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AGRIBUSINESS TREND AND SALARY REPORT 2019



Salary Trends | Digital Transformation | Women in Ag
Migrant Workers | Hiring a New CEO



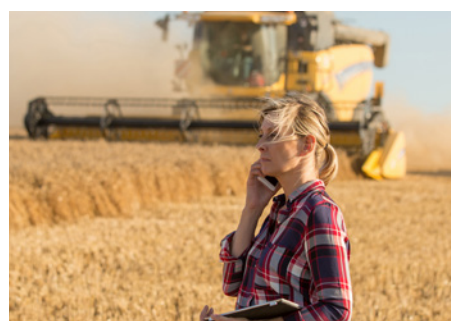
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CEO Selection is Critical to a Company's Future Success.

In our 2015 Trend Report we reviewed the significant changes in agribusiness salaries over the last 20 years (1995-2015) and found that the salaries for most roles had increased at a rate below that of other industry sectors with some notable exceptions, such as agronomists.

In this update we have reviewed the salary changes over the more recent three-year period, from 2015 to 2018. Probably the stand-out feature of this period has been the quite significant increases in farm manager salaries, which in part is due to supply exceeding demand for experienced farm operators in some sectors and may reflect a more corporate approach to farming in other sectors. And it is evident that the continued strong growth of the Australian horticulture sector has been a strong driver for the increase in farm manager salaries and conditions.

In this report we challenge agribusiness CEO's and Boards to better understand and adapt their businesses to the immense wealth of talent that is currently so under-utilized and represented in Australian agriculture, that of women employees. Women now represent over 50% of all graduates in ag-related training courses, but are significantly under-represented in the workforce to the detriment the industry. And it is not just a matter of hiring more women, the whole typically "blokey" culture and work practices and policies have to change in order for women to seriously consider agricultural careers rather than just agricultural training. Australian agriculture will not realise its undoubted potential unless this occurs.



We highlight a really crucial current trend in Australian agriculture in the significantly increasing proportion of new immigrants now filling key roles and providing skills and expertise that will become major drivers of productivity growth into the future. This is another example where innovation and growth in Australian agriculture has been determined by multiculturalism.

Finally, we highlight how the fast-paced business environment of today is changing the skills sought when selecting a CEO and give some pointers on how to maximise the chance of achieving a good fit in this most critical of hires.

Ray

Dr Ray Johnson, B.Sc.Ag., Ph.D. (Rural Science) Senior Agribusiness Consultant & Managing Director, Agricultural Appointments



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Salary Trends in Australian Agriculture



The Agricultural Appointments 2015 Salary & Trend Report looking back over the previous 20 years painted a realistic view of wage growth in Australia during a period of drought, recession and economic uncertainty.

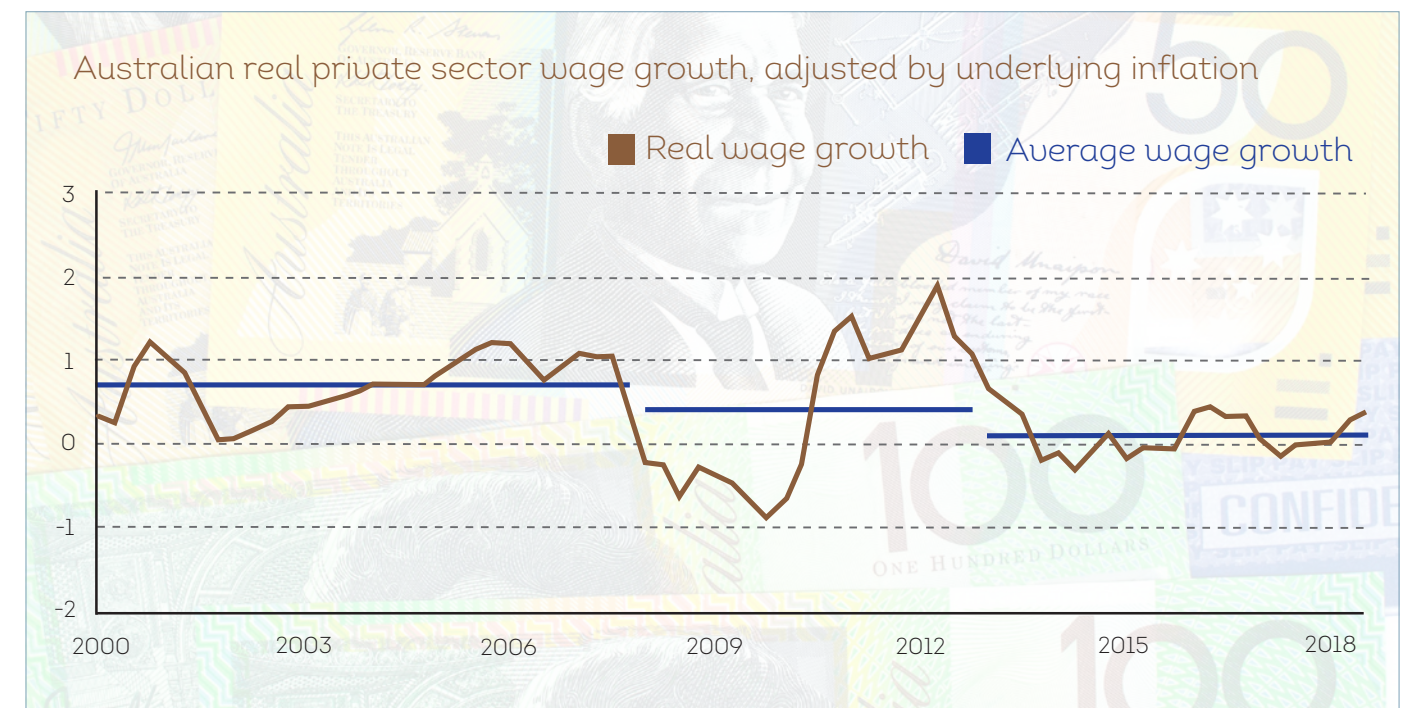
But even in this foreboding climate, there were rays of hope for agricultural, and an acknowledgement of global patterns that are poised to have a positive effect on all sectors related to Australian agriculture.

