIS).

All individual responses will remain strictly confidential with the data combined to provide an aggregate indication of the status of the food industry.

Please read all questions thoroughly, including these instructions, which will assist you in completing the survey and providing accurate answers.

Please note that your participation in this survey is of value to us even if certain sections or questions are not relevant to your organisation.

Depending on the relevance of the various sections of the survey to your organisation, it may take up to 30 minutes to complete.

You will need to respond to the questions by selecting an appropriate box, filling in a percentage or writing in your comments.

If you have any queries or would prefer to complete the questionnaire with one of the KPMG consultants, please contact Nick Scudamore-Smith by telephone on +61 3 9288 6953 or by email: nscudamoresm@kpmg.com.au

In line with privacy regulations, completion of this survey form implies your willingness to participate in the research.

Please record the time you have taken to complete the survey and enter this in the last question.

All survey respondents will receive a brief summary of the results as a token of our appreciation of your participation. By entering your contact details we will be able to return the summary to you.

How to complete the survey

1. Launch survey by clicking on the KPMG banner above or click on the button below.
2. Complete online survey.
3. Select 'Send' to submit the survey.



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National Food Industry Strategy Review - Survey Questionnaire

1 FOOD MANUFACTURING AND PROCESSING INDUSTRY ORGANISATION PROFILE

1) Administration questions (free text)

a) Name of company: _____

b) Address: _____

c) Telephone: _____

d) Contact person: _____

e) Position: _____

f) Email: _____

2) Which of the following best describes the food manufacturing and processing industry sector your organisation operates in? **(Multiple responses ok)**

1	<input type="checkbox"/>	Bakery products
2	<input type="checkbox"/>	Beverages (fruit juice, bottled water, etc. excludes wine)
3	<input type="checkbox"/>	Confectionery
4	<input type="checkbox"/>	Dairy products
5	<input type="checkbox"/>	Flour milling and cereal foods
6	<input type="checkbox"/>	Fruit and vegetable/horticulture
7	<input type="checkbox"/>	Meat and meat products
8	<input type="checkbox"/>	Oils and fats
9	<input type="checkbox"/>	Pet food
10	<input type="checkbox"/>	Seafood
11	<input type="checkbox"/>	Sugar
12	<input type="checkbox"/>	Wine
13	<input type="checkbox"/>	Other (Specify) _____ _____

3) Please categorise your organisation's manufacturing & processing operations. **(select one)**

1	<input type="checkbox"/>	Australian operations only
2	<input type="checkbox"/>	Australian owned business with domestic and overseas operations
3	<input type="checkbox"/>	Overseas owned business with operations in Australia
4	<input type="checkbox"/>	Other, please specify _____ _____

4) What is the postcode of the location of your organisation's Australian head office?

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- 5) In which state/territory does your organisation have operations, and define whether these operations are based in metropolitan or regional locations (metro/regional/both)? **(Multiple responses ok, indicate the number of sites)**

1	<input type="checkbox"/>	New South Wales/ACT <input type="checkbox"/> Metro No. _____ <input type="checkbox"/> Regional No. _____
2	<input type="checkbox"/>	Northern Territory <input type="checkbox"/> Metro No. _____ <input type="checkbox"/> Regional No. _____
3	<input type="checkbox"/>	Queensland <input type="checkbox"/> Metro No. _____ <input type="checkbox"/> Regional No. _____
4	<input type="checkbox"/>	South Australia <input type="checkbox"/> Metro No. _____ <input type="checkbox"/> Regional No. _____
5	<input type="checkbox"/>	Tasmania <input type="checkbox"/> Metro No. _____ <input type="checkbox"/> Regional No. _____
6	<input type="checkbox"/>	Victoria <input type="checkbox"/> Metro No. _____ <input type="checkbox"/> Regional No. _____
7	<input type="checkbox"/>	Western Australia <input type="checkbox"/> Metro No. _____ <input type="checkbox"/> Regional No. _____

- 6) Please define your organisation's sales turnover from its Australian operations for the most recent financial year. **(select one)**

