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Red Meat Report

Issue
03

Introduction from Sam McIvor and Sirma Karapeeva

The COVID-19 pandemic has continued to challenge the red meat sector, but once again farmers, processors and exporters have demonstrated their resilience and commitment to keeping our people safe, producing the world's best beef and lamb and fueling the economic engine of the country.

While farmers are enjoying strong livestock prices as lockdown restrictions ease around the world, the difficulty has been getting products to market.

The disruption to global shipping and logistics due to COVID-19 remains a significant problem and exporters are working hard to manage the situation as best as they can. However, it is unlikely this issue will be resolved in the near term.

Our sector is also taking unprecedented precautions against the spread of the Delta variant. The processing industry has established revised safety protocols to reflect the greater transmissibility of Delta and companies have been proactive in working with local District Health Boards and medical centres to facilitate and support vaccination uptake.

Environment remains top of mind for sector leaders as we approach the first set of deadlines under the He Waka Eke Noa Primary Sector Climate Action Partnership.

Good progress has been made to support farmers to "know their number". The challenge now is to scope out and develop an appropriate emissions pricing mechanism, which encourages on-farm practice change to reduce emissions while also ensuring the on-going viability of the sector.

It is critical that we get this right. The wrong price incentives could not only see a reduction in stock numbers but the conversion of productive land into forestry.

Following the release of the latest IPCC report, we heightened our calls for the Government to start to use the improved GWP* metric to measure methane.

One of our key messages to the Government is that farmers are struggling with the speed, scale and practicality of the environmental reforms.

Trade continues to be key in the industry's strategy to earn export revenue for New Zealand. We have seen some good progress on the UK Free Trade Agreement front and welcome the applications by the UK, China and Chinese Taipei to join the CPTPP.

Market diversification relies on having access to a wide variety of markets with clear and robust trade rules. The industry continues to perform well with exports hitting record highs as companies use their commercial relationships across the world to extract maximum value for our red meat and co-product exports.

However, we remain constrained by the chronic labour shortage in the industry, which has been exacerbated by border closures. To help address the issue, there are several initiatives such as the processing sector's Meat your Career website.

The Red Meat Sector Conference in July highlighted that despite these challenges, the sector is in a good place and is well placed to navigate the future. It is exciting to see young and diverse future leaders actively participating in the sector, which bodes well for the future.



Sam
McIvor
CEO,
B+LNZ



Sirma
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CEO,
MIA



SECTOR-WIDE ACTIVITIES

The sector has been working on a range of initiatives aimed at positioning the industry and responding to challenges.

The sector's exports have continued to perform strongly despite the challenges that COVID-19 has presented and you can read more about the sector's export performance under the market update section in the report.

However, despite these successes, there have been a range of issues related to COVID-19 that the sector has been tackling.

- **Immigration and workforce shortages exacerbated by COVID-19:** The meat industry, like others in the primary sector, is dealing with ongoing labour shortages and these have been exacerbated due to COVID-19. Due to the border closure, the industry has not been able to bring in any new halal butchers and up until recently was also facing the potentially disastrous situation of losing up to 100 of our 250-strong halal butcher workforce when their visas expired.

Visa extensions announced by the Government are welcome and will help ease some of the pressure. However, the industry is still seeking a more permanent solution that would facilitate the entry of migrant halal butchers such as a special visa category for halal butchers.

- **Vaccination:** in New Zealand, the roll out of vaccination planning and guidance for workplace-based vaccination has been slow. MIA had advocated strongly for a coordinated workplace vaccination programme to support those plants with capacity to vaccinate their workforce onsite. Unfortunately, this hasn't materialised in the Ministry of Health's planning and New Zealand meat processors have instead been working with their District Health Board or arrangements with their local medical centres to support vaccinating their workforce. Vaccinating meat processing workers remains a high priority issue for the industry as it will provide another layer of protection to mitigate the risk. Efforts are now focused on encouraging the swift uptake of vaccines in workplaces. We encourage all participants in the sector to complete their double vaccination as soon as possible - this will help to reduce the risks of value chain disruption and losses in the sector.
- **Shipping and logistics:** COVID-19 has continued to cause significant disruptions to the global shipping network. While New Zealand has little ability to influence the international challenges, there are areas where the Government can work with industries in the supply chain to address the domestic supply chain blockages. A return to full capacity and a clearing of backlogs relating to Auckland would be enormously helpful but the problem is much broader than the Upper North Island. It will require an all-of-New Zealand, all-of-sector and all-of-Government approach. The MIA continues to highlight the challenges faced by our sector, including meeting with the Minister of Transport Michael Wood and the CEOs of Port of Tauranga and Port of Napier.



RED MEAT SECTOR CONFERENCE

MIA and B+LNZ Ltd jointly hosted the Red Meat Sector Conference 2021 on Monday 26 July in Rotorua. With the theme being “Building Sustainable Value Together”, the programme was designed to challenge our thinking, highlight the opportunities for our sector and also discuss some of the challenges coming our way.

This year, we built in new innovations to the conference programme, including a Meat Business Women networking lunch and a MIA Scholars workshop.

Meat Business Women, together with MIA and B+LNZ Ltd, hosted a networking lunch as part of the programme. Over 50 women working within the industry came together to discuss how to support more women to enter, and succeed, in the sector.



The Honorable Meka Whaitiri, Associate Minister of Agriculture gave the keynote address. MIA CEO Sirma Karapeeva then hosted a discussion with the Minister and three panel speakers: Kristin Akehurst, CFO, AFFCO New Zealand Limited; Sarah Brown, Board Director, Alliance Group Limited and Nicola Johnston, Group Marketing Manager, Silver Fern Farms Ltd.

The MIA Scholars workshop saw 18 of the recipients of the annual MIA scholarships come together to share their experiences and learn from industry leaders.

This year, a joint MIA Council and B+LNZ Ltd Board meeting was held to discuss headline issues for the sector.

On the day of the conference, a packed programme kicked off with Geoff Ross, founder of 42 Below and owner of Lake Hawea Station, who encouraged the audience to see our sector as part of the solution, framing environmental challenges as an opportunity that New Zealand farmers already have a head-start on.

The sector also heard from Stuff journalist Andrea Vance about her take on New Zealand politics. In session two, titled “Silver linings, looking for opportunity”, the audience heard from three speakers including Philip Houlding, Director International Policy at the Ministry for Primary Industries (MPI), who gave us his insights and perspectives on MPI’s work on global sustainability and food systems development. Anne Mottet, from the Food and Agriculture Organization (FAO) presented on the challenges of measuring sustainability in livestock production, and Mike Lee, co-founder and co-CEO of Alpha Food Labs, spoke about regenerative farming.

The final session included two panels. The first panel, facilitated by Charles Finny, heard insights and advice from Julia Jones (NZX), Andrew Watene (KPMG) and Tim Green (NZTE) about building export resilience into the sector’s approach to trade, supply chains and international brand. The panel encouraged companies to scenario plan for a range of “what ifs”, take cyber security threats seriously and protect “critical business”, and think creatively about how to maintain and build relationships through COVID-19 restrictions.

The day concluded with a second panel facilitated by Rowena Duncum from *The Country* radio show. The panel titled “Meat the Future” included young and emerging leaders from the farm side and the processor side of the sector. Panelists Charles Taituha, Kurt Portas, Harriet Watson and Jack Monckton provided the audience with their perspectives on why they were attracted to the sector, how to attract and retain young people as well as the opportunities and challenges.

MAKING MEAT BETTER MICROSITE

Earlier this year B+LNZ and MIA jointly launched the consumer-facing 'Making Meat Better' website containing facts about New Zealand's farming methods to help inform conversations about the production and consumption of beef and lamb.

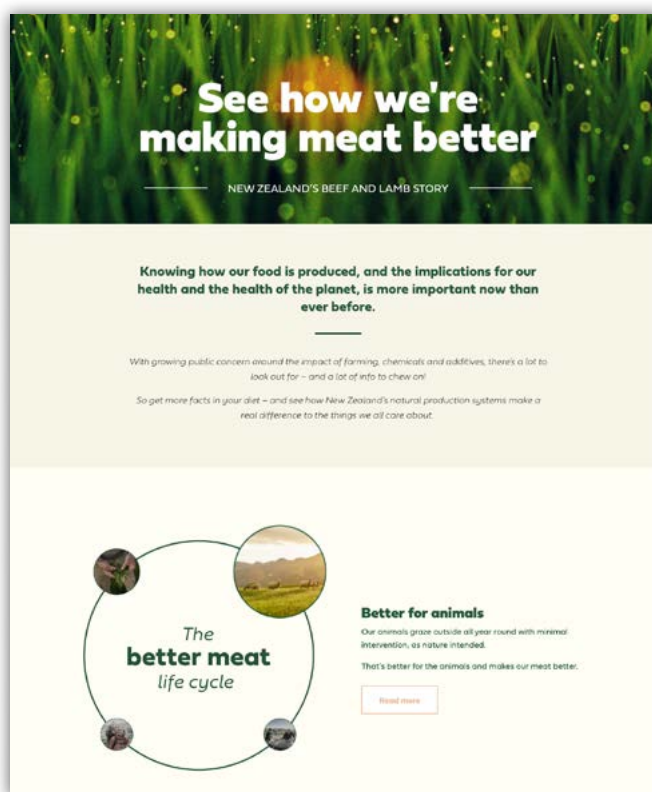
We've had great feedback from meat processing and marketing companies about how the site can help their marketing efforts overseas, we've attracted some influential followers to our social media channels and awareness is building.