As we look ahead to the next few years, it's heartening to see these positive predictions being fulfilled, and as long as we acknowledge the changing face of agribusiness, it feels right to say that its future is bold, bright and exciting.

The bigger picture

Let's start with a look at the bigger picture. Wage growth in Australia is currently at a 20-year low with the average annual figure at 1.7 per cent within this period. Wages have fallen since 2013, with the average national wage down approximately 0.5 per cent, thanks to low inflation and a greater proportion of workers in lower-income jobs.

While unemployment in Australia hovers at 5 per cent, this has translated into very little in the way of wage growth, despite skills shortages in various sectors, including agriculture. While these have been alleviated by importing workers under the 457 visa scheme and high rates of immigration, the same factors have contributed



to low wage growth.

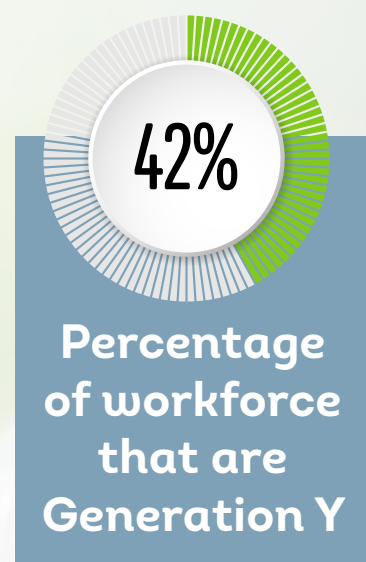
So, does this bleak picture reflect what's been going on in agriculture and how we expect it to look in the coming years?

What about agriculture and what's new?

The key to understanding the future for Australian agriculture is to look further afield to global trends.

Take the phenomenon of the world's economy shifting towards Asia. Over the next 15 years, the Asian middle





class are set to grow at an exponential rate from 28 per cent of the global total reported in 2015 to 64 per cent in 2050, representing a highly influential group. Given Australia’s clean image, excellent record of food quality, and its proximity to these markets, it has been estimated that Australia’s agrifood producers could achieve an additional \$1.7 trillion in revenues from agricultural exports through to the year 2050.

And so we see the anticipation of a high demand for Australia’s agricultural products reflected in rapidly changing workforce trends.

Back in 2015, our analysis showed an average salary of \$70,000 (range \$65,000 to \$75,000) for Sales Manager and Business Development Manager. More recently, data now shows an average base salary of approximately \$100,000 representing a significant increase. It suggests that companies are now willing to structure the remuneration of such roles to attract the right level of skills into their team, and in line with average sales managers’ salaries across all industry sectors.

In 2015 the worst performing salaries were for farm managers, having grown at just 29% of the average over 20 years. A farm manager then could expect to earn an average of \$75,000 (within a range of \$65,000 to \$85,000).

However, our latest figures show that the average farm manager salary has now gone up significantly to \$93,000 (within a range of \$55,000 to \$145,000).

What is interesting is that for other roles more traditionally associated with agriculture, salary growth remains low. Our 2015 report showed that Senior Agronomists were achieving salaries of \$105,000 (in a range of \$80,000 to \$110,000), which represented the strongest salary growth since 1995, and nearly 20 per cent more than the average salary.

However, our most up-to-date figures show a drop in the average salary to \$92,000 (in a range of \$70,000 to \$120,000).

This is surprising considering that agronomy has been affected by skills shortages, though these appear to have

increasingly been filled by new immigrants, who are often very well qualified and are prepared to start out in Australia on relatively lower salary levels to gain experience.

Looking further ahead, the 2015 report highlighted the role of Generation Y (those born between 1980 and the early 1990s) in the future of agriculture as baby boomers head towards retirement. In fact, it is estimated that they are set to make up as much as 42 per cent of the workforce by 2020.

It’s vital to consider this when looking at where agricultural salary trends have been and are going. This multi-tasking generation seeks professional roles in inspirational businesses, averaging more than four careers in their lifetime and staying around two years in each role.

Agriculture and the salaries offered must reflect the values of this generation set to take over as older workers retire. Salaries should match those of their peers to attract dynamic candidates, while the working environment must reflect their energetic and flexible approach.

Taxable Base Salary									
Position	1995			2015			2019		
	Average	Range		Average	Range		Average	Range	
Sales Rep/TM ¹	43,000	40,500	45,500	70,000	65,000	75,000	107,000	85,000	200,000
Agronomist - Sales ²	42,000	36,000	43,000	105,000	80,000	125,000	92,000	70,000	120,000
Farm Manager ³	55,000	50,000	56,000	75,000	65,000	85,000	94,000	55,000	145,000
Australian Average Wage ⁴	34,018			76,768			82,600		
Notes									
1. Tertiary qualifications, more than 5 years experience (n>40)									
2. Agronomy or similar degree, core specialist knowledge and more than 5-7 years experience (n>40)									
3. Tertiary degree or diploma, more than 5 years experience specific to farm type (eg, irrigation) (n>40)									
4. Average Full time Australia wage (ABS 1995, 2014 and 2018)									

To sum up, there are some positive signs for agribusiness remuneration, with some roles experiencing robust growth since our last report in 2015, even against the backdrop of the drought that has affected New South Wales, southern Queensland and eastern Victoria.

Digital transformation and emerging hot roles in Australian Agriculture

The Effect of Digital Technology on Australian Agriculture



Digital technology is transforming many industries at a rate that might be faster than at any time in history. Perhaps one of the most radical transformations currently underway is that of the agriculture and farming industry. Digital is opening up new frontiers of possibilities and allows agriculturalists to push the envelope of what is possible. Technology is beginning to enable farmers to grow more sustainable crops that live longer and provide more nutrients than ever before; technology also allows them to do that more safely and cost-effectively.