		Sales Turnover
1	<input type="checkbox"/>	0 to AU\$99,999
2	<input type="checkbox"/>	AU\$100,000 to \$999,999
3	<input type="checkbox"/>	AU\$1 Million to \$19.99 Million
4	<input type="checkbox"/>	AU\$20 Million to \$49.99 Million
5	<input type="checkbox"/>	AU\$50 Million to \$99.99 Million
6	<input type="checkbox"/>	AU\$100 Million or more

7) Please specify the number of staff employed (full-time equivalent) by your organisation within Australia. **(select one)**

		No. of Employees
1	<input type="checkbox"/>	1 to 20
2	<input type="checkbox"/>	21 to 100
3	<input type="checkbox"/>	101 to 200
4	<input type="checkbox"/>	201 to 500
	<input type="checkbox"/>	501 or more

2 FOOD INDUSTRY ORGANISATION INITIATIVES

Relevant definitions for this section of the survey (ABS Standards)

- **R&D** - creative work undertaken on a systematic basis, in order to increase the stock of knowledge, including knowledge of man, culture and society, and the use of this stock of knowledge to devise new applications.
- **Innovation** - the process of introducing new or significantly improved goods or services and/or implementing new or significantly improved processes. New goods or services or new processes may involve the development of new technology, an adaptation of existing technology to a new use (e.g. electronic commerce), or may be non-technological in nature (e.g organisational and managerial change, some changes in marketing).

8a) Select the top **three** priority growth initiatives that related to your organisation over the past five years 2001-2006 **(select three options)**

		2001 - 2006
1	<p>Improving the cost competitiveness of the supply of services and products in existing operations and markets:</p> <p>If specifically domestic or overseas please select:</p> <p>a. Domestic</p> <p>b. Overseas</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2	<p>Differentiating through new product and service innovation and R&D:</p> <p>If specifically domestic or overseas please select:</p> <p>a. Domestic</p> <p>a. Overseas</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3	New export market entry	<input type="checkbox"/>

		2001 - 2006
4	<p>Expansion of capacity and capability within existing operations:</p> <p>If specifically domestic or overseas please select:</p> <p>a. Domestic</p> <p>b. Overseas</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
5	<p>Acquiring new manufacturing or processing operations:</p> <p>If specifically domestic or overseas please select:</p> <p>a. Domestic</p> <p>b. Overseas</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
6	<p>Developing partnerships with commercial organisations:</p> <p>If specifically domestic or overseas please select:</p> <p>a. Domestic</p> <p>b. Overseas</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
7	<p>Other (please specify – allow multiple entries):</p> <p>_____</p>	<input type="checkbox"/>
8	Don't know	<input type="checkbox"/>

8b) Select the top **three** priority growth initiatives that related to your organisation over the next five years 2007-2012 (**select three options**)

		2007 - 2012
1	<p>Improving the cost competitiveness of the supply of services and products in existing operations and markets:</p> <p>If specifically domestic or overseas please select:</p> <p>c. Domestic</p> <p>c. Overseas</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

		2007 - 2012
2	<p>Differentiating through new product and service innovation and R&D:</p> <p>If specifically domestic or overseas please select:</p> <p>b. Domestic</p> <p>Overseas</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3	<p>c. New export market entry</p>	<input type="checkbox"/>
4	<p>Expansion of capacity and capability within existing operations:</p> <p>If specifically domestic or overseas please select:</p> <p>d. Domestic</p> <p>d. Overseas</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
5	<p>Acquiring new manufacturing or processing operations:</p> <p>If specifically domestic or overseas please select:</p> <p>b. Domestic</p> <p>c. Overseas</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
6	<p>Developing partnerships with commercial organisations:</p> <p>If specifically domestic or overseas please select:</p> <p>b. Domestic</p> <p>Overseas</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
7	<p>Other (please specify – allow multiple entries):</p> <p>_____</p>	<input type="checkbox"/>
8	<p>Don't know</p>	<input type="checkbox"/>

- 9) Approximately what proportion of your organisation's gross annual sales revenue from Australian operations is invested in **R&D**? (select one option, and if option 1 is selected, indicate the percentage)

Australian Operations Definition: *manufacturing and processing operations within Australia*

