



NZARES

Resilience of NZ's Import and Export Supply Chains

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WHY DID
I DECIDE TO
MUSTER SHEEP,
I ASK MYSELF?



EDUCATION + EXPERIENCE = RESPONSE



"What if we don't change at all ...
and something magical just happens?"

SUPPLY CHAIN STRAIN

...CAUSING
PAIN, MIGRAINE
AND PROFANE
LANGUAGE



Under Threat



SUPPLY CHAIN SUMMARY

Source



Transport



Process



Transform



Distribute



Market
& Sell



Trucks, trains and boats



Selected commercial shipping routes, as of January 2024



Shanghai Containerised Freight Index

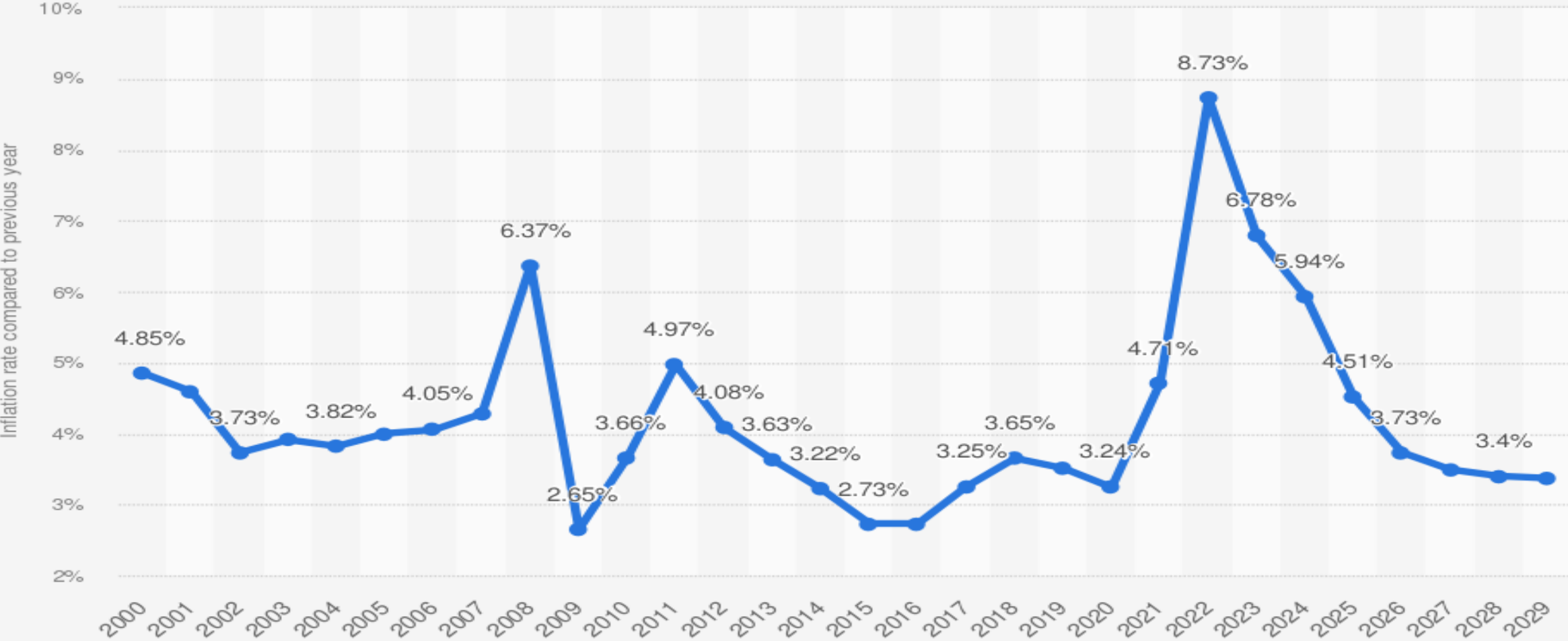


Despite an initial return to pre-pandemic levels, the impact of the Red Sea on shipping costs suggests supply chains remain fragile

Source: ISEG

¹ TEU stands for twenty-foot equivalent unit and is a measure of cargo volume in units of twenty-foot long containers