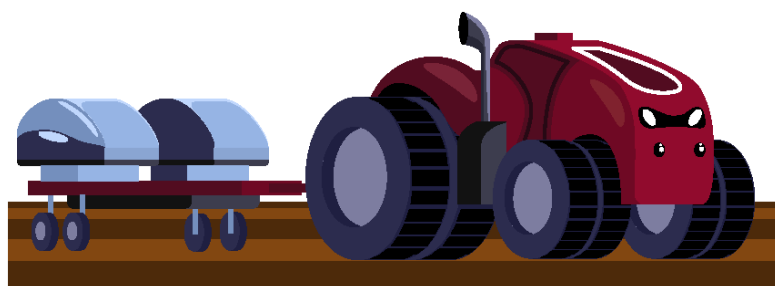
That's not all technology is doing to the agriculture industry, though; it's also given prominence to an important and growing job category: agricultural engineering. Here are some of the technological advancements currently underway in the industry, along with the skills that tomorrow's future agricultural engineering teams will need to succeed in the field.

Technological Advances Underway

Sensors and IoT

Sensors connected to the Internet of Things enable agriculturalists to better monitor the status of many of their inputs and outputs. Air and soil sensors allow farmers to track air and wind conditions that might affect their crops, as well as soil pH, nutrient content, and more. Sensors embedded in machinery can alert mechanics when the devices are likely to suffer from a mechanical failure, reducing downtime and avoiding costly damage. Livestock biometrics leverage technology to relay vital information in real time.

The result of all of these different capabilities is a dramatic increase in efficiency and a decrease in human error. The use of sensors is already transforming the way agriculturalists manage their crops and livestock, and they are expected to play an increasing role in the coming years.



AI & Machine Learning

Perhaps one of the most promising technologies for the industry, AI and machine learning have the potential to revolutionize every step of the agricultural value chain. They can detect which traits and genes might be best of crop production in a given area, allowing farmers to choose the crops and plant breeds that are best for their specific geographical needs.

AI can also analyze crop yields to make recommendations about which crops to plant where on a farm, how much and which kind of fertilizer to apply, and more. This has the potential to increase yields and reduce the number of inputs required to produce them.

Drones

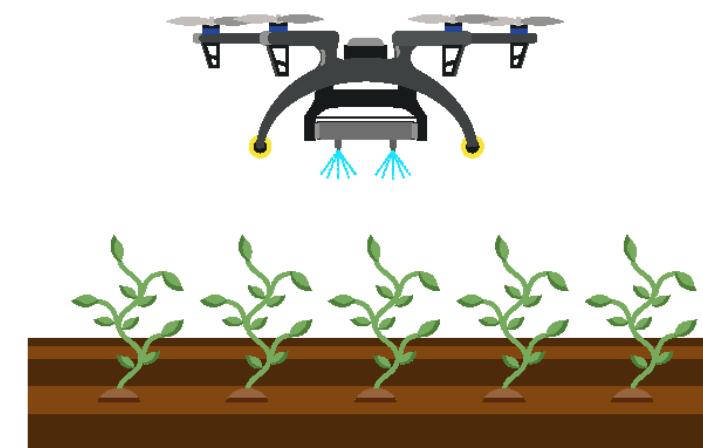
Drones are already being leveraged by farmers to visual their crops from an aerial perspective, allowing them to monitor the status of their investment more thorough and cost-effectively. Drones are also being used to more precisely apply pesticides and other chemicals to crops without penetrating groundwater. Recent studies have shown that drones can be up to five times more efficient at applying these chemicals when compared to other types of machinery.

Robotics & Automation

Another important development in the field, robotics can potentially reduce the need for the abovementioned chemicals by as much as 90%. Robots can be used to automate many of the functions currently performed by humans, such as weeding, harvesting, transplanting, plowing and soil maintenance.

RFID sensors

As consumers become more informed and begin to demand more information about the foods they're consuming, RFID will play an important role in providing that information. The technology can allow



consumers to track details about their food, such as the farm where it was produced and the time it took to arrive from that farm to their grocery store. In the event of an outbreak, the same technology could be used to trace the affected produce back to the originating farm to help prevent the spread of disease.

Jobs and Skills Needed in the Industry

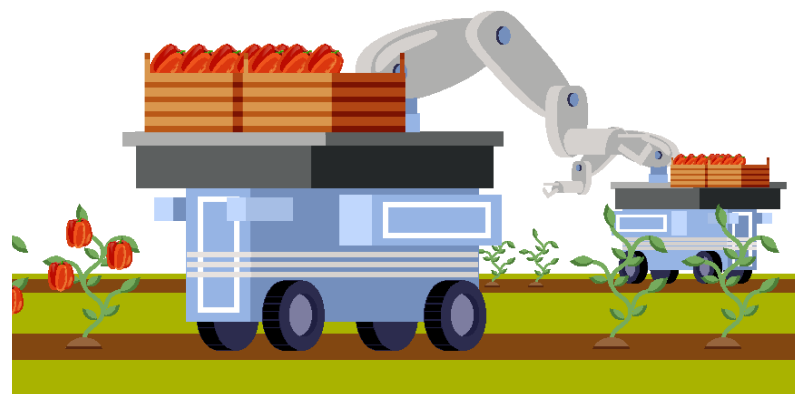
This digital transformation is undoubtedly going to create a whole host of new employment opportunities in the field of agriculture and agricultural engineering. Jobs such as scientists, software analysts, engineers, researchers, and supply chain managers will all exist in ways never before seen in the industry. To fill all of these roles effectively, job-seekers considering a career in the industry should make sure they possess the following skills.

The “STEM” Skills

Science, technology, engineering, and mathematics will all play an important role in the operation and maintenance of the complex digital technologies required to make all of its potential benefits a reality. The owner of a farm will not be the same person who will design the complex systems that allow for its efficient management, nor will they be the ones to organize and analyze all of the data created by those systems.