1	<input type="checkbox"/>	We are currently undertaking R&D	_____ %
2	<input type="checkbox"/>	We are planning to commence R&D activity in the future, hence currently the proportion is 0%	
3	<input type="checkbox"/>	We do not undertake any R&D and have no intention of commencing	
4	<input type="checkbox"/>	Don't know	

- 10) If your organisation is planning to increase (or start) expenditure on **R&D** in the next 5 years, what is your optimal expenditure level? (please select one option)

1	<input type="checkbox"/>	R&D as a % of annual sales _____ %
2	<input type="checkbox"/>	We do not undertake any R&D and have no intention of commencing
3	<input type="checkbox"/>	Don't know

- 11) What prevents your organisation from investing in or increase your investment in **R&D** ?
(Multiple responses ok)

1	<input type="checkbox"/>	Regulatory activity both in Australia and overseas; (regulatory compliance)
2	<input type="checkbox"/>	Lack of availability of government and industry programmes designed to facilitate R&D
3	<input type="checkbox"/>	Lack of financial incentives for both scientists and entrepreneurs
4	<input type="checkbox"/>	A shortage of skills
5	<input type="checkbox"/>	Inability to commercialise and realise return on investment
6	<input type="checkbox"/>	The long delay to realise return on investment
7	<input type="checkbox"/>	Organisation is too small to warrant the implementation of any R&D programmes
8	<input type="checkbox"/>	Limited access to capital to invest in R&D

9	<input type="checkbox"/>	Lack of direction or support from head office
10	<input type="checkbox"/>	Lack of knowledge of where to source R&D expertise
11	<input type="checkbox"/>	Not relevant to our business
12	<input type="checkbox"/>	Other (please specify – allow multiple entries): _____ _____
13	<input type="checkbox"/>	Don't know

12) Rate the importance of the following **innovation and R&D** categories to your organisation.
(select an option for each category)

		Very important	Somewhat important	Somewhat unimportant	Very unimportant	Don't know
1	New product development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	New process or production techniques	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Packaging development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Waste management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Supply chain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Information technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Customer and consumer insights	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Environment conservation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Other initiatives (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13) Are you currently involved with any joint or collaborative **innovation or R&D** ventures?
(multiple responses ok)

1	<input type="checkbox"/>	Yes, with a co-operative research centre
2	<input type="checkbox"/>	Yes, with a research provider
3	<input type="checkbox"/>	Yes, with other industry organisations
4	<input type="checkbox"/>	Yes, with industry associations
5	<input type="checkbox"/>	Yes, with supply chain services providers (eg, 3 rd party logistics providers)
6	<input type="checkbox"/>	Yes, Other (please specify) _____
7	<input type="checkbox"/>	No
8	<input type="checkbox"/>	Don't know

3 FOOD INDUSTRY ORGANISATION EXPORT ACTIVITY

14) Which of the following best describes your organisation's export activity? **(select one)**

1	<input type="checkbox"/>	We currently export some or all of our products
2	<input type="checkbox"/>	We do not currently export but intend to export within the next 5 years
3	<input type="checkbox"/>	We do not export and have no intention of exporting
4	<input type="checkbox"/>	Other (please specify): _____ _____

If you have selected option 1 or 4, proceed to Q15

If you have selected option 2, proceed to Q19

If you have selected option 3, proceed to Section 4, Q 23

15) What proportion of your organisation's gross annual sales revenue from Australian operations for the most recent financial year is attributed to export sales?

1	<input type="checkbox"/>	Exports as a % of annual sales revenue: _____%
2	<input type="checkbox"/>	Don't know

- 16) To which countries does your organisation currently export? Select from the list of countries provided below and allocate a percentage of your organisation's total export revenue. Please ensure that the sum of your answers equals 100%. **(Multiple responses ok)**