In its first six months after launch, the website has been visited over 26,088 times by 23,000 different users. The social media channels have reached over 4 million people, generating more than 77,000 likes, comments and shares. The social media posts are intended to spark engagement and create conversations, which has been really effective.

This has exceeded our initial targets and we're excited to continue to develop content that is engaging and appealing to users.

'Making Meat Better' is also supporting the marketing of New Zealand beef and lamb globally, underpinning the promises made by the Taste Pure Nature brand.

Check out the website here: www.makingmeatbetter.co.nz



INDEPENDENT REVIEW INTO MYCOPLASMA BOVIS PROGRAMME

The findings of an independent review into the *M. bovis* eradication programme were released earlier this month.

The review was commissioned by the *M. bovis* Governance Group, which includes Beef + Lamb New Zealand, DairyNZ and MPI and you can read the report of the review panel here.

It captures lessons learned during the *M. bovis* response and subsequent eradication programme and makes recommendations to help the biosecurity response system be better prepared for any future livestock disease incursions. The review finds that after a difficult start, continuous improvements have been made and the Programme is on track to achieve the world's first eradication of the disease.

The review panel acknowledged the impact that the eradication has had on farmers and the farming community as the Programme scaled-up quickly to stop the spread of the disease.

It made a number of recommendations which we, MPI and DairyNZ have all accepted and are implementing. The four key recommendations are:

- MPI and industry must deliver on the review recommendations and provide for ongoing governance of livestock disease preparedness
- Develop and resource the livestock disease preparedness function within MPI (Biosecurity New Zealand), particularly for large-scale and complex animal disease incursions
- Build a national contingency plan for animal disease responses, supported by detailed operational procedures and materials
- Develop and resource a data strategy across the livestock biosecurity system.

Some of the improvements that have been made or are underway include:

- The appointment of a new specialist welfare advisor within Biosecurity New Zealand to ensure a greater focus on people's welfare needs in future incursion responses
- A new Chief Veterinary Officer for MPI to connect the Ministry's vets who practice across a wide range of activities; and build collaboration with the country's private vets to enhance disease readiness
- Investment in a new data strategy to ensure the information needs of biosecurity responses can be adequately met in future
- An extensive programme of readiness for an FMD incursion is underway and much of this work is scalable to incursions of less severe impact
- Threat-specific plans are in place for other critical exotic diseases
- The strengthening of importing requirements for cattle semen
- Completion of the new National Biocontainment Laboratory to improve disease diagnostic capability and capacity.

There's no denying the disruption and stress experienced by farmers affected by the eradication programme.

We owe it to those farmers to ensure the eradication programme and future biosecurity responses are the best they can be.

Implementing the recommendations of this review will go a long way to strengthening our biosecurity system, which will prove vital in the face of any future incursions.

REFERENDUM 2021

This year farmers had their say in the 2021 sheepmeat and beef levy referendum and those farmers that voted overwhelmingly supported the continuation of the sheepmeat and beef levies.

Results

- **Sheepmeat:** 89.8% yes (1 for 1 voting) and 92.1% yes (weighted stock unit basis)
- **Beef:** 88.1% yes (1 for 1 voting) and 89.5% yes (weighted stock unit basis)
- **Sheepmeat levy increase:** 68.4% yes (1 for 1 voting) and 70.5% yes (weighted stock unit basis)
- **Participation:** 34.7% participation which is 5,265 voters. It equates to 5,295 participants and by livestock represents: 54% of National Sheep Numbers, 43% of National Beef Cattle Numbers, and 16% of National Dairy Cattle Numbers.

The referendum was a good opportunity for farmers to learn about all the work B+LNZ does on their behalf to ensure this country's red meat industry remains world-leading.

As part of the referendum roadshow, B+LNZ held 34 events across the country attended by more than 1000 farmers including five hui with Māori farmers, trusts and trustees, attracting 60 attendees.

Now more than ever, farmers need a strong voice representing their interests domestically and internationally, positioning our product with consumers, and providing them with the support they need on-farm to run more sustainable and profitable businesses.

We're very pleased with the result, particularly given the amount of farmer concern out there about the wave of regulation coming at them.

A B+LNZ referendum happens every six years as required by the Commodity Levies Act.

Growing a stronger future together

B+LNZ is your organisation. We invest your levies to champion our sector, support farming excellence and increase market returns. Have your say on our future together.

LEVY PROPOSAL



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Beef+Lamb
New Zealand AWARDS

Awards Partner

Farmlands
co-operative



BEEF + LAMB NEW ZEALAND AWARDS

This year, B+LNZ launched the inaugural Beef + Lamb New Zealand Awards to celebrate the people, the science, technology and innovation that makes New Zealand's red meat sector world-leading.

After a review of the previous successful Sheep Industry Awards, the Beef + Lamb New Zealand Awards were developed after extensive consultation with our farmers and wider industry groups and now incorporate the whole red meat sector including sheep, beef and dairy beef.

We received an impressive number of entries, more than 120 across the eight award categories.

The award categories are Emerging Achiever Award, People Development Award, Significant Contribution Award, Rural Champion Award, Science and Research Award, Technology Award, Innovative Farming Award and Market Leader Award.

We look forward to celebrating the finalists and announcing the winners at the Awards Dinner early next year in Napier. Tickets to the Awards Dinner will go on sale soon.

Our Awards Partner is Farmlands, and each award category has a partner. They are: AgResearch, Rabobank New Zealand, Alliance Group New Zealand, FMG, Ballance Agri-Nutrients, Datamars Livestock NZ, Gallagher Animal Management and Silver Fern Farms.

For more details visit: www.beeflambnz.com/awards



NZFAP PLUS LAUNCHED

Sheep, beef and deer farmers now have the opportunity to prove their sustainability credentials with the launch of a new quality assurance standard in October.

New Zealand Farm Assurance Plus (NZFAP Plus), which builds on the existing New Zealand Farm Assurance Programme (NZFAP), includes a focus on people, farm, natural resources and biodiversity.

NZFAP Plus is the culmination of three years of work in response to changing expectations from customers, consumers and farmers wanting to prove their sustainability credentials. It is about demonstrating and communicating to New Zealand and an international audience that the New Zealand red meat and wool sectors are farming sustainably and ethically.

NZFAP Plus was initially developed by the Red Meat Profit Partnership (RMPP), a Primary Growth Partnership programme involving the Ministry for Primary Industries, Beef + Lamb New Zealand, six meat processors and two major banks.

Meat processing companies have worked collaboratively to build a programme that will ensure New Zealand farmers retain their domestic social licence to operate and market access globally by demonstrating environmental custodianship.

The programme has been piloted with 30 farmers and feedback has been positive.

The programme is aligned with Beef + Lamb New Zealand's Farm Plan to avoid duplication and provides tools and resources to support farmers in working towards meeting the standards.

To take part in the programme, farmers need to have completed NZFAP, the foundation programme.

They can then apply to become a member of NZFAP Plus and will carry out an initial self-assessment to determine what aspects of their business they need to work on. They then have up to three years to meet the required standards and be audited by an AssureQuality independent auditor.

The cost of the certification audit is covered by NZFAP member companies with whom farmers have a relationship.

NEW DIRECTORS

B+LNZ have appointed three new directors to its Board this year.

Bayden Barber – B+LNZ's Independent Director

Bayden Barber was appointed as an Independent Director in January. Bayden was selected for his deep understanding and relationship with Māori agribusinesses. He is a member of the New Zealand Institute of Directors, sits on the board of Te Taura Whiri o Te Reo Māori and is a Trustee on the Māori Education Trust, representing the New Zealand Māori Council. He is of Ngāti Kahungunu, Ngāpuhi and Ngāi Tahu descent.



Bayden farms Angus cattle on a 100-acre block in Waimārama, Hawke's Bay and is chairman of Waimārama Section 3 Block 2 Trust and is a Trustee of the Tiakitai Estate, which is leased to Horizon Farms.

Alex Guilleux – B+LNZ's Industry Director

Alex Guilleux was appointed as an Industry Nominated Director on B+LNZ's Board in July. Alex has special expertise in the area of data strategy, information management and digital transformation.

Alex has a wealth of experience in strategy, agribusiness, supply chains, and digital solutions and is already making a valuable contribution to our sheep and beef industry.

Alex's appointment to the Board was endorsed by the Meat Industry Association of New Zealand.



The appointment to the B+LNZ Board also sees Mr Guilleux appointed to the New Zealand Meat Board under the Meat Board Act 2004.

Kate Acland – Northern South Island Director

In March 2021, Kate Acland from Ashburton has been elected to represent the Northern South Island district, replacing sitting director Phil Smith from Culverden.

Acland has previously served as the Associate Director on B+LNZ's Board in 2018. Kate holds a Bachelor's degree in Viticulture and Oenology and a Master's Degree in Applied Science majoring in Farm Management Consultancy from Lincoln University.



Along with her husband David, Kate runs a highly diversified group of businesses employing 25 staff.