Research

Access to a broader and more detailed range of inputs and insights will open up a whole world of possibilities as it relates to research and hypothesis testing. The ability to analyze data and develop a hypothesis to be tested – say for example, that planting a specific breed of corn in a certain location in the field will yield more profit than



planting cabbage – will be of tremendous value to farmers in the near future.

Communication Skills

In addition to hard skills such as engineering and technological know-how, soft skills such as communications and interpersonal skills will begin to play an increasing role in the industry. As data becomes more readily available in the industry, the ability to transform that data into knowledge and insights and then share it with others is going to be as important as anything else.

Problem-Solving Skills

When a piece of equipment fails, or a test doesn't go as expected, agricultural engineers must have the problem-solving skills to troubleshoot the issue, identify its potential source, and remedy the problem so that operations can continue. Given the complexity these systems can present, the ability to reason through an obstacle rationally and efficiently will be highly valued.

Conclusion

The world of agriculture is rapidly transforming, thanks to the incorporation of digital technology in new and exciting ways. Hiring managers and job seekers alike must stay up-to-date and informed on the transforming nature of the skills and capabilities required to maximize their chances of securing the highest-potential opportunities and attracting the talent required for their operation to remain competitive in the evolving technological environment.



Women in Australian Agriculture

Are more women now being employed in the Australian agriculture sector?

More women than ever before are now choosing professions in the agricultural sphere, fulfilling roles which are highly technical, and developing and displaying extremely advanced skillsets. With this in mind, it should follow that females are now highly sought after employees, and that their employment rate in this industry is high.



52%
OF STUDENTS ON
UNIVERSITY COURSES
FOR AGRICULTURE,
ENVIRONMENT AND
RELATED STUDIES
ARE WOMEN.



Surely, anyone – male or female – with such technical expertise should find no end of opportunities in the farming and agriculture sector. But is this really the case?

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How the other half lives

It's certainly true that the male to female ratio for agriculture-related courses is now around 50/50. The latest statistics from University Rankings Australia show that women in fact make up 52% of students on courses for agriculture, environment and related studies.

This shows that advances have been made in recent years. The paper Agriculture - from macho to gender balance by J.E. Pratley reminds us that women were excluded from agricultural courses until the 1970s, but that it took until 2003 to reach gender balance in this area, some 15 years after it had been achieved across all university subjects.

Mind the gap

So far, so good. But does this translate to more women actually being employed in agriculture? Statistics say not, or at least not yet. The WGEA (Workplace Gender Equality Agency) report from November 2018 Australia's gender equality scorecard found that despite women

making up 50.1% of the Australian workforce, the agriculture, forestry and fishing sector comprises only 34.8% female employees, while a mere 16.9% of managers in this field are women. To add insult to injury, there is a pay gap of \$23,564 in favour of men.

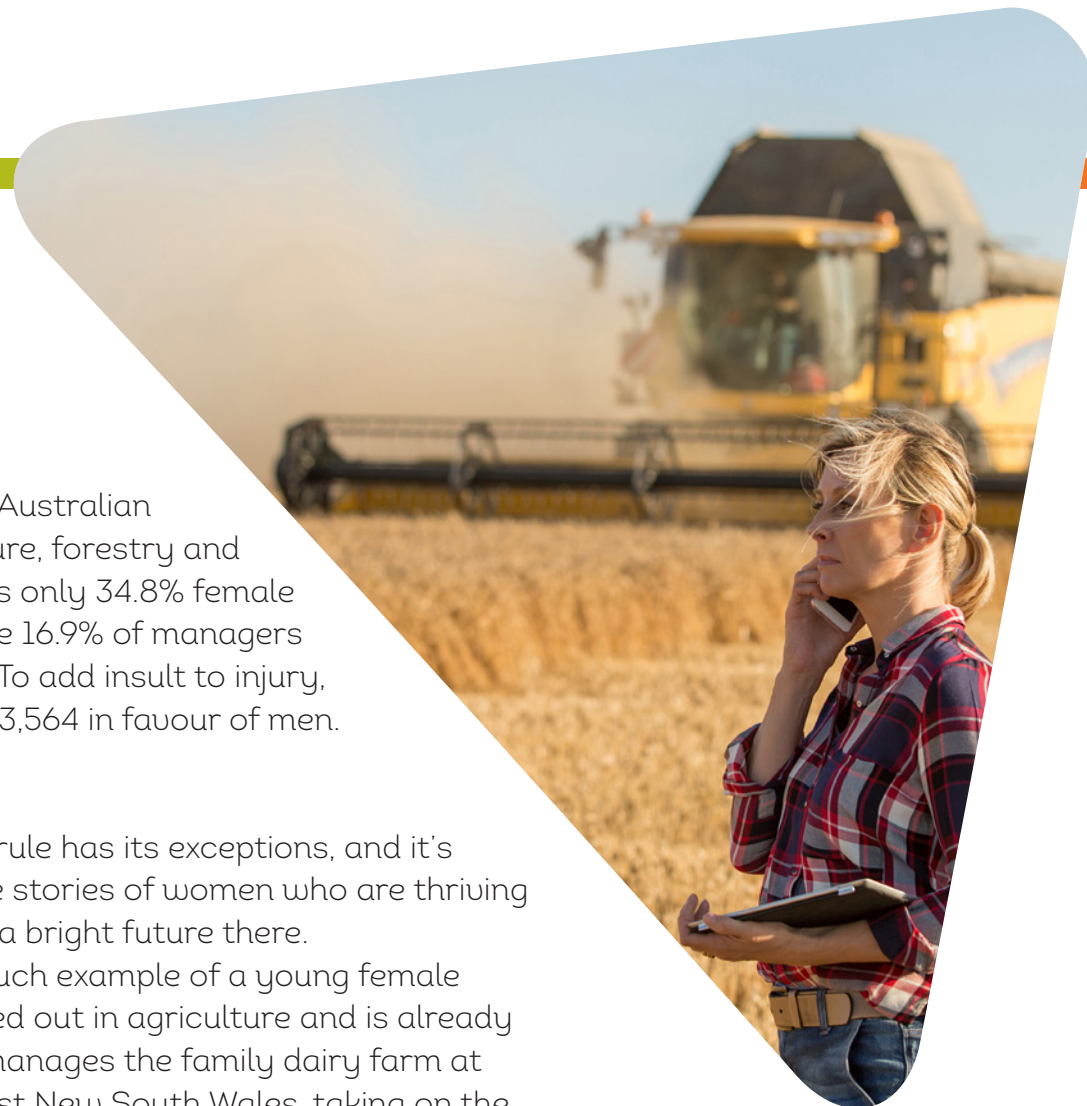
The future's bright

Of course, any general rule has its exceptions, and it's encouraging to hear the stories of women who are thriving in agriculture and have a bright future there.