Global inflation rate from 2000 to 2022, with forecasts until 2028 (percent change from previous year)



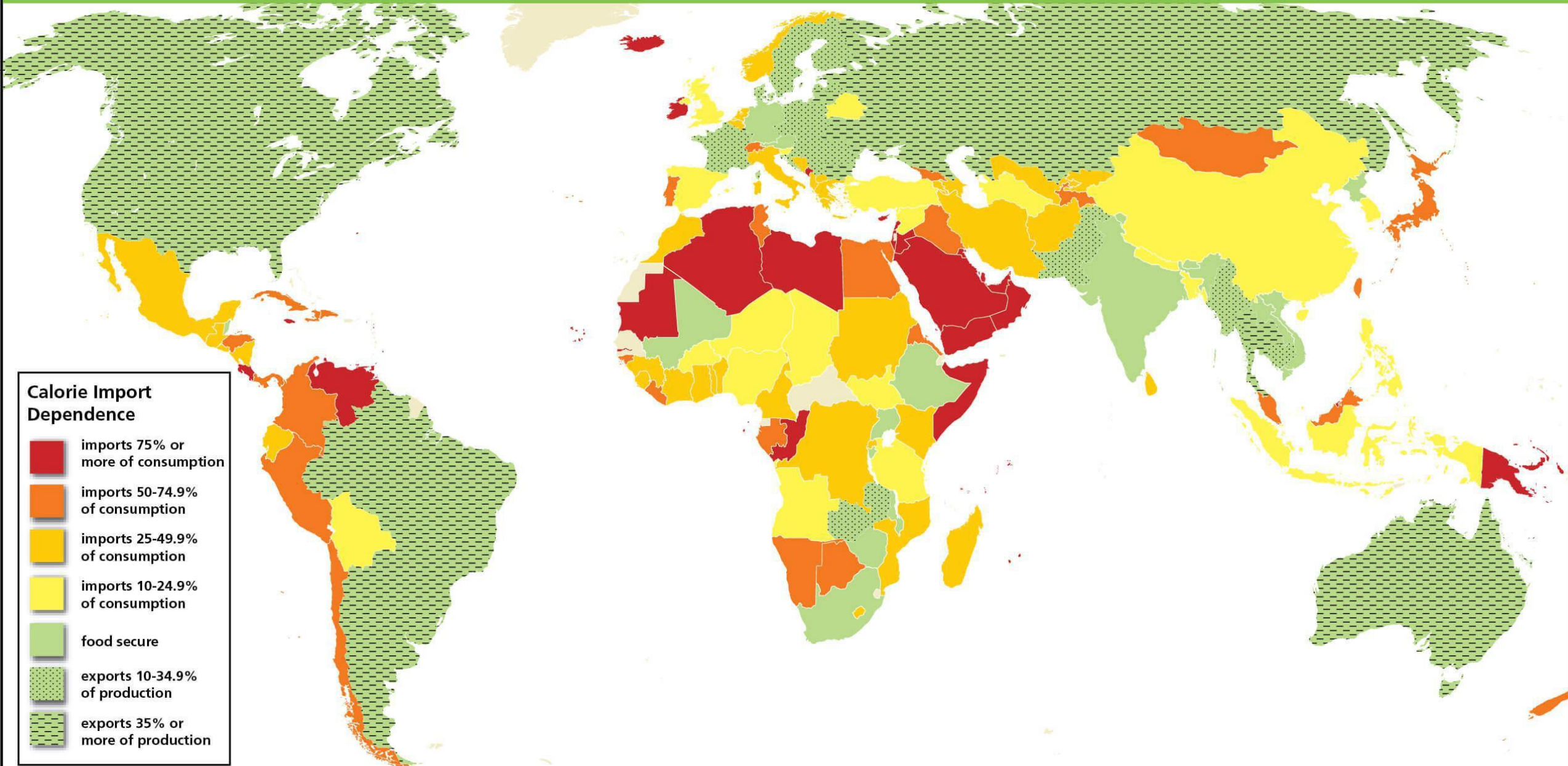
Source
IMF
© Statista 2024

Additional Information:
Worldwide; October 2023

Working Capital and Inventory



Food (In)Security



Trade and consumption of raw maize, wheat, rice, soybeans, and other minor grains for any purpose.

