



46TH EDITION

PUBLICATION NO. P22001



KEY

FOB = Free on Board
p = Provisional
kgMS = Kilograms of Milk solids
CWE = Carcase Weight Equivalent

SW = Shipped Weight
e = Estimate
N = Nitrogen
CO₂-e = CO₂ Equivalent

ha = Hectares
SU = Stock Unit
P = Phosphorus

\$ = New Zealand Dollars
NA = Not Available
K = Potassium

ACKNOWLEDGEMENTS

This booklet brings together in summary form a selection of information which is available from the recognised sources noted below and to whom thanks are due.

New Zealand Meat Board, Poultry Industry Association of New Zealand, Deer Industry New Zealand, Livestock Improvement Corporation Ltd, Ministry for Primary Industries, National Institute of Water and Atmospheric Research (NIWA), New Zealand Pork, Statistics New Zealand, New Zealand Wool Services International Ltd.

Beef + Lamb New Zealand
Economic Service
PO Box 121, Wellington 6140
E-mail: econ@beeflambnz.com
Phone: +64 (4) 473 9150
NZ Freephone: 0800 BEEFLAMB (0800 233 352)
Website: www.beeflambnz.com

ISSN 2230-5769 print version
ISSN 2230-5777 online version



DISCLAIMER

© 2022 Beef + Lamb New Zealand Limited also referred to as B+LNZ, B+LNZ - Economic Service and the Economic Service.

All rights reserved. This work is covered by copyright and may not be stored, reproduced or copied without the prior written permission of Beef + Lamb New Zealand Limited.

Beef + Lamb New Zealand Limited, its employees and Directors shall not be liable for any loss or damage sustained by any person relying on the information contained in this document, whatever the cause of such loss or damage.

CONTENTS

PAGE

 OVERVIEW	2
 FARMING	5
 LIVESTOCK OVERVIEW	7
 SHEEP	9
 BEEF CATTLE	10
 DAIRY CATTLE	11
 DEER	12
 GOATS	12
 PIGS	12
 MEAT	13
 WOOL	18
 DAIRY	21
 ARABLE	22
 FERTILISER	23
 REVENUE & EXPENDITURE	24
 AGRICULTURAL PRODUCTION & EXPORTS	25

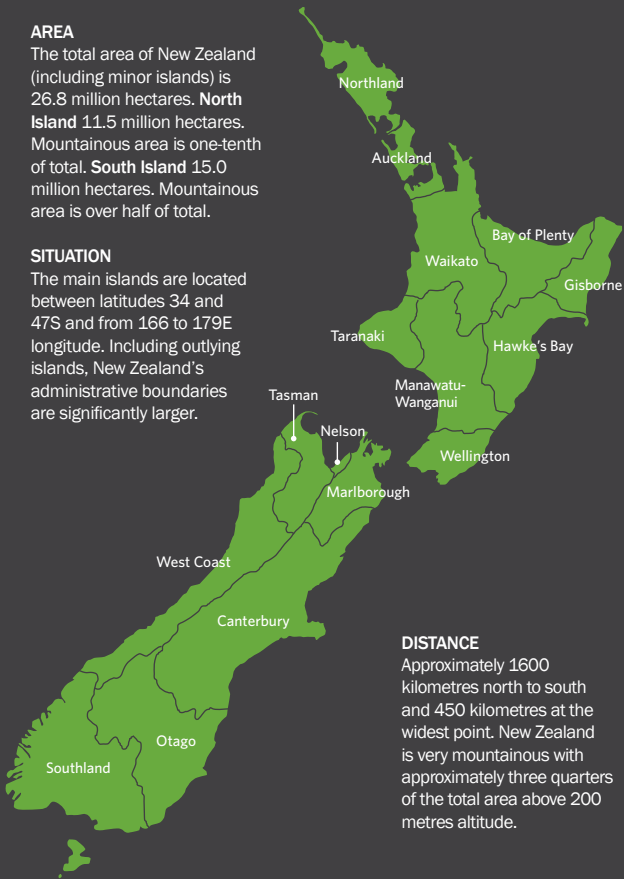
Geography

AREA

The total area of New Zealand (including minor islands) is 26.8 million hectares. **North Island** 11.5 million hectares. Mountainous area is one-tenth of total. **South Island** 15.0 million hectares. Mountainous area is over half of total.

SITUATION

The main islands are located between latitudes 34 and 47S and from 166 to 179E longitude. Including outlying islands, New Zealand's administrative boundaries are significantly larger.



DISTANCE

Approximately 1600 kilometres north to south and 450 kilometres at the widest point. New Zealand is very mountainous with approximately three quarters of the total area above 200 metres altitude.

Climate 2021

2021: New Zealand's warmest year on record

Temperatures Annual temperatures were above average (+0.51°C to +1.20°C above the annual average) for much of Aotearoa New Zealand. Well above average temperatures (>1.20°C above the annual average) occurred in parts of Auckland, Bay of Plenty, Tasman and Fiordland. Near average (within -0.50°C to +0.50°C of average) temperatures occurred in western Waikato, coastal Wairarapa and parts of northern Canterbury and Otago. 2021 was the warmest year on record for New Zealand, based on NIWA's seven-station series which began in 1909.

Rainfall Rainfall was near normal (80-119% of annual normal) for most of the country. Above normal rainfall (120-149% of annual normal) occurred in parts of Taranaki, coastal Manawatū-Whanganui and western Greater Wellington. Parts of Nelson, interior Canterbury and Otago also experienced above normal rainfall.

Sunshine Taranaki experienced New Zealand's highest annual sunshine total during 2021 (2592 hours recorded at New Plymouth).