1	<input type="checkbox"/>	China	_____ %
2	<input type="checkbox"/>	Hong Kong	_____ %
3	<input type="checkbox"/>	India	_____ %
4	<input type="checkbox"/>	Indonesia	_____ %
5	<input type="checkbox"/>	Japan	_____ %
6	<input type="checkbox"/>	Malaysia	_____ %
7	<input type="checkbox"/>	Singapore	_____ %
8	<input type="checkbox"/>	South Korea	_____ %
9	<input type="checkbox"/>	Taiwan	_____ %
10	<input type="checkbox"/>	New Zealand	_____ %
11	<input type="checkbox"/>	USA	_____ %
12	<input type="checkbox"/>	Europe (exclude UK)	_____ %
13	<input type="checkbox"/>	UK	_____ %
14	<input type="checkbox"/>	Other (please specify- allow multiple countries): _____	_____ %

17) Approximately what proportion of your organisation's export revenue is from the following market sectors? **(Multiple responses ok)**

1	<input type="checkbox"/>	Processing	_____ %
2	<input type="checkbox"/>	Wholesale	_____ %
3	<input type="checkbox"/>	Food Service	_____ %
4	<input type="checkbox"/>	Retail	_____ %
5	<input type="checkbox"/>	Other (please specify): _____ _____	_____ %
6	<input type="checkbox"/>	Don't know	

18) For export sales, which of the market channels listed is the most important for your organisation? **(select one)**

1	<input type="checkbox"/>	Direct sales
2	<input type="checkbox"/>	Domestic sales department
3	<input type="checkbox"/>	Export sales department
4	<input type="checkbox"/>	Traders domestic
5	<input type="checkbox"/>	Traders international
6	<input type="checkbox"/>	Own overseas office
7	<input type="checkbox"/>	Freight forwarder
8	<input type="checkbox"/>	Distributor
9	<input type="checkbox"/>	Other (please specify): _____ _____
10	<input type="checkbox"/>	Don't Know

19) Approximately what percentage of your Australian operations gross annual sales revenue would you expect to derive from export sales in 5 years time? **(select one)**

1	<input type="checkbox"/>	Exports as a % of annual sales revenue in 5 years time: _____%
2	<input type="checkbox"/>	Don't Know

20) Which of the following export markets present a major growth opportunity for your organisation in the next 5 years? Select from the list of countries provided below. **(Multiple responses ok)**

1	<input type="checkbox"/>	China
2	<input type="checkbox"/>	Hong Kong
3	<input type="checkbox"/>	India
4	<input type="checkbox"/>	Indonesia
5	<input type="checkbox"/>	Japan
6	<input type="checkbox"/>	Malaysia
7	<input type="checkbox"/>	Singapore
8	<input type="checkbox"/>	South Korea
9	<input type="checkbox"/>	Taiwan
10	<input type="checkbox"/>	New Zealand
11	<input type="checkbox"/>	USA
12	<input type="checkbox"/>	Europe (exclude UK)
13	<input type="checkbox"/>	UK
14	<input type="checkbox"/>	Other (please specify-allow multiple countries): _____

21) What do you perceive Australia's strengths to be in food export markets? **(Multiple responses ok)**

1	<input type="checkbox"/>	Product quality
2	<input type="checkbox"/>	Environmental friendliness
3	<input type="checkbox"/>	Innovative products
5	<input type="checkbox"/>	Price competitiveness
6	<input type="checkbox"/>	Food safety
7	<input type="checkbox"/>	Product traceability
8	<input type="checkbox"/>	Product source authenticity, ethnicity
9	<input type="checkbox"/>	Regulatory control and systems
10	<input type="checkbox"/>	Brand recognition
11	<input type="checkbox"/>	Seasonality (counter to northern hemisphere)
12	<input type="checkbox"/>	Other (please specify – allow multiple entries): _____ _____
13	<input type="checkbox"/>	Don't Know

22) How important do you believe a coordinated 'Brand Australia' approach is in export markets for the industry? **(please select one)**

1	<input type="checkbox"/>	Very important
2	<input type="checkbox"/>	Somewhat important
3	<input type="checkbox"/>	Neither important nor unimportant
4	<input type="checkbox"/>	Somewhat unimportant
5	<input type="checkbox"/>	Very unimportant
6	<input type="checkbox"/>	Don't know

4 NATIONAL FOOD INDUSTRY ISSUES & TRENDS

23) From the list of food industry issues and trends defined below, rate the impact of each issue on your organisation's bottom line performance? (select an option for each issue/trend)