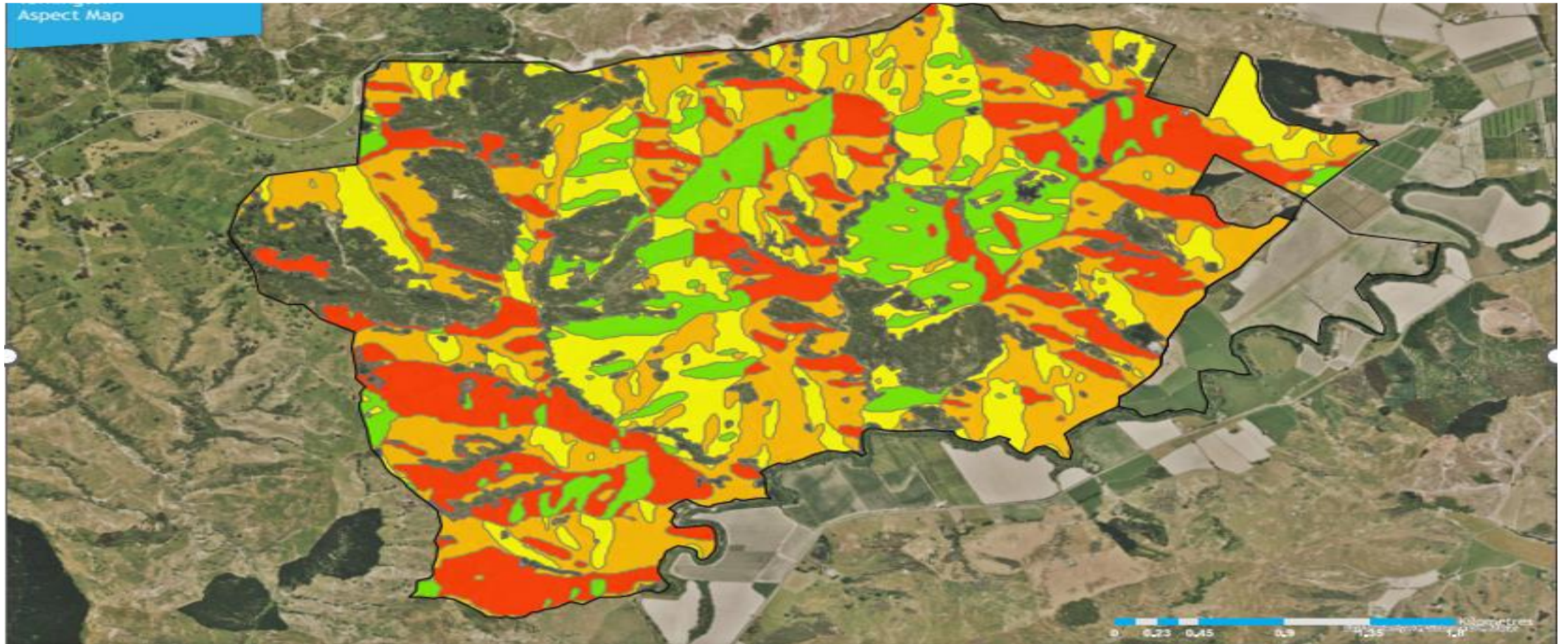
Sources: USDA FAS, UN FAO, and UNCOMTRADE © 2020 Zeihan on Geopolitics