Soil moisture The majority of the country experienced below normal soil moisture levels during the first three months of the year. Meteorological drought was present for a time in the Far North during January and February. By June, soil moisture had recovered and was largely near normal with the exception of parts of the Hawke's Bay where dryness persisted. Near normal soil moisture persisted through to September. By the end of December, soils were drier than normal across much of the upper North Island and Southland while above normal soil moisture levels were present in much of Taranaki, central and southern Manawatū-Whanganui, Wellington, coastal Marlborough, eastern Canterbury and parts of coastal Otago.

Annual rainfall by district (mm)*

NORTH ISLAND		SOUTH ISLAND	
Kaitiaki	1,351	Nelson	960
Whangarei	1,304	Blenheim	711
Auckland	1,212	Westport	2,121
Tauranga	1,181	Kaikoura	710
Hamilton	1,108	Hokitika	2,901
Rotorua	1,342	Christchurch	618
Gisborne	996	Mt Cook	4,485
Taupo	960	Lake Tekapo	592
New Plymouth	1,386	Timaru	548
Napier	785	Milford Sound	6,715
Wanganui	918	Queenstown	749
Palmerston North	917	Alexandra	359
Masterton	928	Manapouri	1,129
Wellington	1,207	Dunedin	738
		Invercargill	1,149
		Chatham Islands	911

* 30-year average, 1981 - 2010

Source: NIWA

Population

New Zealand's total population is estimated at 5,112,300 at 30 December 2021, an increase of 0.2% over the previous 12 months.

In 2021, an estimated 16% of the population lived in rural areas and 84% lived in urban areas.

From 1996 to 2021, the urban population grew by 1 million (32%), and the rural population grew by 198,500 (32%).



MAJOR AND LARGE URBAN AREAS		MEDIUM AND SMALL URBAN AREAS	
Whangarei	54,300	Pukekohe	26,900
Auckland	1,463,000	Tokoroa	14,300
Hamilton	178,500	Taupo	26,000
Tauranga	155,200	Whakatane	16,700
Rotorua	58,400	Hawera	10,150
Gisborne	37,300	Feilding	17,350
Napier	66,700	Levin	18,800
Hastings	50,100	Paraparaumu	30,600
New Plymouth	58,400	Masterton	21,800
Whanganui	42,300	Blenheim	28,800
Palmerston North	81,500	Greymouth	8,310
Wellington	215,900	Ashburton	20,500
Nelson	51,100	Timaru	28,600
Christchurch	380,600	Oamaru	13,850
Dunedin	105,000	Gore	8,250
Invercargill	49,900		

As at 30 June 2021. Source: Statistics New Zealand



Area of farming land 2021

13.3 million hectares, of which:

7.4	in grassland	1.6	in plantations
2.1	in tussock or danthonia	2.3	in other land or holdings

Farm holdings 2021

In 2021, there were approximately 50,000 farm holdings, irrespective of size or location, with an average area of 267 hectares.

Approximately 91% of commercial sheep and beef farms are owner-operated.

Source: Beef + Lamb New Zealand Economic Service, Sheep & Beef Farm Survey, Statistics New Zealand, 2021 Agricultural Production Survey

Biodiversity

Sheep and beef farms contain 25% of the total native vegetation in New Zealand, comprising 2.8 million ha. Half of the native vegetation that occurs on sheep and beef farms (1.4 million ha) is woody. This represents 17% of the total native woody vegetation in New Zealand. The native woody vegetation on sheep and beef farms is particularly important because it typically occurs in those parts of New Zealand with the least remaining native woody vegetation (and the least public conservation land), especially at lower altitudes and in drier regions.

Source: Desk-top assessment of native vegetation on New Zealand sheep and beef farms, University of Canterbury 2018

Greenhouse gas emissions 1990 to 2020

	TOTAL ¹			PER TONNE OF PRODUCTION CWE ²		
	1990	2020	CHANGE	1990e	2020e	CHANGE
Beef Cattle	5,950	5,981	+1%	13.9	12.9	-7%
Sheep	14,558	8,271	-43%	27.5	17.9	-35%

1 kilotonnes CO₂-e: Carbon dioxide equivalent

2 tonnes CO₂-e: Carbon dioxide equivalent

Source: Beef + Lamb New Zealand Economic Service, Ministry for the Environment

Currently total emissions are 31% below 1990 levels.

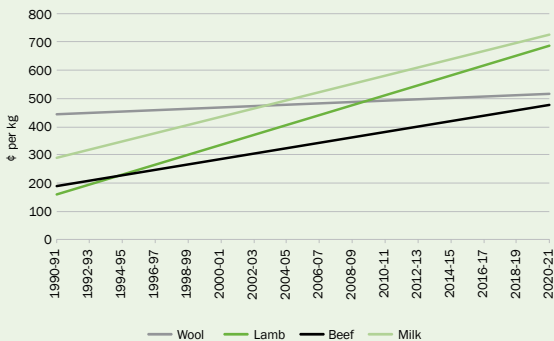
Farms by farm type 2017

	NUMBER OF FARMS ¹		AGRICULTURAL AREA	
	No.	%	ha (000)	%
Sheep & Beef Farming	23,403	45%	8,765	63%
Dairying	11,100	21%	2,442	18%
Cropping	2,991	6%	365	3%
Deer Farming	783	1%	261	2%
Pig Farming	150	0%	8	0%
Poultry	162	0%	4	0%
Forestry	4,194	8%	1,784	13%
Other	9,510	18%	271	2%
TOTAL ALL FARM TYPES	52,293	100%	13,900	100%