MEAT BUSINESS WOMEN PARTNERSHIP

B+LNZ and MIA are affiliate sponsors of New Zealand's Meat Business Women (MBW) which is a global professional networking movement for progressive women working across the meat industry.

MBW's aim is to connect women from all roles across the meat industry globally. They are recognised by the United Nations (UN) as a solution to one of the Global Sustainable Development Goals (SDGs).

MBW runs a global mentoring platform where members have the opportunity to be mentored/or mentor, another from across the globe.

The network run many events, both in-person and online.

Learn more about Meat Business Women by visiting <https://meatbusinesswomen.org>



GLOBAL TRADE

New Zealand's red meat exports continue to perform at near-record levels despite the impacts of COVID-19. The recent trade agreement with the UK is a major win for the sector and has many positive outcomes for farmers.

MARKET UPDATE

(Note: The figures for the overall exports are slightly different from the annual report as they include wool)

2020/21¹, was a near-record year for meat exports with \$9.5 billion of product going to 116 countries. This is a testament to the sector's strong relationships across our diverse markets, resilience, agility and innovation.

This historically high result was largely driven by the on-going protein shortage caused by African Swine Fever in China, which is impacting global meat prices.

In 2020/21, China imported over 10 million tonnes of meat, more than double the amount of meat that it imported two years ago when ASF was beginning to affect domestic pork production.

New Zealand, like nearly all other meat exporting countries, has continued to benefit from this demand. China remained the industry's largest market in 2020/21, taking exports worth \$3.8 billion, which was 40 percent of the industry's total exports for the year.

The other major destinations were also unchanged from last year: the United States (\$1.9 billion), United Kingdom (\$447 million) and Japan (\$406 million).

One notable increase in the top 10 markets was Australia, where exports increased by 20 percent to \$255 million. New Zealand exports a wide range of products to Australia, but the largest increase was in beef exports which more than doubled compared to last year. Australia is going through a period of significant herd rebuilding, which has reduced meat production and 2020/21 was the first year that exports to Australia were above \$200 million.

Sheepmeat

New Zealand exported 406,577 tonnes of sheepmeat in 2020/21. The value of these exports decreased slightly by three percent to \$3.9 billion compared to last year but this was still the second highest value for a June year.

The standout market for sheepmeat was China, with exports up 17 percent by volume to 244,705 tonnes and the value of these exports up 12 percent to \$1.9 billion.

China took 60 percent of New Zealand's total sheepmeat exports by volume in 2020/21, and 49 percent by value. While this was a very high percentage of exports going to just one country, it was still less than the 70 percent of sheepmeat exports that were being sent to the United Kingdom in the early 1960s.

¹Unless otherwise stated, all statistics are for the 12-month period ended 30 June 2021.

New Zealand also now has access to a much wider range of markets, and as demonstrated when COVID-19 first hit, the industry can quickly move product to markets when necessary.

The strong growth in exports to China meant that exports to most other major markets declined compared to last year, apart from North America. The United States, in particular, has been rolling out a COVID-19 vaccine programme and has seen good recovery in the food service sector, which is a major destination for New Zealand lamb.

The volume of sheepmeat exports to the United States increased by 36 percent to 27,498 tonnes, and the value of these exports increased by seven percent to \$372 million.

Beef

New Zealand's beef exports followed a similar pattern to sheepmeat exports in 2020/21, with an increase in the volume of exports but a decrease in the value.

In fact, the 480,618 tonnes exported during the year was another record annual volume, up four percent from last year. The value of beef exports for the year dropped by six percent to \$3.6 billion, but this was still the second highest value for a June year.

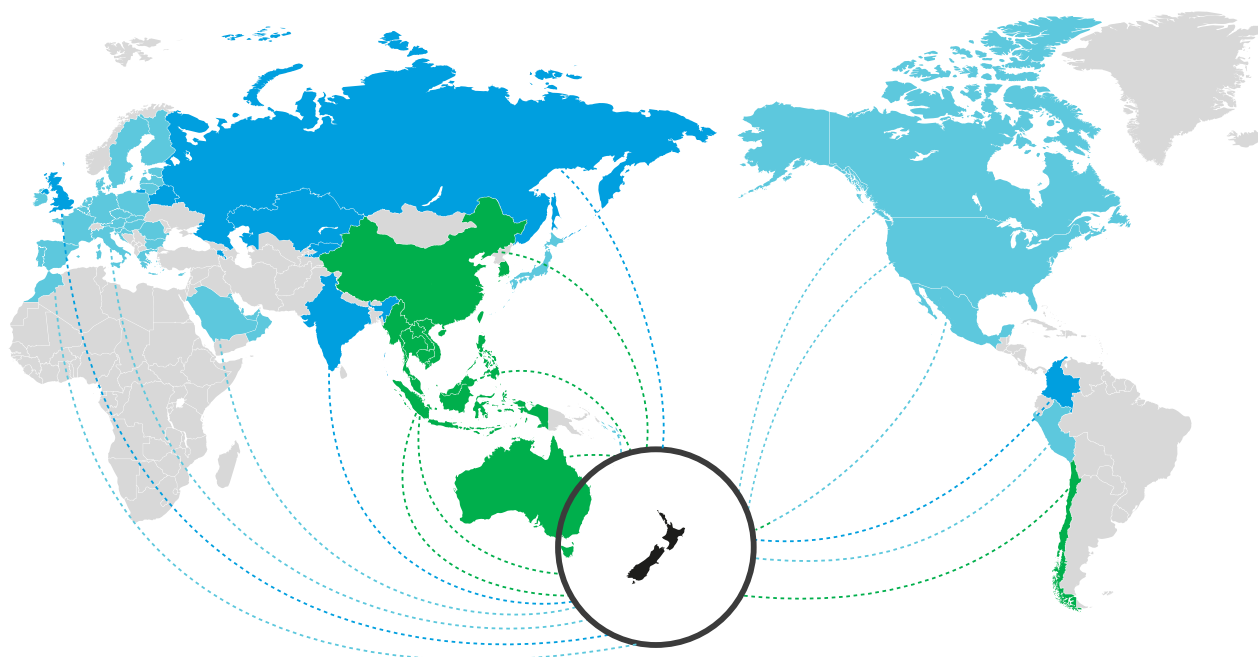
China was New Zealand's largest market for beef, taking 187,431 tonnes (39 percent of total exports) worth \$1.3 billion (36 percent). However, the volume and value of New Zealand's beef exports to China dropped compared to last year, four percent by volume and 17 percent by value.

There was still strong demand for New Zealand beef in China, but other major beef exporters such as Brazil and Argentina, have increased their access to China in recent years. In 2020/21, China imported more than 2.2 million tonnes of beef, and 40 percent of these exports (around 900,000 tonnes) came from Brazil, with a further 23 percent (more than 500,000 tonnes) from Argentina.

The United States has also significantly increased its beef exports to China over the last year. The United States-China Phase One trade deal came into effect in February 2020, and this has seen United States beef exports to China increase from around 13,000 tonnes in 2019/20 to nearly 110,000 tonnes in 2020/21.

The United States is an important destination for New Zealand's beef exports and was the second largest market in 2020/21 with exports of 163,600 tonnes worth \$1.3 billion, up three percent by volume and eight percent by value from the previous year.

More than 70 percent of beef exports went to these two countries.



BARRIERS TO INTERNATIONAL TRADE

An important part of the trade and advocacy team’s work at MIA and B+LNZ is to ensure that decision makers in the New Zealand Government are well informed about the sector, and understand and prioritise the sector’s interests, including the difficulties that the sector faces in key markets.

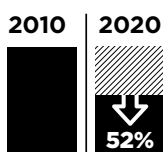
Every two years, MIA and B+LNZ Ltd jointly publish a Barriers to International Trade Report, which sets out the tariff and non-tariff barriers in the sector’s key markets. A copy of this report is available on the MIA and B+LNZ websites. The most recent report has highlighted that New Zealand’s network of FTAs has been effective in reducing the sector’s tariff burden from \$370 million in 2010 to \$176 million in 2020. New Zealand’s current network of FTAs covers approximately 58 percent of the sector’s trade.

The report, however, also highlights the growing impact of non-tariff barriers (NTBs) on our sector. While tariffs are generally easy to measure, NTBs are more difficult to identify but can have a significant detrimental impact on trade. In 2016, NZIER estimated that NTBs cost New Zealand beef exports in the Asia-Pacific \$1 billion in additional costs. MIA and B+LNZ are planning to commission an update to this report in order to identify the potential costs which would be reduced through FTAs and market access negotiations.



In 2020 the sector saved over \$596 million in duties due to FTAs.

In 2020 the sector still faced an estimated tariff burden of \$176 million.



In the period between 2010 and 2020, the total tariff burden on the sector reduced 52 percent, from \$370 million in 2010 to \$176 million in 2020.

58 percent of the sector’s exports by value were covered by FTAs in force.



NEW MARKETS AND NEW MARKET ACCESS

New Zealand generally has good access into a wide range of markets, and in 2020/21 the meat industry exported products to 108 different countries. As our International Barriers to Trade highlighted, 58 percent of the sector’s exports by value are covered by FTAs in force.

Market diversification has long been a strategic priority to our sector. However, disruption caused by COVID-19 has emphasised the importance of having access to as many markets as possible, so as well as the work to maintain access into current markets, the sector is always seeking opportunities to open up new markets.