Sally Downie is one such example of a young female who has recently started out in agriculture and is already making her mark. She manages the family dairy farm at Jemalong in central west New South Wales, taking on the challenges of drought and the pressures of high feed prices and low prices for the farm's produce. It's the love of the profession that keeps her inspired in a tough world, as she says, "I love the cows, being able to work with them every day and the breeding side of it, to be able to breed up and see them produce, and I like how things are constantly changing".

Isabel Coulton is a corporate lawyer practising in the agribusiness sector in the Upper Hunter Valley where she lives with her husband who farms black Angus cattle. She credits her success in this sector to her background in farming, and the flexibility of her chosen career. "Technology allows me to work remotely for clients, delivering the same standard of services I would've otherwise delivered in Sydney," she says. "This is key to me being able to retain bigger agribusiness clients, to avoid them taking their legal work to the larger city firms."

Winemaker Nadja Wallington is another bright star of the agricultural world. After working hard for her degree in viticulture and spending a stint overseas to learn her trade, she settled into her career managing a team



**A MERE
16.9%**
OF MANAGERS
IN THIS FIELD ARE
WOMEN

at Philip Shaw Wines, Orange. She sees her field as woman-friendly, saying, "There are always different personalities you come across that feel as though women aren't as capable, but they're the minority, and it's no reflection of the wine industry". Nadja does her bit for encouraging others to follow in her footsteps, sharing her experiences of working in the viticulture business with other women and reminding them that gender shouldn't be an issue.

Steps in the right direction

While it's true that the viticulture industry is mainly made up of men, the sector is making great strides in encouraging women to pursue their career there. The Australian Grape and Wine body, which represents grape growers in the country, has produced a gender equality charter which includes organising awards to recognise women in the industry, and holding sessions on leadership, equality and diversity at conferences.

The Invisible Farmer Project, the biggest study to date of Australian women who work on the land, seeks to recognise the role women have always played in agriculture, ensuring that it is normalised in the future and that women are recognised as farmers in their own right.

The Future Farmers Network seeks to kickstart and support the farming careers of young people aged 18-35, both male and female, through networking, bursaries and study grants, scholarships and regional support – an essential service given the numbers of women who are recent graduates in agriculture-related areas.

What next?

We know that much progress has been achieved in attaining gender balance across the workforce, but

there is still a long way to go for the agriculture sector. Considering the numbers of women graduating in agriculture-related subjects, and the depth of their expertise now that the field is relying more and more on the latest technology, a sea change is inevitable.

For the future of agriculture, utilising the immense talent pool of women versed in these skills is critical if we are to find a way forward for one of Australia's most essential professions. But this is just the first step. Change starts with employers holding a mirror up to themselves and asking whether their hiring process appeals to women at the outset. The younger generation have a far more balanced approach to jointly share the responsibility of raising a family, so employers need to offer flexible working hours and the ability to work closer to home when necessary for men as well as women. What's more, they need to understand that their culture needs to welcome, encourage and nurture highly qualified women candidates by putting thought into their policies, language, attitudes and environment. It's a responsibility but also an investment which is sure to be the key to the future success of Australian agriculture.



How migrant workers are critical to the future of Australia's agricultural industry

By Jock Collins

Professor of Social Economics, UTS Business School,
University of Technology Sydney

Originally published in **The Conversation**
theconversation.com

More than 900,000 immigrants on permanent and temporary visas enter Australia each year. Most live and work in Australian capital cities; immigrants are more urbanised than the average Australian today.

However, in the last decade or so, new visa pathways have opened up to attract new immigrant workers and their families to the Australian bush. Increased chances of selection attracts permanent skilled immigrants to accept employment in regional and rural towns.

At the same time, increasing numbers of temporary migrants on working holiday, student and skilled 457 visas are attracted to the bush. A new program for Pacific Seasonal Workers has also been introduced.

Immigrant workers add substantially to productivity in the Agricultural industry, a new report reveals.



Growth and benefits

For policymakers, the attraction of getting migrants to rural areas is that it helps reduce labour shortages – particularly during seasonal harvesting peaks – and counteracts the trend of population movement away from the bush to the metropolis.

Immigrants, including refugees, play a critical role in the Australian agricultural industry. Some of these immigrants become entrepreneurs, opening up a business. Skilled immigrants in the agricultural sector were also much more likely to have set up their own business (15%) than those in other industries (9.6%).

When set against the Australian average rate of entrepreneurship (those in the workforce who are self-employed or employers) of 10%, this propensity for immigrant entrepreneurship in the Australian agricultural sector is very encouraging, since entrepreneurs drive employment and productivity growth in the industry.

457 visa skilled workers find employers in the bush eager to sponsor their immigration application, particularly in professional and technical occupations. Working holiday makers fill critical jobs during harvesting and picking seasons.