1 Includes non-commercial smallholding farms.

Source: Statistics New Zealand, 2017 Agricultural Production Census

Farm-gate price trend



Source: Beef + Lamb New Zealand Economic Service

LIVESTOCK OVERVIEW



Livestock numbers at 30 June (million)

	2011		2021		% CHANGE	
	No.	SU	No.	SU	No.	SU
Sheep	31.1	27.9	25.7	22.9	-17%	-18%
Beef Cattle	3.8	18.6	4.0	19.1	+5%	+3%
Dairy Cattle	6.2	39.4	6.2	39.4	0%	0%
Deer	1.1	1.9	0.8	1.5	-27%	-21%
TOTAL STOCK UNITS¹	-	87.9	-	82.9	-	-6%

1 Includes goats.

Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand

Total Stock Units at 30 June 2021 decreased an estimated 6% compared with 2011. The reduction is largely due to the decline in the number of sheep. While the Stock Unit is a broad measure of pasture demand, it could be argued that livestock in 2021 were better fed and more productive than in 2011.

Livestock productivity

	Unit	1990-91	2020-21p	change
Lambing Performance	lambs/100 ewes	102	130	+28
Lamb Weight	kg/head	13.9	19.1	+37%
Lamb Production	kg/ewe	9.8	21.3	+118%
Wool Production	kg/head	5.3	5.0	-6%
Steer Weight	kg/head	297	310	+4%
Milk Production	kgMS/cow	259 ¹	397	+53%

1 Figure is from 1992-93.

Source: Beef + Lamb New Zealand Economic Service, Livestock Improvement Corporation Ltd, DairyNZ

Livestock by production region at 30 June 2021 (000 head)

	TOTAL SHEEP	TOTAL BEEF	TOTAL DAIRY	TOTAL DEER
Northland/Waikato/BoP	3,101	1,335	2,549	107
East Coast	6,493	960	271	70
Taranaki/Manawatu	3,093	484	856	44
NORTH ISLAND	12,686	2,779	3,676	221
Canterbury/Westland	5,496	712	1,651	306
Otago	4,133	275	256	109
Southland	3,417	198	602	178
SOUTH ISLAND	13,047	1,186	2,509	593
NEW ZEALAND	25,733	3,965	6,185	814

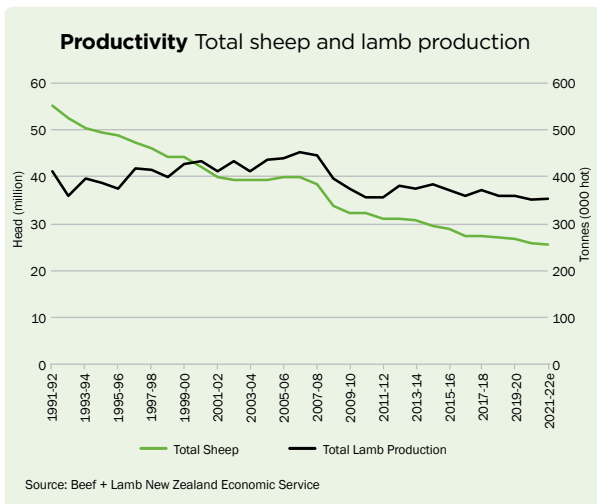
Totals may not add due to rounding.

Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand

Livestock by production region at 30 June 2021 (%)

	TOTAL SHEEP	TOTAL BEEF	TOTAL DAIRY	TOTAL DEER
Northland/Waikato/BoP	11%	34%	41%	16%
East Coast	25%	24%	5%	9%
Taranaki/Manawatu	12%	12%	14%	6%
NORTH ISLAND	48%	70%	59%	31%
Canterbury/Westland	22%	19%	26%	38%
Otago	17%	7%	4%	13%
Southland	13%	5%	11%	18%
SOUTH ISLAND	52%	30%	41%	69%
NEW ZEALAND	100%	100%	100%	100%

Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand



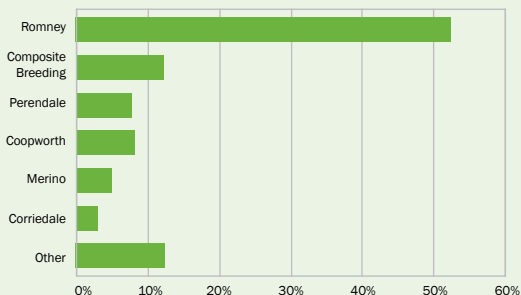
Since 1991-92, the total number of sheep dropped from 55.2 million to 25.7 million in 2021-22e (-53%) while lamb production only decreased from 411,000 tonnes to 354,000 tonnes in 2021-22e (-14%).



Sheep at 30 June 2021

16.3	million breeding ewes
9.4	million ewe hoggets, dry ewes, wethers and rams
25.7	million sheep
-17.3	% on 2011
-1.1	% on 2020

Sheep breeds 2019-20



Source: Beef + Lamb New Zealand Economic Service, Sheep & Beef Farm Survey

Breeding flocks

The major breed in the North Island and southern districts of the South Island is the Romney. Corriedale and Halfbred sheep are mainly in Canterbury, Marlborough and parts of Otago. Merino sheep are predominantly farmed in the South Island high country.