		Strong favourable impact	Moderate favourable impact	Neither favourable or unfavourable impact	Moderate unfavourable impact	Strong unfavourable impact	Don't know
1	Complex retailer and other customer requirements						
	Domestic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Overseas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Consumer demand preference for 'health and wellness' products:						
	Domestic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Overseas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Consumer demand preference for convenience products						
	Domestic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Overseas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Retail sector consolidation and buying power						
	Domestic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Overseas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

		Strong favourable impact	Moderate favourable impact	Neither favourable or unfavourable impact	Moderate unfavourable impact	Strong unfavourable impact	Don't know
5	Retailer generic brand and product ranges Domestic Overseas	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
6	Product traceability and risk management systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Food safety and quality systems and supporting activities (e.g. auditing): Domestic Overseas	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
8	Availability of skilled labour	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Labour force costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Cost and availability of relevant and useful market intelligence about overseas markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Cost and availability of supplies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Cost of logistics and transport Domestic Overseas	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
13	Natural resource cost and sustainability (e.g. water, energy)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

		Strong favourable impact	Moderate favourable impact	Neither favourable or unfavourable impact	Moderate unfavourable impact	Strong unfavourable impact	Don't know
14	Investment capital availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	Packaging differentiation and innovation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	New information technologies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17	R&D access and capability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18	Collaborative partnerships						
	Domestic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Overseas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19	Ease of market access (eg, quarantine, prohibition)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20	Existence of bilateral / regional trade and investment arrangements between Australia and target market	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21	Cost of market access (eg, tariffs, charges)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22	Strengthening of the Australian dollar (eg, to US\$0.85)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23	Weakening of the Australian dollar (eg, to US\$0.60)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24	Other (please specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5 THE ROLE OF THE AUSTRALIAN GOVERNMENT AND OTHER AGENCIES

24) What should be the **primary** focus of the Australian government's role in the national food industry (**rank the list from 1 to 4 in order of importance, 1 being the least important, 4 being the most important**)

1	<input type="checkbox"/>	Supporting access to and growth in export / global markets
2	<input type="checkbox"/>	Supporting competitiveness in domestic markets
3	<input type="checkbox"/>	Supporting innovation
4	<input type="checkbox"/>	Developing the industry economic and regulatory framework

25) Select the option that best reflects your organisation's opinion on who should address each issue defined below. (**select an option for each issue**)

		Industry	Government agencies	A collaboration between industry and government	Don't know
1	Provision of global food industry trends and growth opportunity data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Building and leveraging a coordinated Brand Australia in export markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Facilitation of collaborative organisation and association networks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Development of commercial networks, expertise and market information in export markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Development of technical expertise and regulatory information in export markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Commercialisation of innovation for demand side growth initiatives (ie, New product, packaging)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

		Industry	Government agencies	A collaboration between industry and government	Don't know
8	Commercialisation of innovation for supply side growth initiatives (ie, cost reduction, process improvement, waste mgmt)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Development and co-ordination of standards , and regulation management systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Negotiation for the removal of trade barriers to export markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Coaching and mentoring of industry participants in business growth process development (ie, business planning, demand opportunity commercialisation, developing a culture of innovation)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Facilitating access to capital and funding for business growth initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	Development of world class supply chain infrastructure between Australia and global markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	Development of world class research facilities in Australia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	Development of world class education programmes tailored to the food industry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	Development and management of sustainable environmental services (ie, water)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

		Industry	Government agencies	A collaboration between industry and government	Don't know
17	Other (please specify): _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26) Based on the response to question 25, select and explain the **three priorities** that **government** should address in the **next five years** (either solely or in collaboration with industry).

a) 1 _____
What should the government do:

b) 2 _____
What should the government do:

c) 3 _____
What should the government do:

6 THE NATIONAL FOOD INDUSTRY STRATEGY PROGRAMMES

National Food Industry Strategy Program definitions:

- **Food Innovation Grants programme** – provides grants to food businesses for projects which focus on delivering commercial results through research and development and innovation in product, process or technology.
- **Food Market Development programme** - undertakes projects and activities to improve collaboration between Australian Government agencies (including Austrade), State Government agencies and industry in food export market development activities.
- **Food Chain programme** – provides a platform for the building of food industry skills, capability and knowledge in chain management.
- **Technical Market Access programme** – addresses sanitary and phytosanitary issues that impact on gaining new market access, and the maintenance of existing markets, through the provision of agricultural and veterinary counsellors in export markets, supported by technical specialists in Australia.
- **International food standards initiative (Codex)** – provides funding to increase the level and quality of Australian Government and food industry involvement in development of Codex Alimentarius and other international trade standards, to ensure outcomes are science based and do not act as non-tariff barriers to trade.
- **Food safety and quality initiative** – assists Australian food industry and agribusiness in improving national food safety and quality assurance systems.
- **Food centres of excellence programme** – contributes to establishing Australia as an international centre of excellence for food industry innovation by developing world class human capital in Australian food R&D centres.

27) Do you think the National Food Industry Council is effectively providing a joint industry/government forum to focus efforts, and provide strategic direction for the development of the Australian food industry (select one)?

1	<input type="checkbox"/>	Yes
2	<input type="checkbox"/>	No Please specify: _____
3	<input type="checkbox"/>	Don't know

28) Please indicate whether you are **aware** of the following National Food Industry Strategy programmes and whether you have **participated** in any of them? (select one for each option)

		Aware of	Unaware of	Participated in
1	Food Innovation Grants programme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Food Market Development programme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Food Chain programme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Technical Market Access programme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	International food standards initiative (Codex)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Food safety and quality initiative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Food centres of excellence programme:			
	a. Centre for functional foods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b. Australian food safety centre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*If you identified that you are **unaware of** all of the National Food Industry Strategy programmes, progress to question 31 to complete the survey.*

29) Based on your **organisation's awareness** of the National Food Industry Strategy (NFIS) programmes, in the future will your organisation be likely to: **(select one option for each)**

		Yes	No	Don't Know
1	Be influenced to undertake additional R&D activity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Be influenced to work collaboratively with supply chain partners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Leverage the in-country platforms developed by the food market development programme to increase your export sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Benefit from technical market access activities to overcome barriers to export markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Be influenced to review food safety/quality systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Be influenced to provide input into the Australian Government positions in international food standards development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you have **not** participated in any NFIS programmes progress to question to 31 to complete the survey

30) Select from the list below the **benefits achieved** by your organisation **specifically** through participation in the National Food Industry Programmes. **(multiple responses ok)**

		Food innovation grants programme	Food market development programme	Food chain programme	Technical market access programme	International food standards initiative (Codex)	Food safety and quality initiative	Food centres of excellence programme
1	Development of additional internal innovation and R&D focused programmes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Development of new external R&D partnerships and networks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Development of new external commercial partnerships and networks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

		Food innovation grants programme	Food market development programme	Food chain programme	Technical market access programme	International food standards initiative (Codex)	Food safety and quality initiative	Food centres of excellence programme
4	Knowledge and data of food industry trends and opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Knowledge and data of specific export markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Enhancement of internal business planning and business case development capability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Facilitated entry into a new market that would otherwise not have been penetrated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

		Food innovation grants programme	Food market development programme	Food chain programme	Technical market access programme	International food standards initiative (Codex)	Food safety and quality initiative	Food centres of excellence programme
8	Maintained access to existing export markets with restrictive food regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Enhancement of food safety/quality systems activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	Cost reduction through implementation of initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Revenue increase through implementation of initiatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

31) What should be the priority programmes for a future National Food Industry Strategy? **(free text)**

32) Do you have any other comments or suggestions that you would like to add? **(free text)**

33) Please enter the time you have taken to complete this survey: _____ minutes

We may be contacting a small number of respondents for feedback regarding this survey. To opt out of this process check this box

<input type="checkbox"/>	No, I don't wish to be contacted
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The feedback you have provided to us in this survey will be one of a number of elements that the Australian Government will use to determine the future role and direction of the NFIS and its programs. We will be forwarding to all respondents a brief summary of the survey results.

All individual responses will remain strictly confidential with the data combined to provide an aggregate indication of the status of the food industry.

Thank you for your contribution.