Traditionally, the main mechanism for opening up markets has been through free trade agreements FTAs.

The Government’s pursuit of “high-quality and comprehensive” FTAs has delivered significant results for New Zealand as a small, largely liberalised economy. Increasingly, however, the Government may need to look for creative and novel ways of approaching trade relationships.

FTAs are not necessarily silver bullets that automatically open up trade. For example, trade between New Zealand and Malaysia is covered under three FTAs, but Malaysia remains a very difficult market for meat exporters to trade with.

India is a prime example of where a different approach may be required, as the Indian government is not in a position politically to negotiate a comprehensive or high-quality FTA. However, access remains important for the sector and consideration should be given to whether there are other commercially meaningful ways in which we could open market access.

MIA and B+LNZ, as members of the New Zealand International Business Forum, supported the commissioning of the report “Wanted! New FTA Partners” by Sense Partners. This report is a useful starting point for a conversation about new trade partners and creative solutions.



NEW ZEALAND-UNITED KINGDOM TRADE AGREEMENT BOOST FOR RED MEAT SECTOR

Last month, New Zealand and the UK signed an Agreement in Principle (AIP) trade agreement.

The deal, once signed and ratified, will result in New Zealand beef and sheepmeat exports initially entering the UK under a tariff rate quota (TRQ) regime. New Zealand will be permitted to gradually increase its export tonnages over the 10-year transition period (for sheepmeat up to 149,205-164,205 tonnes annually, for beef up to 12,000-60,000 tonnes annually), while the quota will eventually be completely phased out.

That means product within the TRQ amounts will enter tariff free. While there will be no TRQ regime after a decade, a volume safeguard provision will apply to the end of year 15, beyond which no safeguards will apply.

Co-products such as processed meats, petfood, and offals will have tariffs eliminated at entry into force, meaning further value can be added to the carcass, which will flow back through processors and into farmers' pockets.

Farmers, processors, exporters and the New Zealand economy will benefit from greater export revenue once the Free Trade Agreement (FTA) trade deal is signed and ratified.

While there are still some issues to be worked through, the AIP is an important step towards the conclusion of an FTA between the two countries and builds upon the strong trade links between the UK and New Zealand.

This will allow British consumers access to best in-season products all year around, particularly during busy periods such as Easter and Christmas, which fall during the UK's off-season meat production window.

An FTA will allow New Zealand companies the opportunity to sell a wider range of high-quality products into the UK market, particularly beef.

Following the UK leaving the EU, New Zealand's 1300 tonne beef quota was split between the UK and the EU, leaving New Zealand with only 454 tonnes of beef access into the UK. Outside of this quota, New Zealand beef exports attracted tariffs of up to 70 percent, meaning virtually no out of quota trade occurred.

Improved access will allow companies to deepen and expand relationships, and crucially, compete on a level playing field with our international competitors.

While the red meat sector is disappointed in the length of the transition period, and quality of access is often in the detail of trade agreements, we recognise that this was a difficult negotiation and want to acknowledge the hard work of negotiators and the Minister to achieve this result.

With full tariff elimination after 15 years and quota volumes that grow until that time, companies will be able to build their interests in the UK market.

New Zealand and the UK are also ideal trade partners with British consumers having high expectations for the quality and ethics behind their food.

New Zealand and UK producers share common values and a commitment to high production standards and robust regulatory frameworks in important areas such as food safety and quality, animal welfare and the environment.

New Zealand is one of the most sustainable producers in the world and we are well-placed to meet British consumers' high expectations. New Zealand's free range, pasture-raised farming systems means that our product is seasonal and the perfect complement to the UK's northern hemisphere production.

For B+LNZ, and MIA, this has been several years of intensive work and negotiations to get this result for New Zealand farmers, exporters, and indeed all New Zealanders.

Looking forward, this is a positive step for the UK as it pursues membership of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) agreement. The sector will continue working with British counterparts to inform and support their efforts to join this agreement.

LOGISTIC DISRUPTIONS

The meat industry exports over one million tonnes of product, or more than 60,000 containers, annually and needs regular and reliable shipping services to get these containers to our diverse export markets.

However, COVID-19 has caused significant disruptions to the global shipping network. For example, there have been occasions where major global ports have had to significantly reduce capacity or shut down for periods of time due to COVID-19 restrictions.

This has a ripple effect throughout the entire network, which has resulted in significant disruptions to shipping schedules, large cost increases, shortages of equipment, particularly refrigerated containers, and long delays at ports.

These issues are largely a result of global problems, which New Zealand has little ability to influence. However, there are areas where the Government can work with industries in the supply chain to address domestic blockages. A return to full capacity and a clearing of backlogs relating to Auckland would be enormously helpful but the problem is much broader than the upper North Island. It will require an all-of-New Zealand, all-of-sector and all-of-Government approach.

TASTE PURE NATURE

The Taste Pure Nature country of origin brand is continuing to build awareness and preference for grass-fed beef and lamb from New Zealand in the United States (US) and China.

Our research shows that more and more Conscious Foodies are coming to understand that New Zealand has a unique natural environment and approach to farming that's perfect for producing high-quality and nutritious grass-fed beef and lamb.

Taste Pure Nature has allowed us to capitalise on the increased interest in naturally raised red meat that is safe, nutritious and sustainable in the wake of COVID-19.

We are continuing to successfully run marketing campaigns in partnership with meat processing and exporting companies aimed at growing awareness, creating preference and driving retail sales, including e-commerce, in the US and China. See the latest campaigns and results below.



US

B+LNZ has seen double-digit percentage increases in quantity (15%) and value (34%) of grass-fed beef exported to the US in 2020, signifying high demand and growing preference for New Zealand grass-fed beef.

Our consumer research shows several market trends are contributing to strong performance for New Zealand grass-fed red meat including a surge in at-home meal consumption due to COVID-19 and a focus on healthy eating and immunity-boosting foods.

According to IRI data, "100% Grass-fed" was one of the top 10 product claims consumers looked for in 2020. The overall fresh meat category also saw growth in 2020. Fresh meat sales were up 35%.

Recent campaign highlights

One of many companies taking advantage of Taste Pure Nature is Silver Fern Farms (SFF), which has seen a 36 percent increase in retail presence on the West Coast in just one year.

- Since May, we've executed two campaigns in partnership with SFF - a Summer Grilling campaign, which helped build brand awareness and drove consumers to e-commerce and retail to purchase, and an e-commerce campaign, designed to maintain e-commerce momentum for beef by promoting new beef bundles available on the SFF e-commerce site.
 - The Summer Grilling campaign included working with influencers to create original summer grilling recipes using Silver Fern Farms product. The campaign generated 550,000 impressions and 17,000 engagements on social media.
 - The results of the e-commerce campaign are still being tallied but early results look promising. Beef product sales increased 291% and revenue from beef sales increased by 254% during the campaign.



Beyond our work with partners, we've continued to find ways to elevate New Zealand grass-fed beef and lamb on a protein category level:

- In addition to our work with influencers and digital advertising, and to provide additional reach and impressions offline, we launched an outdoor advertising campaign in Los Angeles, featuring 18 billboards near Bristol Farms and Jons Fresh Marketplace Stores that carry New Zealand grass-fed beef and lamb. The campaign is running from late September to the end of 2021 and we expect it to deliver nearly 50 million impressions - we will keep you updated on how this goes.
- We're also diving into a couple of exciting partnerships to build awareness and drive preference for New Zealand grass-fed beef and lamb through new channels.
 - We are partnering with Meredith Digital, one of the leading publishing houses in the US that includes top-tier outlets like Food & Wine, Martha Stewart, Eating Well and Southern Living, among others, to elevate the New Zealand grass-fed story through video, social and digital promotion on Martha Stewart, Food & Wine and Eating Well. The content we're developing will go live later this year and we expect it to deliver around 5.9 million impressions.
 - We are also partnering with [Spiceology](#), one of the fastest growing spice companies in the U.S., to launch their new Blackberry Balsamic seasoning blend through an influencer campaign that will hero the blend in recipes using New Zealand grass-fed beef and lamb. The campaign includes 4 top-tier influencers ranging from [one of the founders of Spiceology](#) to Food Network personalities and grilling fanatics and will go live at the end of October and run through November. SFF is providing product for this campaign.



HEALTHIEST WAYS TO INCORPORATE RED MEAT INTO YOUR DIET

According to Samantha Cassetty, RD and nutrition consultant for Beef + Lamb New Zealand

BUY FROM FARMERS WHO RAISE ANIMALS HUMANELY AND RESPECT THE ENVIRONMENT

Healthier animals require few, if any, drug treatments, and sustainable farming practices result in cleaner water, thriving biodiversity, and healthy, productive soils. New Zealand farmers are committed to raising animals humanely while also protecting the water, soil, and air, ensuring the most nutritious, flavorful, and natural meat you can find. So, look for grass-fed meat from New Zealand.

DON'T HIDE THE PLANTS

Meat often dominates the plate while plant foods are set off to the side, so try reversing this approach and making plant foods the focus. Rather than having a steak with a side salad, make a big, colorful salad your centerpiece, and serve it with some sliced steak on top. When you embrace more plant foods and complement it with high-quality, nutrient-rich red meat, you're treated to a broader range of protective vitamins, minerals, and bioactive substances.