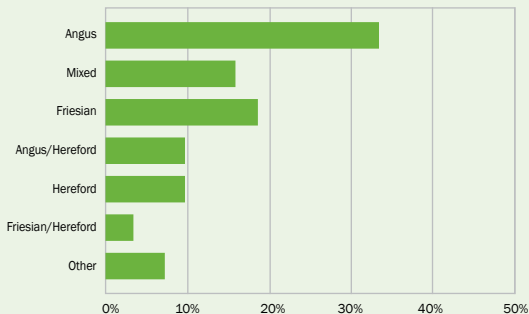
BEEF CATTLE



Beef cattle at 30 June 2021

Beef cattle numbers were 4.0 million at 30 June 2021 of which 1.1 million were beef breeding cows and heifers. 70% of total beef cattle were in the North Island. Few farmers devote themselves exclusively to beef production. In general, the raising and finishing of beef cattle is carried out in conjunction with sheep farming. In addition, beef is produced from cull dairy cows, bobby calves and raising young bulls to produce bull beef.

Beef cattle breeds 2019-20



Source: Beef + Lamb New Zealand Economic Service, Sheep & Beef Farm Survey

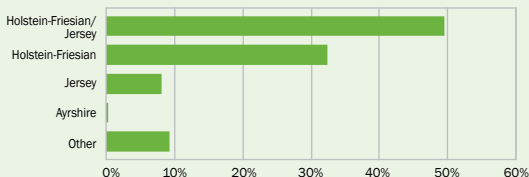
DAIRY CATTLE



Dairy cattle at 30 June 2021

Dairy cattle, including cows, replacement heifers and breeding bulls, totalled 6.2 million at 30 June 2021.

Dairy cow breeds 2020-21



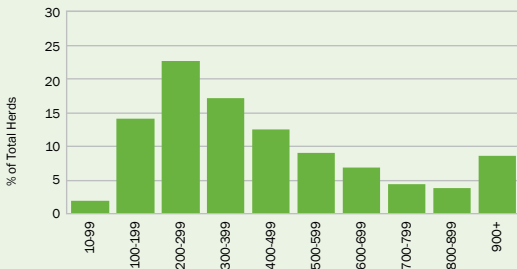
Source: Livestock Improvement Corporation Ltd, DairyNZ

59% of dairy cattle were in the North Island. The total herd of dairy cows and heifers in calf at 30 June 2021 was 4.8 million.

Herd size

Average herd size in	2010-11	386 cows
	2020-21	444 cows (+15%)

Dairy herd size distribution 2020-21



Source: Livestock Improvement Corporation Ltd

DEER



Farmed deer at 30 June 2021p

Breeding hinds	361,000	Other deer	154,000
Weaners	299,000	Total deer	814,000

For the year ended September 2021, total deer industry exports were \$279 million FOB. Venison exports were worth \$155 million FOB, velvet export earnings totalled \$78.7 million FOB while co-products and other totalled \$37.8 million FOB. Deer hides and leather receipts were \$6.7 million FOB.

Venison exports totalled 14,567 tonnes at an average of \$11,692 per tonne. 24% went to the USA, 17% to Germany and 26% went to Benelux. In 2020-21, China remained the largest export destination for New Zealand velvet accounting for 75% of export receipts, although Korea remains the largest market for the consumption of New Zealand velvet.

Source: Deer Industry New Zealand

GOATS



A total of 93,606 farmed goats were recorded in 2019 by Statistics New Zealand. For the year ended September 2021, 123,200 export graded goats were processed to produce 1,400 tonnes at an average carcase weight of 11.7 kg.

Goat exports totalled \$18.6 million FOB (excludes goat dairy products). This comprised \$18.0 million FOB of goat meat, \$0.6 million FOB of goat fibre and \$0.02 million FOB of skins.

Source: Statistics New Zealand

PIGS



Pig production in the year ended September 2021 was 632,153 pigs, a decrease of 0.8% compared to the year ended September 2020 (637,085 pigs).

Of all pigs processed, 67% were in the South Island and 33% were in the North Island.

Total New Zealand production of pigmeat was 44,926 tonnes, mostly consumed in the local market. Total supply of pig meat in 2020-21 was 122,346 tonnes (CWE) of which 77,607 tonnes (CWE) were imported.

Source: New Zealand Pork

MEAT



The total number of livestock processed for the year ended 30 September 2021 at export plants and abattoirs was:

18.5 million lambs	2.9 million cattle	0.6 million pigs
3.9 million sheep	1.9 million calves	0.3 million deer
		0.2 million goats

Total meat production on a carcase weight equivalent basis for the same period was:

	000 TONNES	% AVAILABLE FOR EXPORT ¹
Lamb	353.0	99%
Mutton	101.0	99%
Beef & Veal	759.0	98%
Pig meat	44.9	NA
Goat meat	2.0	70%
Venison	18.3	95%
Total	1,278.3	95%

1 Some was consumed in New Zealand.

Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand, Deer Industry New Zealand and New Zealand Pork

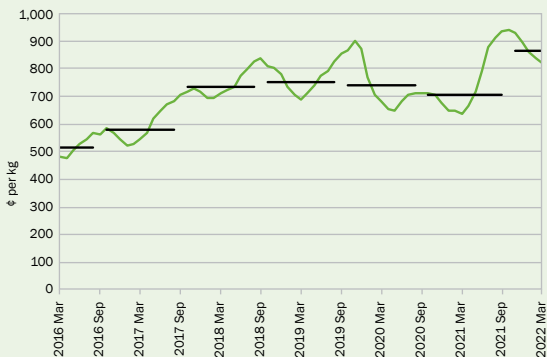
Farm-gate all classes weighted price \$ per head

Year ended 30 September	LAMB ¹	MUTTON ¹	BEEF
2011	118	92	971
2012	114	95	1,016
2013	85	61	933
2014	100	76	909
2015	94	67	1,144
2016	93	57	1,181
2017	106	74	1,252
2018	134	108	1,244
2019	142	123	1,223
2020	139	124	1,222
2021	133	127	1,206