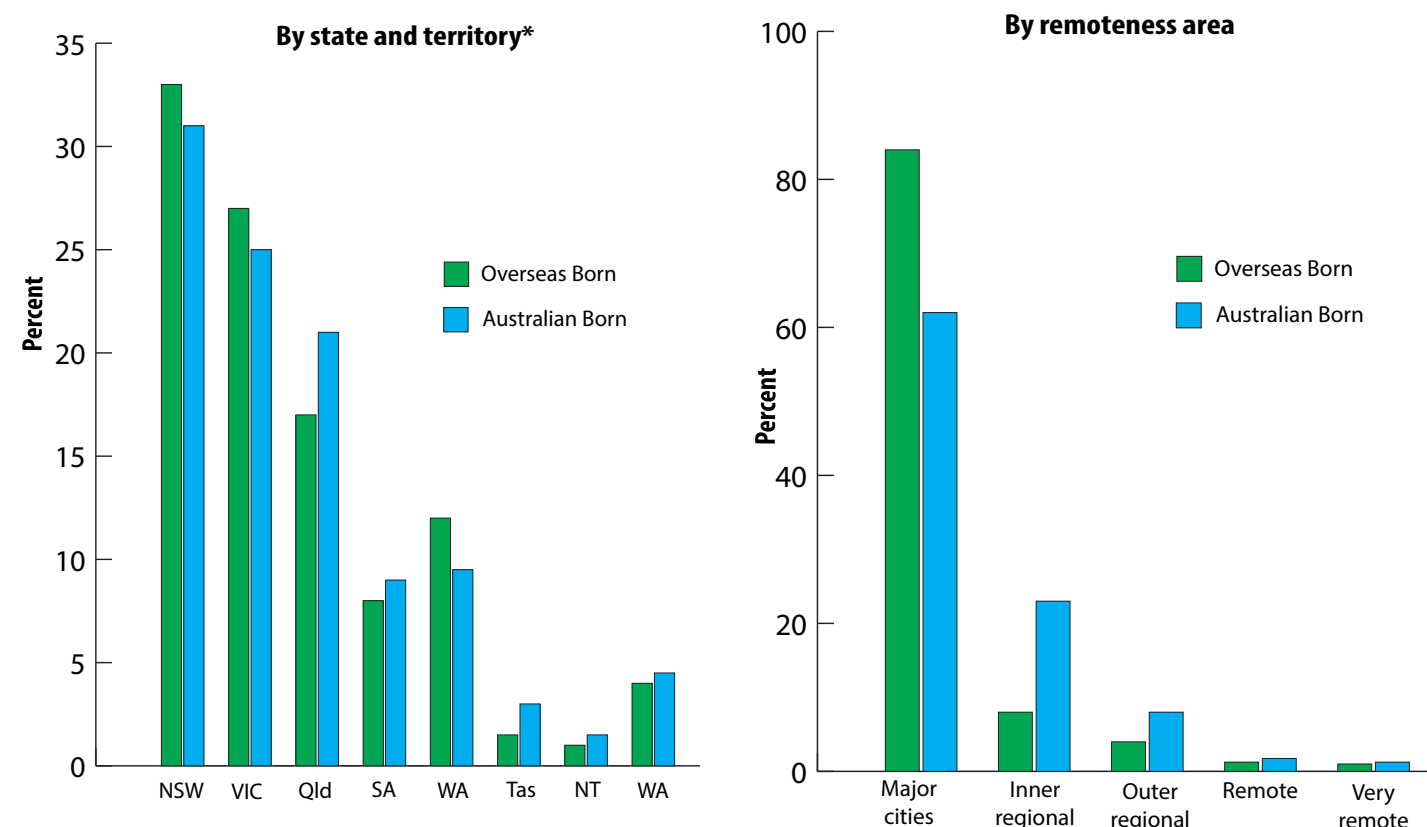
Seasonal workers from the Pacific are eager to supplement the income of their families back home via remittances. They also get to learn new skills.

Immigrant farmers fill the growing intergenerational gap in farm succession and bring with them new technologies and innovations to Australian farming. Zimbabwean immigrant Nicky Mann and her husband introduced hydroponic rose-growing at their NSW central coast operation. Vietnamese and Chinese market gardeners have introduced many new vegetables to expand Australians' food horizons.

Australia takes in about half of all working holiday makers who enter OECD countries. They can work and

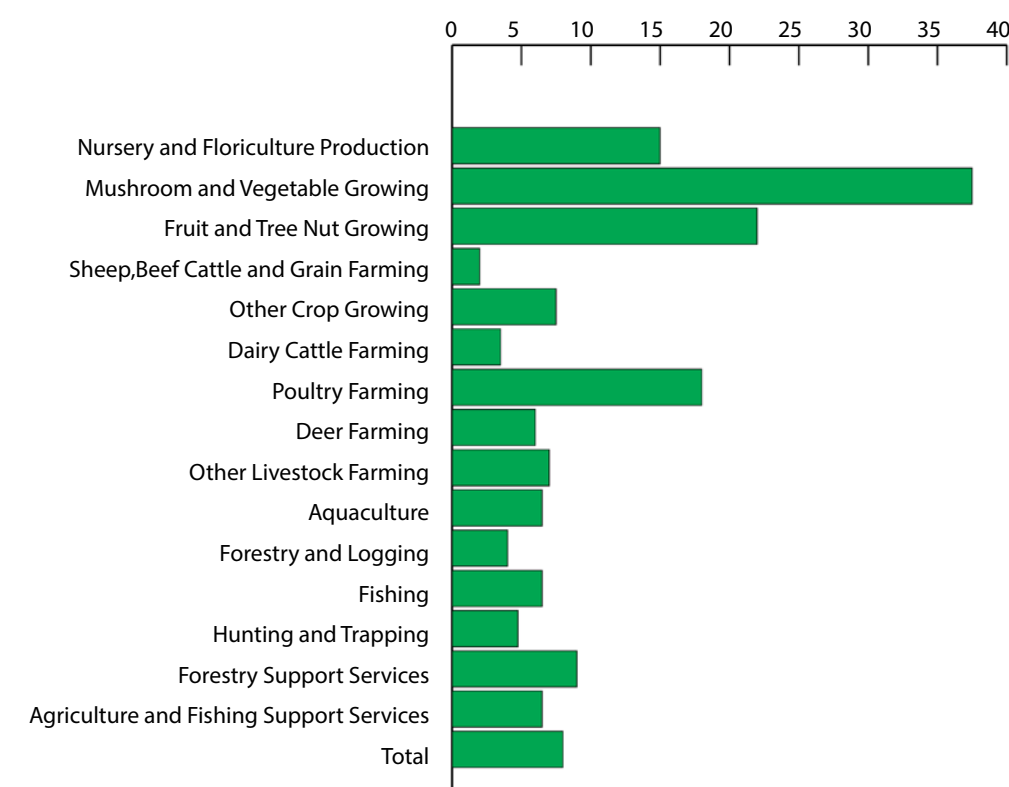
Geographic distribution of Immigrants and Australian-born people, 2011 (See below)