More Extreme Weather Events

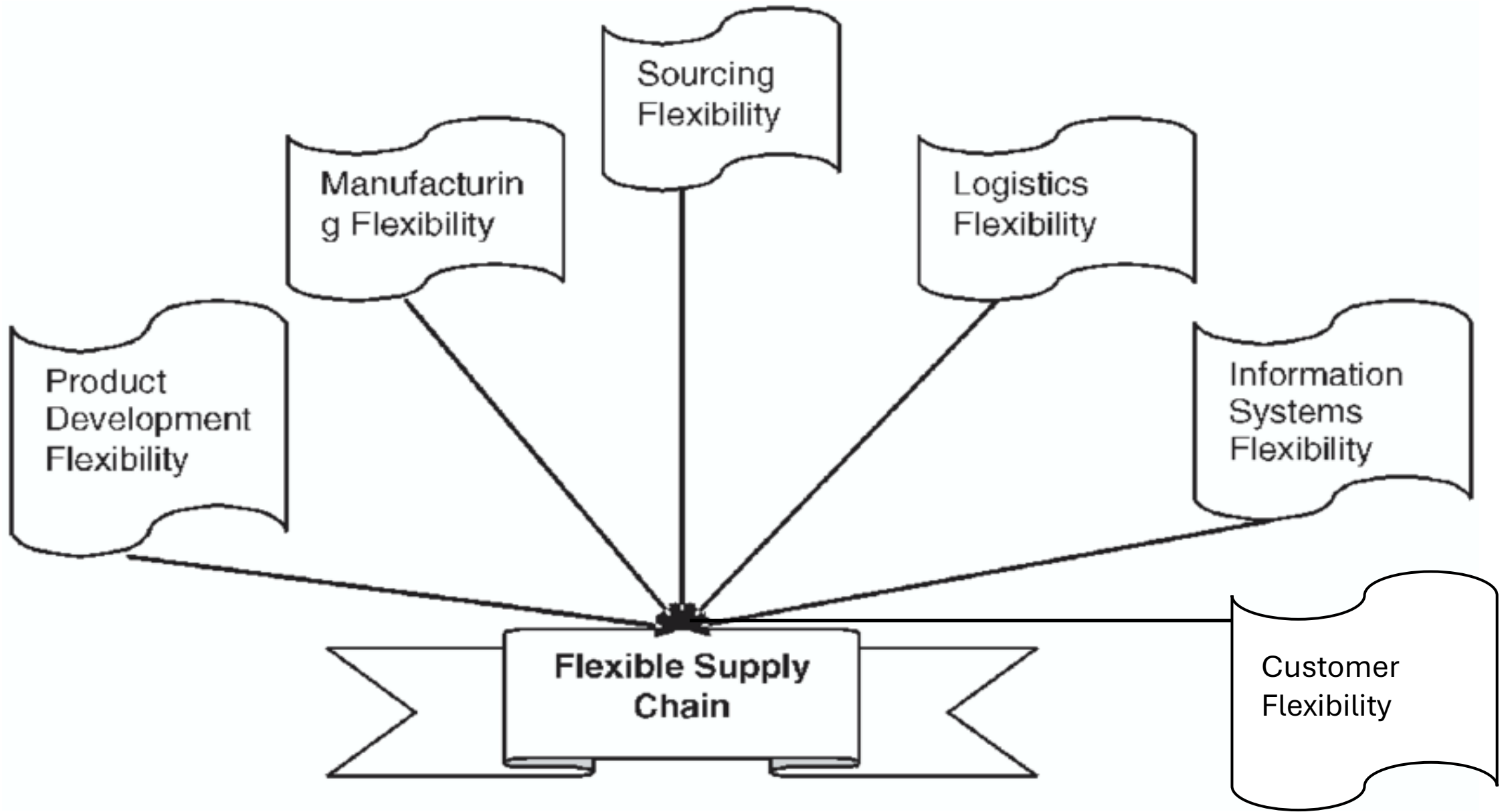
- Northern Hemisphere forecast to be more impacted
- Large Landmass countries more impacted
- Global Food systems will be disrupted
- We are not immune

Farm Data – Increased Use, Decreased Cost



Water Infrastructure Key





Product
Development
Flexibility

Manufacturin
g Flexibility

Sourcing
Flexibility

Logistics
Flexibility

Information
Systems
Flexibility

Flexible Supply
Chain

Customer
Flexibility

Summary

- Supply chains are simple but interdependencies make for complexity.
- Primary producer or the consumer always pays
- Trade Disruptions are normal
- The way we respond determines if a threat or opportunity
- Education + Experience = Response
- Response + Infrastructure = Options and Capacity
- Innovation



Questions?