1 Per head returns including skin and wool pull payments net of processing charges and levies.

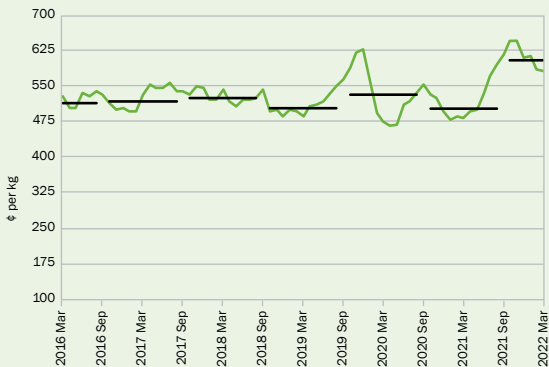
Source: Beef + Lamb New Zealand Economic Service

All classes lamb month and annual average



Source: Beef + Lamb New Zealand Economic Service

M class bull month and annual average



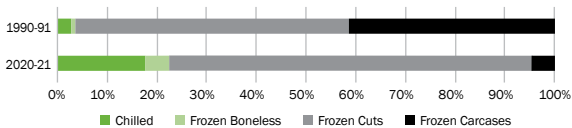
Source: Beef + Lamb New Zealand Economic Service

Average export carcase weights kg per head

Year ended 30 September	2020	2021	% change
LAMB			
North Island	19.05	19.40	+1.8%
South Island	19.01	18.84	-0.9%
NEW ZEALAND	19.03	19.12	+0.5%
MUTTON			
North Island	25.61	25.97	+1.4%
South Island	26.17	26.42	+1.0%
NEW ZEALAND	25.89	26.20	+1.2%
STEER AND HEIFER			
North Island	276.65	277.61	+0.3%
South Island	290.46	286.95	-1.2%
NEW ZEALAND	280.94	280.46	-0.2%
COW			
North Island	200.43	200.21	-0.1%
South Island	205.81	205.83	+0.0%
NEW ZEALAND	202.41	202.39	-0.0%
BULL			
North Island	299.95	301.05	+0.4%
South Island	297.58	298.58	+0.3%
NEW ZEALAND	299.28	300.36	+0.4%

Source: Beef + Lamb New Zealand Economic Service, New Zealand Meat Board

Export Lamb Product Mix



Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand

Meat exports Year ended 30 September 2021

	TOTAL TONNES SW	\$ 000 FOB	\$ PER TONNE SW
Carcases	14,101	132,830	9,420
Cuts	249,786	2,505,760	10,032
Boneless	42,863	576,648	13,453
LAMB	306,751	3,215,237	10,482
Carcases	37,798	288,493	7,633
Cuts	51,361	386,252	7,520
Boneless	5,575	58,452	10,484
MUTTON	94,734	733,198	7,740
Carcases	372	2,036	5,476
Cuts	64,567	316,063	4,895
Boneless	411,898	3,420,690	8,305
BEEF	476,836	3,738,789	7,841
Carcases	1,140	4,216	3,697
Cuts	11,271	43,978	3,902
Boneless	12,470	80,464	6,452
BOBBY	24,882	128,657	5,171
GOAT	1,515	18,033	11,900
OFFALS	64,769	330,548	5,103
TOTAL	969,487	8,164,462	8,421

Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand

Meat exports by region Year ended 30 September 2021

% of total tonnes SW

	LAMB	MUTTON	BEEF & VEAL	OTHER ¹
Africa	0%	0%	0%	7%
EU27 + GB	23%	3%	1%	11%
Middle East	3%	0%	2%	11%
North America	12%	4%	36%	12%
North Asia	58%	90%	54%	37%
Pacific	1%	0%	3%	3%
South Asia	1%	3%	4%	17%
Other	1%	0%	1%	1%
Total	100%	100%	100%	100%

1 Other meat and offal, variety meats, goat meat.

Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand

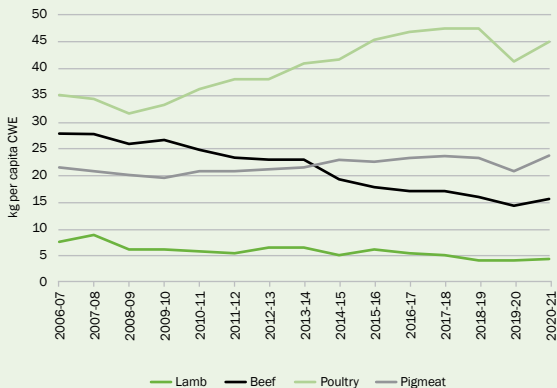
Inflation-adjusted meat export values and farm-gate prices (2020-21 terms) - year ending September

	LAMB			BEEF		
	1990-91	2020-21	CHANGE	1990-91	2020-21	CHANGE
Export value (\$b FOB)	2.46	3.35	+36%	2.80	4.40	+57%
Farm-gate price (\$/hd)	41	133	+224%	1,002	1,206	+20%
Farm-gate price (c/kg)	287	697	+143%	406	472	+16%
Export vol - chilled ¹	3%	17%	+14 pts	4%	8%	+4 pts
Export vol - carcass ¹	47%	5%	-42 pts	0%	0%	0 pts

1 shipped weight

Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand

New Zealand meat consumption



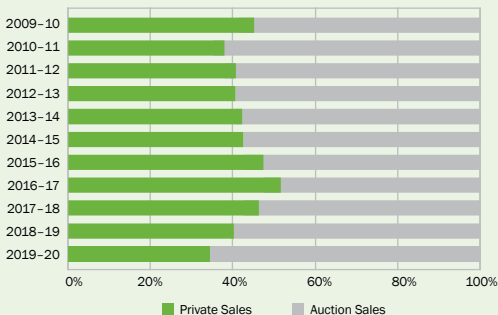
Source: Beef + Lamb New Zealand Economic Service, Poultry Industry Association of New Zealand, New Zealand Pork



In 2020-21, New Zealand was the third largest producer of wool in the world and produced 9.4% of world production.