Source: Productivity commission (2015)



Percentage of non-English speaking farmers per industry in 2011 (See below)

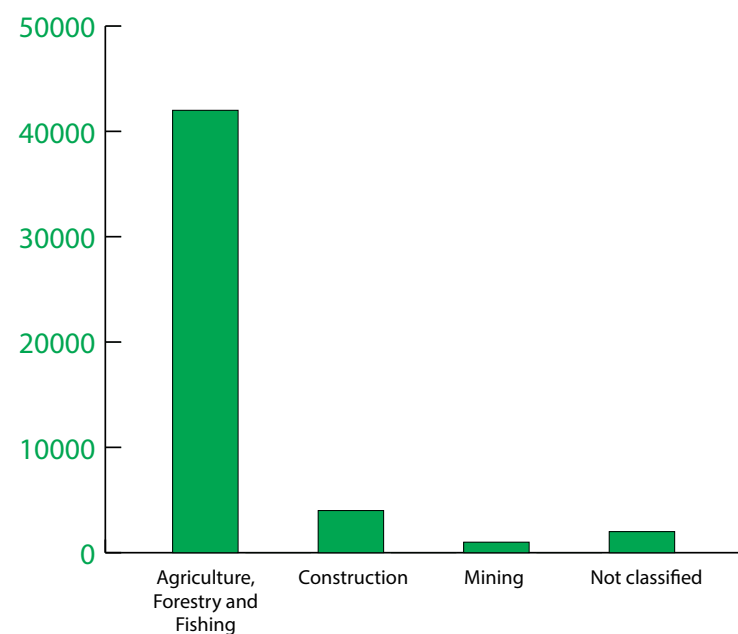
Source: ABS 2011 Census of Population and Housing



travel around Australia from job to job. The carrot is a 12-month extension to their visa if they work more than 88 days in the bush. The agriculture, forestry and fishing industries receive the greatest benefit from this arrangement.

Second Working Holiday visa applications granted in 2013-14 by employer industry (See below)

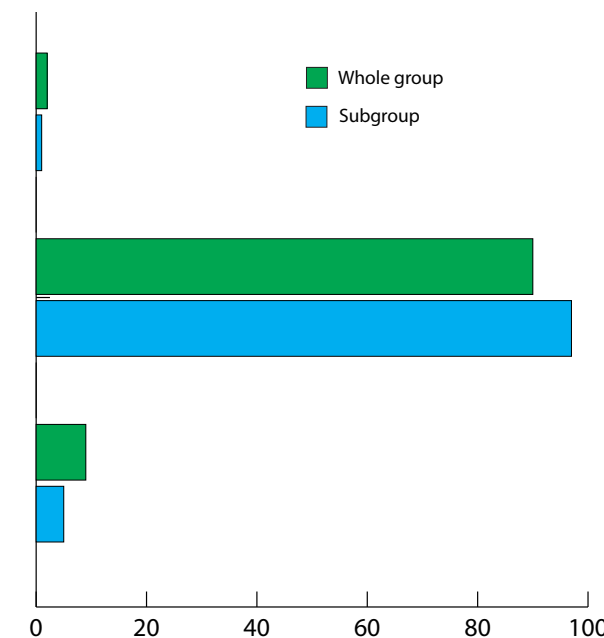
Source: Productivity commission (2015)



Working holiday makers come from more than 20 countries. The UK, South Korea, Ireland, Germany, Taiwan and France provide the largest numbers. Fieldwork with Korean working holiday makers found the majority arrived with the intention of working in the agricultural industry.

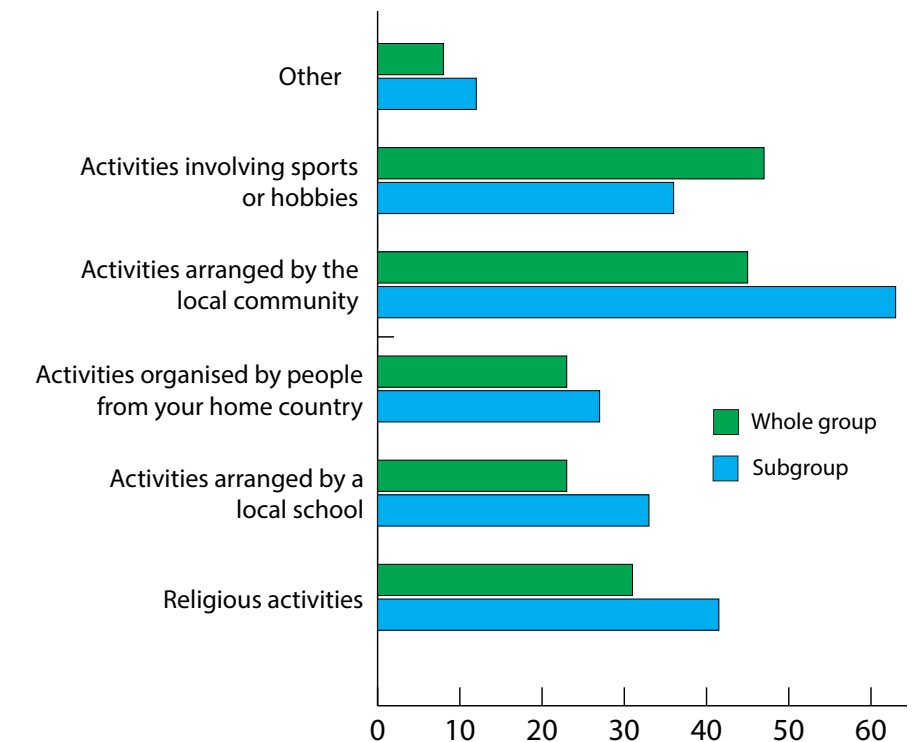
Most reported that the best thing about their experience was that they had good relations with the non-Koreans they worked with in Australia, learned new skills, had the opportunity to improve their English, and received good wages.