CHOOSE GRASS-FED, NUTRIENT-RICH MEAT

While all meat has nutrients, grass-fed beef and lamb from New Zealand are richer in vitamin A and E and have a more favorable fat profile. Grass-fed meat is lower in total fat and has a healthier omega 3: omega 6 ratio than grain-fed meat. Given its better nutritional profile, it pays to splurge on higher quality, grass-fed meat.

LIMIT THE AMOUNT OF PROCESSED MEAT YOU EAT

While grass-fed meat is a nutrient-rich whole food, processed meats – like bacon and jerky – are heavily processed, as the name implies and have been tied to a higher risk of certain cancers, so they should be eaten occasionally instead of every day.

PARTICIPATE IN PLANNING

Meal planning can help you reduce food waste, which is especially important when choosing red meat. Buy only the amount you need for your weekly meals and freeze any surplus, so none goes to waste. If you have leftovers, make sure to refrigerate and eat within 3-4 days.



www.beefandlambnz.com

- We sent a summer-themed mailer filled with a variety of our food clients' BBQ and picnic essentials, including New Zealand grass-fed beef and lamb. The mailer was sent to 16 top national consumer media, including Well+Good, Today.com and HuffPost, to introduce them to Beef + Lamb New Zealand and help keep our grass-fed beef and lamb top of mind. SFF product was included in the mailers.
- We partnered with five social media influencers, including two attendees from our 2019 New Zealand Familiarization Trip, to create ongoing digital and social media content that elevated the New Zealand grass-fed beef and lamb story and provided education and cooking inspiration. The five-month program resulted in 16 new recipes and generated more than 40 pieces of content and over 9.8 million impressions.



- On social, our ['Healthiest Ways to Incorporate Red Meat into Your Diet'](#) infographic was seen over 22,240 times on Pinterest, making it our highest reaching Pin to-date. This pin stemmed from tips we developed through our partnership with well-known registered dietitian Sam Cassetty.
- We've rolled out a series of website updates over the last few months, including new filters on the [recipes & tips](#) page to make it easier than ever for Conscious Foodies to find recipes that fit their tastes, creating a new [Discover](#) page that provides a holistic overview of the many benefits of grass-fed beef and lamb from New Zealand, and introducing new animated graphics to add increased visual interest. We've also added a "where to buy" section promoting our exporter brands and their retail partners making it easier for interested consumers to find our grass-fed beef and lamb.
 - Additionally, interest in Taste Pure Nature from meat processing and exporting companies continues to grow, so we have added four new brands to our US partner webpage including [Te Mana Lamb](#), [Broadleaf Game](#), [NZ Springvale Beef](#) and [Pasture Perfect](#).



CHINA

Social Media Engagement

Led by our Chinese consumer insights, B+LNZ launched Taste Pure Nature channels on two more social media platforms *Douyin* and *Little Red Book* in the third quarter of 2021. This completes our social media suite in China covering the top three social media platforms:

How we're using each social platform:

- Little Red Book is a seeding platform for a female dominant audience to discover, research and share content about NZ grass-fed red meat, retail experiences.
- Douyin (Chinese version of TikTok) is where content is pushed to its users who have indicated an interest in quality food, nutrition, health and fitness, many of whom would be our target audience - Conscious Foodies.
- WeChat is used as a Taste Pure Nature brand platform with mostly text and image content for consumer to learn about New Zealand grass-fed beef and lamb and why they should choose it.

Retail Campaigns

Mid-autumn Festival is one of the most important festivals for Chinese families where traditional foods and family meals are shared to celebrate harvest and family togetherness. Its cultural significance is similar to that of Thanksgiving in the US. This year, B+LNZ partnered up with Alliance, ANZCO and Silver Fern Farms and launched retail campaigns with premium retailers including Alibaba's Hema Fresh in Shenzhen, JD's 7 Fresh, AEON and Hualian Premium in Beijing.

These campaigns used multiple online and offline touchpoints to raise awareness of New Zealand grass-fed red beef and lamb and encourage trial and purchases via:

- Social influencers publishing video and graphic content on the benefits of NZ grass-fed beef and lamb and the retail promotion on the top four Chinese social media platforms - WeChat, Douyin (Chinese version of TikTok), Little Red Book and Weibo. The campaign generated over 5.5 million views within the first week of launch.
- Paid advertising on WeChat targeting consumers based on their demographics, geo-location, interests and shopping preferences. This is expected to deliver over 2 million views and drive traffic to the ANZCO and Taste Pure Nature campaign landing page on WeChat. We will report on the outcome when the data becomes available.

- Out-of-home advertising including 7,700 digital screens and 895 printed adverts near/in elevators and 146 outdoor adverts at the entrance of apartment complexes and business building. These are expected to reach over 25 million consumers who live or work in the vicinities of the retail stores and drive them into the stores.

Innovative Partnership Programmes

Our Innovative Partnership Programme was launched in July with a focus on incubating and nurturing new product solution ideas, collaboration with affiliated brands and retailers in order to:

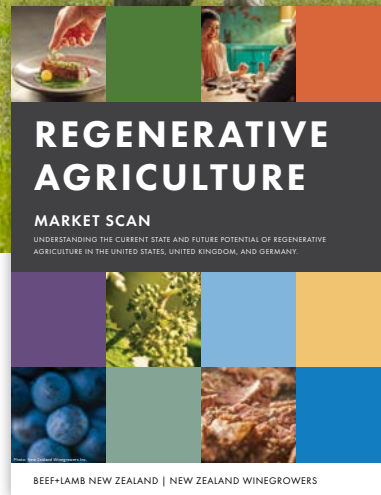
- Build continued awareness and preference for New Zealand grass-fed beef and lamb;
- Elevate the New Zealand grass-fed origin story;
- Educate consumers on the benefits and key differentiators of New Zealand grass-fed beef; and
- Create a direct link between awareness and available product through dynamic partner campaigns.

Some of the programmes under way:

A NZ grass-fed red meat zone created at Swiss Butchery, a high-end specialist retailer in Shanghai where no customised branding had been allowed before. This was followed by recipe creation and a series of staff training workshops and culinary classes with VIP customer and social influencers who then created and shared content on their own social media channels.

½ Way Hamish is a partnership with Shanghai-based Kiwi chef Hamish Waddle, Executive Chef at the iconic M on the Bund and M Glam restaurants. The concept is for our chef to design and create meals with unique New Zealand and Pacific flavours for consumers to finish cooking, plate up and enjoy at home. It is another way for us to introduce the TPN taste experience to Chinese Conscious Foodies in a convenient and fail-proof way that suits their busy lifestyle. Nearly a dozen concepts have been created and tested which has led to two meal concepts to be commercialised in October and November.

Three other programmes are to be rolled out in the fourth quarter of 2021 including another high-end retail partnership, Les Mills social media campaign and CCP Flavours. Watch this space!



THE MARKET POTENTIAL FOR REGENERATIVE AGRICULTURE

In October, B+LNZ and New Zealand Winegrowers (NZW) released the ground-breaking report into the market potential of regenerative agriculture for New Zealand.

The report shows there is a significant opportunity for New Zealand to position itself to take advantage of the global regenerative agriculture trend. Our research shows that in the mind of consumers, the majority of New Zealand's sheep and beef farming practices naturally align with key pillars of regenerative products or production.

B+LNZ has taken a leadership approach for industry because we have a role in researching and looking for new opportunities to create extra value from our natural and sustainable production systems and providing pathways for farmers and processors to capture value from these opportunities.

This is the first step and we now need to work with farmers and meat processing and exporting companies to develop a plan that enables farmers to capture this potential value.

Key findings from the research

- There is an opportunity for New Zealand to position itself to take advantage of the global regenerative agriculture trend.
- Although still in its infancy, regenerative agriculture is gathering momentum and is set to become a significant trend in food internationally.
- Brands are beginning to follow the leads of farmers and growers in the support of regenerative agriculture, and while the concept has yet to properly take hold among consumers, this research reveals there is a bright future.
- Consumers indicate a willingness to pay more for regeneratively-produced food, especially if science can show it tastes better, is better for people's health and better for the environment.
- Narratives that focused on the potential taste, health and environmental benefits of regeneratively produced food products resonated strongly with consumers, specifically the potential for regenerative agriculture to be part of a climate change solution.
- We believe the majority of New Zealand's sheep and beef farming practices naturally align with the key pillars of regenerative products or production.
- This isn't to say all farms are applying all regenerative agriculture principles all the time, but in general, New Zealand is better placed than other countries to meet these requirements. Our farming systems are so different from "conventional" agriculture in countries such as North America with their feedlot-raised beef and sheep meat.

Research background

- Interest in regenerative agriculture among food producers, brands and consumers has been growing globally. While debate continues about what the term constitutes and its effectiveness versus conventional agriculture, limited work has been done to date to understand its potential among end-consumers.
- In 2020, B+LNZ (with guidance and support from many meat processing and marketing companies), New Zealand Winegrowers (NZW), and with funding support from the Ministry for Primary Industries' Sustainable Food and Fibre Futures fund, commissioned Alpha Food Labs (Alpha Foods) to conduct research to understand the current state and future market potential of regenerative agriculture in food and wine within three of New Zealand's international markets – the United States, Germany and the United Kingdom.