The main shear generally takes place from November to January and sheep are machine-shorn on approximately 32,000 stands. Merino sheep are sometimes blade-shorn in cooler regions.

Farm-gate wool sales



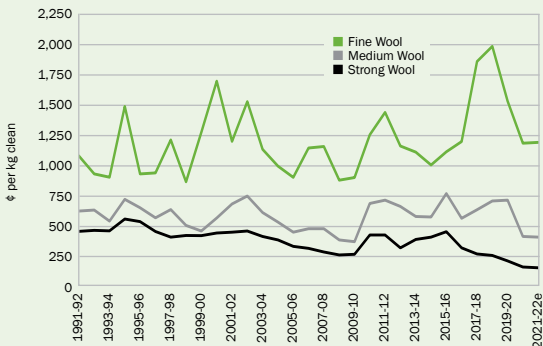
Source: Beef + Lamb New Zealand Economic Service, Sheep & Beef Farm Survey

Sheep numbers, wool production and auction price

YEAR	1 JULY SHEEP (000 head)	PRODUCTION (000t greasy)	AVERAGE PRICE (NZ c/kg greasy)
1980-81	68,772	380.7	247.5
1990-91	57,852	305.3	316.4
2000-01	42,260	236.7	392.2
2011-12	31,132	168.3	481.7
2012-13	31,263	167.1	367.9
2013-14	30,787	158.4	421.0
2014-15	29,803	153.8	443.8
2015-16	29,121	151.5	490.4
2016-17	27,584	143.2	371.8
2017-18	27,527	141.4	369.5
2018-19	27,296	144.7	381.3
2019-20	26,822	126.2	331.7
2020-21	26,029	130.2	253.6

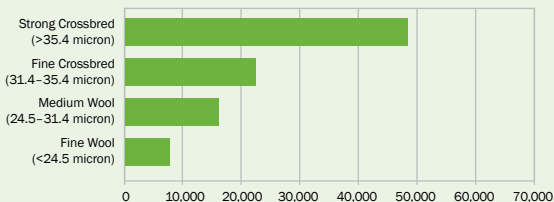
Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand

Real annual wool auction price (Inflation Adjusted, 2004-05 terms)



Source: Beef + Lamb New Zealand Economic Service, New Zealand Wool Services International Ltd

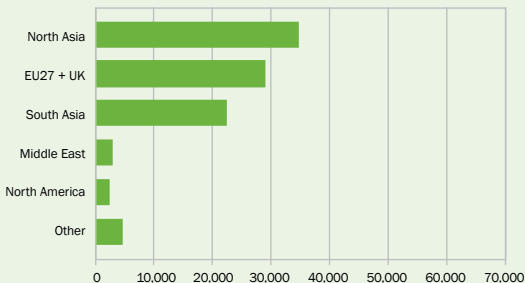
Wool exports Year ended June 2021 (tonnes clean)



Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand

Wool fibre export earnings for the year ended 30 June 2021 were \$395.7 million FOB. Wool carpet and rug export receipts were \$73.2 million FOB, with intermediate products (tops, yarns and sliver) and other final woollen products contributing a further \$30.7 million FOB. All wool products represented 0.9% (\$499.7 million FOB) of the total value of New Zealand merchandise exports.

Wool exports Year ended June 2021 (tonnes clean)



Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand



Dairy companies

Three New Zealand dairy companies that export are co-operatives: Fonterra, Dairy Goat Co-operative and Tatua. In addition, there are eight other dairy companies exporting dairy products: Westland, Goodman Fielder, Open Country, Synlait, Miraka, Yashili, Danone and Oceania Dairy. The largest of these companies is Fonterra, which is owned by over 10,000 dairy farmers, and processes around 15 billion litres of milk.

Dairy production 2020-21

In 2020-21 (year-ending June), production per cow was 397 kg milksolids or 4,426 litres of milk (comprising 222 kg milk fat and 175 kg protein content).

Dairy meat 2020-21

In the year ended 30 September 2021, 1.89 million bobby calves and 1.03 million cull cows were processed. In spring 2020, an estimated 0.70 million calves were retained for dairy beef production.

Exports of dairy produce Year ended September 2021

	000 TONNES	% ¹
Milk powder	2,005	46%
Whole milk	1,636	
Skim milk	337	
Butter	412	37%
Cheese	364	17%
Casein	93	0%
Whey	92	0%

1 Percentage of Milksolids equivalents

Source: Statistics New Zealand



Arable farming in New Zealand is located mainly on the plains and easier downland country in the South Island. The greater portion of the area sown is in Canterbury.

Cash crops

In the year ended June 2021, wheat was harvested from 43,500 hectares, barley from 44,200 hectares, maize from 17,500 hectares and oats from 4,600 hectares. Associated yields for wheat, barley, maize and oats were 9.7, 7.4, 12.0 and 6.3 tonnes per hectare respectively.