The Pacific seasonal workers program allows workers from East Timor, Nauru, Kiribati, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu and Vanuatu to work in low-skilled jobs for up to seven months in a 12-month period. Most work in the horticultural industry.



Whether new immigrants to the Australian bush had visited any of their neighbours since coming to their current city/town - agricultural sector (subgroup) compared to all sectors (whole group)

Activities attended regularly by new immigrants to the Australian bush since coming to their current city/town - agricultural sector (subgroup) compared to all sectors (whole group)



The annual intake has grown from around 400 in 2010-11. It is now an uncapped, demand-driven immigration stream that has expanded to jobs in the broader agriculture industry - including the accommodation sector.

Many permanent and temporary immigrants in the bush, particularly those who work in the agricultural industry, report receiving a warm welcome. This undermines existing stereotypes.



Many skilled permanent immigrants report strong local connections through sporting, community, school and religious social activities in their regional, rural and remote towns.

Those who work in the agricultural industry report a higher level of social engagement – with the exception of sporting activities – than do other immigrants.

However, working holidaymakers had more than three times the rate of finalised Fair Work Ombudsman complaints compared to all other workers in 2013-14. This suggests a high incidence of exploitative work arrangements.

The research also noted numerous examples over time of exploitation of temporary migrants on temporary student, skilled work, working holiday or Pacific Seasonal worker visas. Examples of co-ethnic exploitation are also common.

The research does not clarify the extent to which temporary migrants working in agriculture experience exploitation. However, experiences of migrant worker exploitation do jeopardise future migrant flows into agricultural jobs.

International migration decisions are often based on the experiences of friends and family around the world. This means that unscrupulous employers can undermine the benefits of migrant employment programs for the majority of Australian employers who provide appropriate pay and work conditions.

What Strategies can be used to Minimise Risk in Selecting a New CEO?

By Brett Price Director & Senior Recruitment Consultant
Agricultural Appointments

CEO Selection is Critical to a Company's Future Success

CEO selection is one of the most formidable as well as the most consequential decisions a Board must make. CEO selection is first and foremost about the future. In military terms, it is said one should pick the general for the next war, not for the last one. The same principle applies for selecting modern business leaders who have to not only contend with intense competition, but also adapt to a rapidly changing business environment due to unrelenting technological advances and digital disruption.

These rapid changes are dramatically changing the role of the CEO. Business leaders more than ever before are having to contend with issues they haven't grown up with or encountered in their earlier careers. No longer can it be assumed that the skills required by an incoming CEO should be similar to those of an outgoing CEO.



Re-evaluate Key Skills Required

To minimise the risk of a poor fit in hiring a CEO, a Board should thoroughly analyse the future requirements of the job. What challenges and opportunities that could make or break the company are most likely to be encountered over the next 5 to 6 years, and what critical core skills and capabilities will be required to address these? Quite often a company will already have the technical skills in the existing management team but just lack leadership and direction. In other cases a company may also lack the technical skills required in which case it is hard to imagine a hire being successful unless those skills are acquired in the hiring process. In other situations significant business development skills may be required to address the threats posed by digital disruption, or advanced sales a marketing skills may be required to be able to maximise a unique expansion opportunity.

Each company's situation is different, requiring a different set of skills. With detailed analysis it should be possible to reduce a long shopping list of desired traits to two or three that are critical, closely linked and interdependent. It is important that a Board put the effort in to identify this short list of traits in specific terms – and that they get it right.

This stage of role and skill re-evaluation is an ideal point to confidentially seek advice from a specialist executive search firm which will be able to assist in the process of identifying this short list of core traits. The recruiter you choose should be experienced in the challenges and opportunities typically occurring in your industry together with a strong industry network from where desired skills may be sourced.

Don't Pre-judge the Source of the Candidate

In addition to identifying core skills and qualities required in the role, a Board should keep an open mind as to where the best candidate will come from, and when evaluating a short list undertake thorough analysis as to which candidate is the best fit. It is also important to be cognisant of the fact that every CEO has imperfections. Wise selectors acknowledge these and accept them when they hire. Trade-offs are inevitable. For example many CEO's who come from

a strategy, planning or finance background can be weak on people skills or operating skills. Such gaps can often be easily filled by hiring or promoting others in a supporting role.

Various other tools can be useful to supplement traditional methods of assessing candidate fit. We have access to a wide range of psychometric tests to satisfy a variety of requirements. These not only offer objective measurements of candidate attributes but are a useful means to compare different candidates on specific parameters.

Some Requirements Remain Unchanged

Despite evolution of the CEO role, some core attributes required remain unchanged over time. A CEO works for and under the authority of the Board and therefore must be a good cultural fit with the company and must share the Board's long term vision. In most businesses there is a requirement to have well defined skills in both opportunity identification and opportunity execution. On the personal side it is obvious that a CEO must have a sharp intellect to analyse, conceptualise, debate and formulate strategy.

As an executive search company we have also had to adapt our search and selection methodology to reflect the immense changes in the agricultural industry. Boards are inherently slow to adapt and understand industry changes but it is vital that they also move with the times and understand the requirements of new-age CEO's.

Brett Price



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"We found Agricultural Appointments to be very professional in all aspects of the recruitment process. They kept us up to date with the process, the candidate reports were informative and comprehensive, and they managed the interview day in a very professional manner. We would have no hesitation in using Agricultural Appointments again, it was a very positive and enjoyable experience and we are delighted with the outcome."

Marisa Mitchell, Craiglea Pastoral Pty Ltd

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