Next steps

- B+LNZ will now work with farmers and meat processing and marketing companies to develop a plan on how the red meat sector can capture this potential value for New Zealand.
- This will include exploring sector wide initiatives such as how regenerative agriculture aligns with Taste Pure Nature, and the place of the New Zealand Farm Assurance Programmes.
- There is no clear and unified definition of regenerative agriculture globally, New Zealand should define what 'regenerative' means in a New Zealand context before others define it for us.

This is a substantial piece of research which provides a platform for the industry to make an informed decision about the way forward on this potential opportunity. Some processing companies are already exploring these opportunities such as Silver Fern Farms and Atkins Ranch. We will ensure we engage with farmers as we take this conversation forward with meat processing and marketing companies.

Read the media release containing the summary and full report here: <https://bit.ly/3FiAf6V>



ENVIRONMENT

The environment remains a major priority for the sector, including progressing work at farm level to improve the environment and engaging with the Government on policy.

FARM PLAN

Farm plans are the primary means by which B+LNZ will support farmers over the coming years to get ahead of business, consumer and regulatory requirements.

Since the launch of B+LNZ's updated farm planning approach in March, more than 350 farmers have attended environment farm plan workshops throughout the country – covering soil health, freshwater ecosystem health, native biodiversity, climate change and forage cropping (including winter grazing).

Feedback from farmers attending the workshops has been overwhelmingly positive, with most feeling confident to document the majority of their farm environment plan following the first workshop. Farm plans are most effective when developed on-farm, by the farmer or the farm team.

A further 500 farmers have also attended specific forage cropping events to assist the documentation of their winter grazing plans.

While B+LNZ is committed to supporting farmers at each stage of the farm plan process, the farm plan reference material and templates have also been made available on the B+LNZ website for farmers who want to get started on their own. More information is available at www.beeflambnz.com/farmplan

Work has been undertaken to ensure the farm plan materials reflect the latest requirements, with an update to the climate change chapter released in early September. Work is also underway on building a digital greenhouse gas action plan that allows farmers to more easily record their data and contribute to the He Waka Eke Noa 2021 milestones.

B+LNZ continues to seek recognition of the forage cropping and freshwater chapters of the farm plan as meeting the requirements of the certified freshwater farm plan.

BIODIVERSITY

Biodiversity rules have been in the news as farmers reported growing concerns about activity by councils to map Significant Natural Areas (SNAs).

In regions such as Northland and on the West Coast where mapping was taking place, up to 60 to 80 percent of land on farms would be defined as an SNA, with no clarity on what activity farmers will be able to undertake on that land.

In June, B+LNZ called on the Government to clarify its intent around the Biodiversity National Policy Statement (NPS) and recommended the Government ask regional and district councils to pause their mapping of SNAs until the policies are clearer. Mapping appears to be on hold but the wider problems around the policy settings remain. It's essential to get these right so that when they are introduced, they land well with farmers and gain support.

At time of writing, the Government had not made an announcement on its plans for the NPS, first announced in 2019, although B+LNZ is continuing to push for a further delay. B+LNZ has repeatedly said farmers are already dealing with an unprecedented amount of environmental regulation and there's still a lot of work to do to get the existing rules right – particularly on freshwater – before introducing new ones.

Farmers are not against the protection of biodiversity and they actively and proudly manage native vegetation on thousands of farms across the country – around 25 percent of sheep and beef farms are covered in native vegetation.

B+LNZ's position is that farmers must have the ability to integrate indigenous biodiversity within their pastoral systems and to be recognised for the benefits existing habitats on farms provide, as well as to be rewarded for their work to protect native species.



FRESHWATER

Work is ongoing to make the essential freshwater rules workable and effective.

The Government announced four separate but related consultations relating to these rules in August and September:

- changes to the low-slope map for stock exclusion
- certified freshwater farm planning
- changes to the intensive winter grazing rules
- changes to wetlands definition and allowable activities.

While disappointed the four aspects of the essential freshwater package were not addressed as one coherent consultation, B+LNZ was supportive of some of the changes proposed and appreciated the Government's willingness to address many concerns that had been raised about unworkable aspects of the rules.

However, there were significant remaining concerns about over-prescription and inflexibility, or a lack of important detail.

The most significant area of concern was around certified freshwater farm plans – specifically around how they would be used and rolled out, the role of existing farm plans, certification and auditing, the relationship of farm plans to regional planning and consent, as well as the capacity of rural professionals to support the approach. B+LNZ is committed to industry-led farm plans and has concerns about turning farm plans into regulatory tools. Freshwater farm plans need to be practical, active and focused on on-farm risks. The way the rules were written could inadvertently undermine some of the core benefits of farm environment planning.

[In its submission](#), B+LNZ asked the Government for a further round of consultation on the detailed set of regulations and guidance for freshwater farm planning.

B+LNZ worked with other sector groups to ensure responses were aligned across the consultations.

B+LNZ's Catchment Community Programme

Farmer-led catchment community groups are a great platform for building thriving farming communities, valued by all New Zealanders – B+LNZ's vision.

B+LNZ's Catchment Community Group Programme supports farmers to take a leadership approach in their communities by offering a range of resources and support including e-learning modules, a national catchment map, trained catchment facilitators and training workshops, podcasts and much more.

Over the last two and a half years, we have established a project to improve the water quality across four catchment groups with help from the Ministry for Environment's Freshwater Improvement Fund.

One of these four catchment groups was the Thomson's Creek Community Catchment Group in Central Otago.

In late 2019, four consultants were employed with help from B+LNZ and funding from MfE to work with every farmer in the Thomson Creek catchment to create a Farm Environment Plan.

Learn more about this project and its success in a video on YouTube here: <https://youtu.be/tyjMf5mplys>

More resources are being developed as the programme continues to support groups.

For more information about the programme, visit: www.beeflambnz.com/your-levies-work/community-catchment-group-programme

CLIMATE CHANGE

Like all sectors, farming needs to play its part in halting global warming. There is a significant amount of work under way to ensure that what the sector is being asked to do is fair and equitable. Since the passage of the Zero Carbon Bill B+LNZ has actively advocated for the Government to review the methane targets using the GWP* metric and to start reporting on the warming impact of various gases.

Climate Change Commission

In June the Climate Change Commission released its final advice to Government. The sector was heartened to see the Commission had taken on board some of its feedback – such as in its strengthened advice on the need to change the ETS to manage afforestation. Its advice that New Zealand must cut gross carbon dioxide emissions was welcomed, although it was noted that there are still far too many exotic trees forecast to be planted on productive farmland.

We also welcomed the Commission's continued endorsement of the 'split gas' approach domestically to treat short-lived and long-lived GHGs differently to reflect the warming impacts of different gases on the atmosphere. The Commission and the Government should start reporting on the warming impact of various gases so the public can understand the different contribution each gas is making to climate change.

Concerns remain about the Commission's recommendations around the methane reduction budgets. The Commission recommended the Government implement measures that would lead to reductions beyond the level of ambition compared to the 2030 biogenic methane target in the Zero Carbon Act.

B+LNZ and MIA continues to advocate on these issues.

IPCC report

In August the Intergovernmental Panel on Climate Change (IPCC), the world's leading authority on climate science, released its Sixth Assessment Report summarising the latest climate change science from around the world.

The report reinforced that climate change is real and is already contributing to extreme weather events. It's apparent everyone – including farmers – has to contribute to reducing emissions in order to keep global warming in check. However, the report contained some important details on the metrics for short-lived gases that have significant implications for our sector.

Chapter 7 of the report makes it clear that the impact of methane has been overstated when emissions are not increasing (as is the case in New Zealand). This means New Zealand's current targets for reducing methane emissions (24-47 percent by 2050) do not 'let farmers off the hook' but may actually be asking more of methane producers than fossil fuel emitters.

While we still have to tackle methane emissions, this report should help set targets that are fair and appropriate.

The report recommends countries treat short-lived gases such as biogenic methane differently from long-lived gases such as carbon dioxide. This is effectively an endorsement of New Zealand's split gas approach, which B+LNZ and MIA advocated for, in the Zero Carbon Act.

B+LNZ and MIA will use the IPCC's findings as it continues to advocate for a fair approach to the Government's Emissions Reduction Plan that ensures all sectors of society and economy are contributing, and that recognises the work farmers are already doing to shift to more sustainable food production.

He Waka Eke Noa

The He Waka Eke Noa Primary Sector Climate Action Partnership continues to be a major focus for B+LNZ and the MIA and their farmers and members.

With the first programme milestone approaching – by the end of 2021 a quarter of farmers need to know their annual total on-farm emissions and have a written plan to manage emissions – the focus has been on helping farmers with practical tools and resources. Key to this has been the development B+LNZ's GHG Calculator (see below) and B+LNZ's farm plan (see previous section).

Good progress has been made on meeting the first milestone – helped by milk processors supporting dairy farmers to know their numbers – and work continues on this.

Attention is also turning to options for the framework that covers a farm-level pricing system and the recognition of on-farm sequestration. Farmer feedback will be sought on this before the partnership provides advice to Government in early 2022.

B+LNZ's GHG Calculator

This free tool for measuring and reporting on-farm GHG emissions and sequestration was launched at the beginning of July.