Grain and seed crop production

Year ended 30 June 2021

	NORTH ISLAND	SOUTH ISLAND	NEW ZEALAND
WHEAT			
Harvested (tonnes)	17,800	405,000	422,800
Production area (ha)	2,000	41,500	43,500
Yield (tonnes/ha)	8.9	9.8	9.7
BARLEY			
Harvested (tonnes)	54,900	270,100	325,100
Production area (ha)	8,300	35,900	44,200
Yield (tonnes/ha)	6.6	7.5	7.4
MAIZE			
Harvested (tonnes)	205,300	4,000	209,300
Production area (ha)	17,100	400	17,500
Yield (tonnes/ha)	12.0	10.0	12.0

Totals may not add due to rounding.

Source: Statistics New Zealand, 2021 Agricultural Production Survey

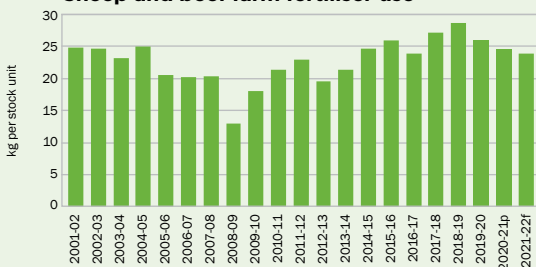


Fertiliser sales

Fertiliser provides nutrients to plants that are not readily available in the soil, helping farmers to foster plant growth and increase yields. Careful and efficient nutrient use is the cornerstone of New Zealand agriculture. It is estimated that without fertiliser use, New Zealand's soils would be able to support less than half, and possibly as low as 25%, of the animals grazed or crops grown.

Source: Fertiliser Association of New Zealand

Sheep and beef farm fertiliser use



Source: B+LNZ Economic Service, Sheep & Beef Farm Survey, All Classes Sheep and Beef Farm

Fertiliser usage varies considerably between regions due to differences in soil type, climate and type of farming.

Sheep and beef farm fertiliser use 2019-20

	NUTRIENT USE - KG PER HA ¹			TOTAL FERTILISER	
	N	P	K	KG PER HA ^{1,2}	KG PER SU ²
Northland/Waikato/BOP	23.4	21.9	13.2	277.4	29.8
East Coast	16.5	13.8	1.7	162.1	18.4
Taranaki/Manawatu	11.0	15.7	3.4	193.5	22.4
NORTH ISLAND	17.4	17.0	5.8	207.4	23.2
Marlborough/Canterbury	21.6	7.5	4.3	142.8	32.7
Otago/Southland	11.9	9.3	5.1	136.3	26.1
SOUTH ISLAND	16.9	8.0	4.5	136.2	29.6
NEW ZEALAND	17.0	11.4	5.0	163.2	26.1

1 Grazing area, 2 Total applied fertiliser includes other nutrients and inactive components to improve application and utilisation.

Source: B+LNZ Economic Service, Sheep & Beef Farm Survey, All Classes Sheep and Beef Farm

REVENUE & EXPENDITURE



Sheep and beef farm revenue, expenditure and profit

\$ per Farm¹

SUMMARY		2010-11	2019-20	2020-21p
1	REVENUE			
2	Wool	52,088	31,673	24,600
3	Sheep	216,788	320,255	291,500
4	Cattle	90,544	170,746	163,700
5	Dairy Grazing	15,943	34,662	33,100
6	Deer + Velvet	4,112	6,203	5,000
7	Goat + Fibre	25	72	0
8	Cash Crop	41,840	64,307	61,400
9	Other	23,251	23,617	22,800
10	TOTAL GROSS REVENUE	444,591	651,535	602,100
11	EXPENDITURE			
12	Fert, Lime & Seeds	58,124	83,544	83,300
13	Repairs & Maintenance	25,591	42,540	38,100
14	Other Working Expenses	138,250	212,939	209,000
15	TOTAL WORKING EXPENSES	221,965	339,023	330,400
16	Interest & Rent	60,833	76,597	74,191
17	Other Standing Charges	22,304	32,209	35,900
18	Depreciation	27,249	39,260	38,400
19	TOTAL EXPENDITURE	332,351	487,089	478,886
20	FARM PROFIT BEFORE TAX²	112,240	164,446	123,214

1 The Weighted Average All Classes Sheep and Beef Farm at 1 July 2020 carried 2,860 sheep, 391 beef cattle and 31 deer totalling 4,487 Stock Units.

2 Farm Profit Before Tax is required to meet personal drawings, taxation payments, debt repayments and the purchase of capital items.

Source: Beef + Lamb New Zealand Economic Service, Sheep & Beef Farm Survey, All Classes Sheep and Beef Farm

Revenue sources

Revenue	2010-11	2019-20	2020-21p
Wool	12%	5%	4%
Sheep	49%	49%	48%
Cattle	20%	26%	27%
Dairy Grazing	4%	5%	5%
Deer + Velvet	1%	1%	1%
Cash Crop	9%	10%	10%
Other	5%	4%	4%

Source: Beef + Lamb New Zealand Economic Service, Sheep & Beef Farm Survey, All Classes Sheep and Beef Farm

AGRICULTURAL PRODUCTION & EXPORTS

Value and volume of agricultural production and exports

YEAR	TOTAL AGRICULTURAL EXPORTS (\$m FOB)	TOTAL PASTORAL EXPORTS (\$m FOB)	WOOL PRODUCTION (000 TONNES CLEAN)	MILK SOLIDS PROCESSED (000 TONNES)	MEAT PRODUCTION (000 TONNES BONE-IN)
NOTE	1	1	1	2	3,4
2010-11	24,405	19,294	125	1,513	1,088
2011-12	25,055	19,691	125	1,685	1,051
2012-13	24,972	19,439	124	1,658	1,117
2013-14	30,190	24,444	117	1,825	1,119
2014-15	28,032	21,740	114	1,890	1,183
2015-16	28,183	20,720	112	1,862	1,134
2016-17	28,683	21,149	106	1,851	1,089
2017-18	31,731	23,870	105	1,840	1,158
2018-19	34,120	25,403	107	1,884	1,148
2019-20	36,921	27,669	94	1,896	1,165
2020-21	35,847	26,775	96	1,947	1,213

1 Year Ended June. 2 Year Ended May. 3 Year Ended September. 4 Inspected meat production at export plants and abattoirs – lamb, mutton, beef and veal.

