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RIDLEY

Department of  
AGRICULTURE  
FISHERIES &  
FORESTRY -  
AUSTRALIA

# RIDLEY AGRIBUSINESS INVESTOR FORUM

## Presentation by: Danny Bourke

### Brisbane April 16, 1999

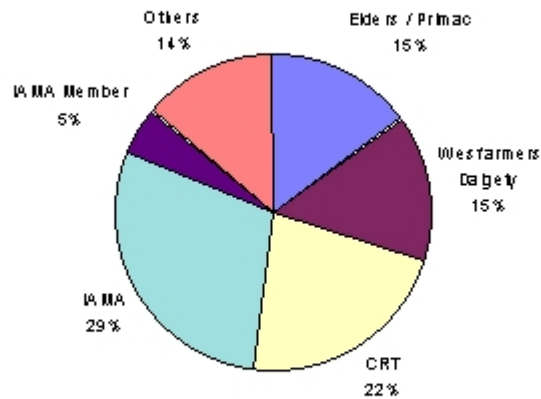


## Overview of IAMA Limited

- Retail farm inputs & advice to all crop and animal health markets
- 70,000 farmer customers nationally
- 300 outlets (50% owned; 50% franchised)
- 29 % market share



## Market Shares - Farm Chemicals



(Based on herbicide sales to Dec 1997 excluding cotton)



## Key Profit Drivers

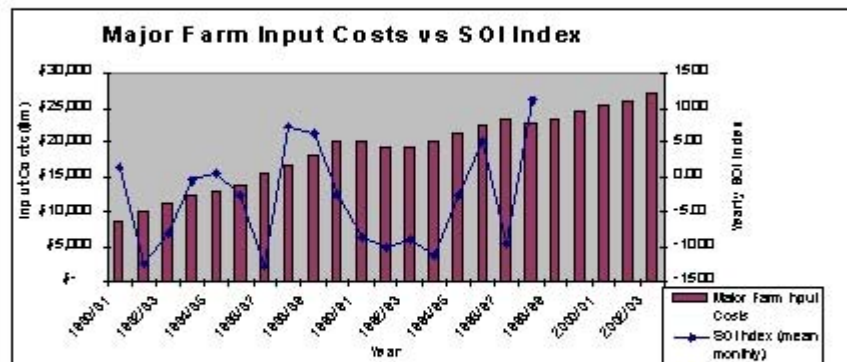
- For industry
  - Increasing yield
  - Improving marketing channels
  - Commodity price sensitivity



## Key Profit Drivers

### ■ For IAMA

- Creation of one national business from nine separate entities
- Improved margins by changing product mix
- Reduced working capital needs
- Reduced overheads by sharing services to branches



## Recent Changes

- Declining number of farm owners
- Merger of Agri-chemical companies
- Rationalization of retail outlets



## Impending Changes

- Further mergers of chemical companies to fund biotechnology developments under “Life Sciences” banner
- Retailers leveraging customer base by expanding services i.e. agronomic, marketing and financial
- Further mergers of farms to access funds and technology to improve yields / profits