Farmers can do a simple calculation using their existing farm area and stock numbers to get started with their emissions numbers. They can then add further information to get a more complete picture of their farm including sequestration.

GHG Calculator results show emission volumes for each gas without any conversion and also provide results in the commonly used metric of GWP100 so that farmers can relate more general conversations of GHG measurements back to their own business (this does not mean B+LNZ endorses the use of the GWP100 metric for short-lived gases, or the current reductions targets).

The GHG Calculator has been approved by the He Waka Eke Noa programme and it has been endorsed by 12 meat processors and the MIA.

In addition to processing companies, B+LNZ is also working with partners such as accountants and banks to help farmers use the tool.

Feedback from GHG Calculator users has been very positive, particularly about its ease of use. Farmers can either complete the tool themselves on-farm or attend a workshop for additional support. Around 2000 farmers used the GHG Calculator in the first three months after launch.

Afforestation, particularly carbon farming

Farmers, land agents and others on the ground continue to report huge areas of productive sheep and beef farmland being sold into carbon farming, with adverse effects on rural communities and the economy. The impact on meat processors through declining stock numbers could be significant – as could the effects on export earnings.

In August B+LNZ released independent research by BakerAg that validated the extent of sheep and beef whole farm sales for conversion into forestry. It showed the carbon price was contributing to the significant increase.

- In 2017 3,965 hectares were sold.
- This increased to 20,227 hectares in 2018.
- It further increased to 36,824 hectares in 2019.
- It declined to 16,764 hectares in 2020 (most likely due to COVID-19) but rural intelligence suggests it has regathered momentum in 2021 and moved into new regions.

Analysis of land titles showed an estimated 34 percent of the whole farm sales was to carbon only entities.

The amount of land intended to change into forestry each year (whole farm sales plus funding to plant exotic trees within farms under two Government schemes) already exceeds the levels of afforestation recently recommended by the Climate Change Commission for meeting our Zero Carbon Act targets.

B+LNZ was disappointed the Government disputed the numbers by mischaracterising the report – which focused on land sold with the intention to plant. Government data is based on the actual planting of trees in the ground and there is often a two- to three-year lag between a farm sale and seedlings going into the ground.

Public and media interest remains steady. For example, RNZ's Nine to Noon programme has run a series of in-depth interviews about it.

B+LNZ will continue to work with groups such as 50 Shades of Green and advocate for urgent action on limits on the amount of offsetting fossil fuel polluters can access, before further damage is done. The integration of forestry on farms is a better approach and can go a long way to enabling New Zealand to meet its climate change targets.

Life-cycle analysis of New Zealand red meat

The red meat sector is in the spotlight globally in terms of GHG emissions, and New Zealand exports high volumes of sheepmeat and beef with a reliance on shipping to get its products to market. It's therefore important the sector, consumers and policymakers understand the climate footprint of our products, how our footprint compares with other international producers and how we can improve.

There's an increasing focus on carbon footprints. However, carbon calculators being developed use global averages and methodologies not suited to agricultural products and don't reflect the unique footprints of particular countries – New Zealand's extensive pasture-based farming methods have a lower impact.

B+LNZ and the MIA commissioned a study by a world expert on lifecycle analysis (LCA) of livestock systems, Dr Stewart Ledgard of AgResearch, and a literature review of published studies on the carbon footprint of a range of meat sources across a number of countries.

The results will be published before the end of 2021.



INNOVATION AND RESEARCH

The sector is continuing to invest heavily in research and development.

GENETICS

Government announces support for Informing New Zealand Beef (INZB programme)

In September, B+LNZ announced its partnership with the Government on a \$16.7 million beef genetics programme. The seven-year partnership has the potential to increase the country's beef sector profit by \$460 million over the next 25 years.

The INZB programme will provide farmers with the genetic selection tools they need to breed animals better suited to their farming system.

For some, it may be a focus on health traits such as Facial Eczema, while others may focus on meat quality traits aligned to a customer programme, or environmental efficiency in their animals.

The first calf born through the Beef Progeny Test in the INZB programme (run at Pamu's Kepler Farm near Te Anau) arrived in September. We have a total of 132 heifers due to calve to AI sires (Hereford and Angus) this September.

Bull nominations for the 2021-mating of the progeny test closed at the end of August. Successful sires will be published to industry once all the bulls are successfully collected (November).



Dairy Beef Progeny Test

The Dairy Beef Progeny Test (DBPT) is progressing well at Renown (Pamu) in Taupo despite some changes on the farm. Sire selections for the 2021 mating have recently been completed. These selections were made with a changed emphasis; from proving to dairy farmers that beef bulls are viable for mating dairy cows (i.e. won't cause calving problems or reduce days in milk) to identifying bulls which satisfy the dairy requirements while also producing calves which grow and produce a high quality carcass.

The relationship with LIC is working out well and the dairy-beef progeny test is providing an avenue for wider collaboration.

Facial Eczema Elimination Strategy

B+LNZ's research team has developed a strategy with the ambitious goal to "Eliminate facial eczema as a disease of livestock in New Zealand". We recognise that this a big challenge and are appreciative of the support from the industry especially AgResearch. Together with farmers, scientists, rural professionals and industry, we have identified our knowledge gaps and potential avenues for solutions in a research proposal. We are now trying to secure co-funding for this larger body of work.

In the meantime, B+LNZ have initiated one of the first steps to supporting the elimination of facial eczema (FE), which is to develop a non-invasive approach to determine if an animal is tolerant to the toxin associated with FE.

Non-invasive test for facial eczema tolerance

Initial results from a pilot study investigating the potential for a laboratory test to determine facial eczema tolerance are positive, paving the way for more detailed investigation. The study, funded by B+LNZ and conducted by AgResearch, aims to produce a fully validated high through-put commercial test, which is readily available for breeders and commercial farmers. Initial results look promising with the establishment of a cell culture method, using sheep and cattle blood, to demonstrate sporidesmin (the toxin that causes FE) toxicity. This indicates that animals could be tested for tolerance without needing to be exposed to the toxin. Saliva tests also showed some promise and could be explored further to form the basis of a diagnostic test. The overall results build a strong case for progressing to the next phase in the development of a commercially available FE test.

HILL COUNTRY FUTURES PROGRAMME

The [Hill Country Futures](#) (HCF) is focused on future proofing the profitability, sustainability and wellbeing of New Zealand's hill country farmers, farm systems and rural communities. The programme includes four main research areas:

1. Development of a 'pathways' framework
2. Landscape classification tools
3. Biodiversity in forage landscapes
4. Communities to market

Here are some snapshots of what is currently happening in the programme.

We wanted to understand what farmers, decision makers and influencers think are the best outcomes for the future of hill country farming. To do this the HCF project team talked to 298 people in 170 interviews. Read about the key takeaways from these interviews on the Hill Country Futures website (link below).

Data on the growth profiles of legumes and other pasture species are being collected from a total of 13 research and commercial farms and extracted from publications and available (historical and current) datasets for the national database of pasture production (AgYields).

This will be a readily available open database of pasture and crop yields from throughout New Zealand, where anyone can put in pasture growth rates they have measured. Farmers will be able to access this information to help inform decisions of 'which legume where'. For instance, if they are thinking of growing red clover or lucerne but are unsure about how it would perform in their environment, they can look for information on previous growth rates in their area. The resource will also be of use to agricultural consultants and anyone planning feed budgets.

It is planned to launch AgYields at the New Zealand Grasslands Association (NZGA) conference in February 2022.

More information on what is happening in the HCF programme can be found on their website, visit www.hillcountryfutures.co.nz

PARASITES

Strategic Review of Wormwise

A strategic review of Wormwise was undertaken earlier this year in the face of worsening drench resistance. The refreshed strategy will be rolled out in the coming months.

Conducted through interviews with Wormwise participants and stakeholders, a farmer survey and workshop, the review identified the need for transformational change in the way drench is being used and the need to encourage alternative parasite control practices.

The review identified six action areas;

- Farmer education: To empower farmers with knowledge and tools to act.
- Rewards for good practice: To create 'pull' for practice change at farm level,
- Non-farmer education (eg veterinarians, stock agents, sales people, breeders) to improve advice and support to farmers.
- Product (drench) stewardship: to align market drivers with sustainable and appropriate drench use.
- Data and Evidence: To provide a solid foundation for action and investment.
- Wormwise Resourcing: To support collaboration and coordination to achieve these objectives.

From these action areas, it is anticipated a dedicated Wormwise resource will be developed, there will be enhanced engagement with farmers and a voluntary code of responsible marketing and sales of drench will be developed.

In addition, there will be a national drench resistance survey and modelling capability, a benchmarking study of the costs/benefits of different approaches to parasite management, improved testing options and integration of Wormwise materials into relevant sectoral formal and informal training, education and professional development.



PASTURE-RAISED ADVANTAGE

The \$2 million Pasture-Raised Advantage Nutrition study is assessing the health and wellbeing benefits of pasture-raised beef and lamb compared to grain-finished beef and plant-based proteins.

The study focusses on providing robust scientific data about the nutritional impact of including naturally pasture-fed, antibiotic and hormone-free beef and lamb raised and processed in New Zealand as the protein of choice in a balanced diet.

The programme of research is funded by the Meat Industry Association, Beef + Lamb New Zealand Ltd, the High-Value Nutrition National Science Challenge and the Ministry of Business, Innovation and Employment.