Source: Beef + Lamb New Zealand Economic Service, Ministry for Primary Industries, Statistics New Zealand, Livestock Improvement Corporation Ltd

Value of New Zealand exports

Year ended 30 June (\$ million FOB)

	2018	2019	2020	2021	2022	% Change ¹
PASTORAL PRODUCTS						
WOOL						
Raw Wool	543	549	432	396	438	+11%
MEAT						
Lamb	3,018	3,227	3,331	3,167	3,612	+14%
Mutton	575	576	643	698	704	+1%
Beef & Veal	2,943	3,324	3,811	3,587	4,600	+28%
Venison	196	186	152	150	171	+14%
Edible Offal	251	289	319	331	400	+21%
Other (poultry, pork)	292	322	273	297	302	+2%
TOTAL MEAT	7,276	7,924	8,529	8,230	9,790	+19%
DAIRY						
Milk & Powders	8,420	9,507	11,143	10,990	12,590	+15%
Butter	3,812	3,612	3,365	2,670	3,550	+33%
Cheese	1,905	1,965	2,074	2,064	2,210	+7%
Casein	834	811	1,020	1,058	1,496	+41%
TOTAL DAIRY	14,971	15,896	17,602	16,783	19,846	+18%
OTHER ANIMAL PRODUCTS						
Hides & Skins	163	154	112	94	154	+64%
Deer Velvet	55	45	48	65	78	+20%
Tallow	110	99	115	160	263	+64%
Animal Oils & Fats	38	16	27	22	21	-5%
Crude Animal Materials	474	482	514	512	572	+12%
TOTAL OTHER	840	796	817	853	1,087	+27%
LIVESTOCK	241	239	290	513	474	-8%
TOTAL PASTORAL	23,870	25,403	27,669	26,775	31,634	+18%
HORTICULTURE & ARABLE						
Fresh Kiwifruit	1,861	2,302	2,534	2,705	2,911	+8%
Fresh Apples	733	829	876	825	862	+4%
Other Fruit & Nuts	287	285	279	360	267	-26%
Vegetables	410	486	513	471	440	-7%
Seeds, Plants, Plant Material	312	317	405	336	325	-3%
Cereals	23	21	10	9	6	-34%
TOTAL HORTICULTURE & ARABLE	3,625	4,240	4,616	4,705	4,810	+2%

1 2021 to 2022

Value of New Zealand exports (continued)

	2018	2019	2020	2021	2022	% Change ¹
PROCESSED AGRICULTURE						
Tops, Yarns & Sliver	20	20	18	22	26	+19%
Carpets & Rugs	104	90	69	73	62	-16%
Other Final Woollen Products	19	17	13	11	13	+15%
Leather/Dressed Skins	233	200	129	107	142	+32%
Meat Meal & Animal Feeds	383	422	477	508	574	+13%
Processed Fruit & Veg	379	404	413	373	377	+1%
Wine	1,701	1,815	1,920	1,870	1,950	+4%
Cereal Products	28	31	28	25	26	+3%
TOTAL PROCESSED	2,867	2,999	3,067	2,991	3,171	+6%
OTHER AGRICULTURAL EXPORTS	1,368	1,477	1,569	1,376	1,688	+23%
TOTAL AGRICULTURE	31,731	34,120	36,921	35,847	41,303	+15%
FORESTRY						
Sawn Timber & Logs	4,328	4,840	3,782	4,857	4,712	-3%
Other Wood & Wood Products	611	625	536	486	513	+6%
Pulp & Paper Products	1,359	1,345	1,161	1,145	1,334	+16%
TOTAL FORESTRY	6,298	6,809	5,480	6,488	6,559	+1%
FISH	1,604	1,790	1,675	1,578	1,748	+11%
TOTAL PRIMARY EXPORTS	39,632	42,719	44,076	43,913	49,610	+13%
OTHER MERCHANDISE EXPORTS						
Aluminium	1,189	1,247	1,103	1,119	1,679	+50%
Mineral Fuels	1,190	1,127	926	444	1,071	+141%
Machinery & Equipment	2,270	2,358	2,143	2,253	2,642	+17%
Other Exports	9,298	9,899	10,055	10,231	10,480	+2%
TOTAL MERCHANDISE EXPORTS	53,580	57,350	58,302	57,960	65,481	+13%
PASTORAL % OF EXPORTS	44.6%	44.3%	47.5%	46.2%	48.3%	
AGRICULTURE % OF EXPORTS	59.2%	59.5%	63.3%	61.8%	63.1%	
PRIMARY % OF EXPORTS	74.0%	74.5%	75.6%	75.8%	75.8%	

Source: Beef + Lamb New Zealand Economic Service, Statistics New Zealand





VISION

Sustainable and profitable farmers, thriving rural communities, valued by New Zealanders

PRIORITIES



Supporting farming excellence



Championing the sector



Increasing market returns



Beef + Lamb New Zealand

Economic Service

PO Box 121, Wellington 6140

E-mail: econ@beeflambnz.com

Phone: +64 (4) 473 9150

NZ Freephone: 0800 BEEFLAMB (0800 233 352)

Website: www.beeflambnz.com