In the latest study, the Riddet Institute found there are differences in meat quality relating to health and digestion, depending on how the animal is raised.

The research team led by Dr Lovdeep Kaur and Dr Mike Boland from Massey University's Manawatu campus compared the digestion differences between pasture-raised New Zealand beef to grain finished beef, and a plant-based alternative.

To mimic the human digestive tract, researchers used simulators in the laboratory to observe the differences.

They found differences in the fat content of the beef, potentially leading to better health outcomes.

Meat and the alternative plant-based product are made up of various components including fat and protein. When we digest food, our body breaks it down for us to use to do a range of functions, including building muscle and providing an energy source.

This research showed:

- What an animal eats impacts the nutritional properties of meat. This work confirms animals eating pasture raises the levels of omega-3 fatty acids in meat, particularly long chain omega-3 PUFAs when compared to meat from grain-finished animals. It is well known these fats (that we typically find in fish), provide health benefits such as improving blood cholesterol
- Digestion studies show that pasture-raised beef provides more of the desirable omega-3 fatty acids when the meat is digested, compared to that released from grain-finished beef. The plant-based alternative used in this study contained no long chain omega-3 PUFAs.
- Beef is highly digestible, meaning it breaks down efficiently. The plant-based alternative used in the research had lower digestibility during the course of digestion.

This study forms part of a larger programme currently underway examining the nutritional value of New Zealand pasture-raised beef, as compared with grain-finished beef and with a plant-based substitute.

The research is the second part of the study. Part one was undertaken by AgResearch, analysing the overall nutritional profiles of the meat. Researchers from The University of Auckland will then oversee the final two stages, clinical studies investigating both the short-term and long-term well-being and health effects of red meat consumption.



ARTIFICIAL INTELLIGENCE - CUT SELECTION

A priority in the Red Meat Sector Strategy is to utilise innovation to guide development of future processing plants, and within that, a specific goal to investigate the development of a platform for hands-free or automated meat inspection. Current inspection processes are heavily reliant on observation and visual assessment of the carcasses and eviscera by teams of highly trained inspectors. We believe there is opportunity, in the first instance, to aid and augment inspectors by training intelligent visioning systems to recognise and identify common visual defects found by inspectors.

As a first step in understanding the development of this technology for meat processing, we are investigating the power of artificial intelligence to “see” and make decisions in a boning room, by teaching an AI to recognise meat cuts on a conveyor belt.

Spark64, a New Zealand based emerging technology company, is training a first-generation AI system to recognise five specific cuts of lamb on a conveyor belt, with first attempts reaching accuracies of >80% from images captured using a hand-held go-pro camera. The next stages of the work will expand the training set for the AI to improve its accuracy and manage the identification of cuts when the image is challenging, for instance when meat on the conveyor is piled together or occluded by other objects.





HEALTH, SAFETY AND WELLBEING

EXOSKELETONS

MIA has been working alongside Alliance and Silver Fern Farms to investigate the uptake of exoskeletons as a processing aid for meat workers.

Exoskeletons are spring-loaded, non-mechanical wearable devices that are worn to assist or “augment” workers and provide strength and support for mechanical and repetitive tasks. There is opportunity for these suits to be used in processing operations where body stressing of shoulders and back is of concern, such as those undertaken on the slaughter floor and within boning rooms. The use of the suit could assist with injury recovery and increase body resistance to fatigue.

The bulk of the work is being undertaken by the companies’ health and safety experts, who are engaging with their workers and health and safety representatives onsite working with those who will be using the exoskeletons to ensure we identify the tasks which most benefit from the tool. We are finding that the suits will have use for particular roles in processing, but are not suitable for all jobs in the plant. They are an additional piece of protective equipment for workers, not an all-day, everyday tool for every job on the line.

The focus of the MIA part of this project is to consider the food safety aspects of introducing exoskeletons in hygienic processing areas and ensure that the technology can be used without impacting food safety standards in primary and secondary butchery operations. Results from the trial will be made available to industry later in 2021-22.

FARM SAFETY

The health and safety of our people and our farmers is paramount.

It has been another disruptive year with COVID-19 resurfacing in our communities and Alert Level changes throughout the country. However, B+LNZ remains committed to keeping farmers, food producers and staff healthy and safe. We’re closely monitoring Government advice regarding the evolving Coronavirus (COVID-19) situation. We are providing advice for farmers on our COVID-19 webpage including a ‘Preparing for COVID-19 on farm’ cross-sector checklist, advice for what to do if someone on farm is exposed to COVID-19 and more.

We encourage you to have a plan in place, stay vigilant and keep looking after yourself and your loved ones.

Unfortunately, too many farmers are still getting injured or dying on New Zealand’s sheep and beef farms every year.

We continue to build strong relationships with WorkSafe New Zealand and the Agricultural Leaders Health and Safety Action Group (ALHSAG).

During the extreme weather events we’ve experienced around the country, our Extension Managers have been heavily involved in activities to help farmers by working with their local Rural Support Trust and other industry partners.

LOOKING AFTER OUR PEOPLE

Surfing for Farmers

B+LNZ have always been great supporters of Surfing for Farmers, an initiative that is helping improve mental health and wellbeing in rural communities by getting people off farm.

We’re very excited to now have a formal partnership with Surfing for Farmers, which is now in 21 locations across New Zealand. Keep an eye on [Surfing for Farmers’ Facebook page](#) to see the events near you.

Farm Safety Systems

B+LNZ have also continued with our Event Safety Management System workshops for staff and facilitators who run our events.

We’re reviewing the Farm Safety System to keep it up to date. This happens every three years.

Crush Protection Devices

Every year, quad bikes are a major cause of death and serious injury on farms with many incidents associated with accidental rollovers. On average each year five people die, and there are over 1,000 claims for work-related quad bike accidents, costing \$12 million.

Our primary focus is on ensuring farmers use the right vehicle for the job and have the competency to use that vehicle safely, however Crush Protection Devices (CPDs) are a useful tool to minimise the risk of serious injury if someone is riding a quad bike and is involved in a rollover accident.

A CPD can be fitted to a quad bike to provide a survivable space should a rider be pinned underneath it.

ACC is offering a subsidy to help rural businesses buy CPDs. The subsidy offer is \$180 per CPD with a maximum of two CPD purchases per business (including self-employed).



PEOPLE AND TRAINING

Our sector is a major employer in New Zealand. Attraction and retention, and the health and safety of workers, are key issues.

MIA SCHOLARSHIPS

MIA, supported with funding from the Food Innovation Training Trust, has 20 scholars enrolled in its scholarship programme in 2021. This year's group is diverse and includes both under and post graduate students across a range of disciplines, including the sciences (food and agri-technology, engineering, health), marketing, business, law and economics.

Traditionally the scholarship has focused on the award of a stipend, but in 2020 was enhanced by the addition of a mentorship aspect to the programme which includes group meetings and one-on-one mentoring for the scholars.

In 2021, a workshop for the scholars was included as part of the Annual Red Meat Sector Conference and the group was sponsored to attend the conference and gala dinner, held in Rotorua. Feedback from both the scholars and conference participants highlighted the success of bringing the group of young, emerging leaders to the industry forum and the opportunities it provided for them to learn more about the sector and engage with leaders in the industry.

IMMIGRATION

Immigration issues continue to be a significant source of frustration, given the border closure and the uncertainty created by the Government's immigration reset.

MIA has continued to engage with numerous Ministers, the Ministry of Business, Innovation and Employment and the Ministry for Primary Industries and the New Zealand Meat Workers and Related Trades Union on immigration issues, including trying to restart the Industry Sector Agreement (ISA) negotiations to allow easier access to halal butchers and other skilled migrants. However, the ISA is still on hold due to COVID-19 with no clarity as to whether it will be re-started by officials.

The ability to bring in migrant workers to make up the shortage of New Zealand workers remains a priority area. In particular, the meat industry faces ongoing frustration at the process followed by Immigration NZ with respect to the visa settings for halal butchers.

Halal processing, underpinned by a robust regulatory framework, has become a key aspect of the industry's business model. In 2020, approximately 43 percent of New Zealand total red meat exports were halal certified for Muslim consumers around the world and contributed approximately \$3.3 billion in export earnings. Ordinarily, there are 250 halal butchers who work in the meat industry comprised of 100 New Zealand residents / citizens and 150 migrants. As at June 2021, there are under 100 migrant halal butchers under the MIA Approval in Principle (AIP). Due to the border closure there is no clarity on when, or if, the industry will be able to recruit additional migrants to meet the 50-odd shortfall.

Most migrants received various visa extensions and from July 2021 workers of any skill level have the ability to apply for a two-year visa. MIA was granted the last AIP (due to the new Accredited Employer Work Visa that Immigration NZ are introducing) to employ 137 migrant halal butchers who are on shore for a two-year period. However, neither the extensions nor the AIP allow new halal butchers to enter New Zealand. The introduction of the stand-down that applies to low skilled workers after working in New Zealand for three years has also been delayed.

The one-off residence pathway for migrants announced by the New Zealand Government in September was a significant boost. The residence pathway will deliver much-needed certainty for our people and support the industry to continue maximising export revenue for the benefit of New Zealand.

Without this pathway, many of our people, including halal butchers, faced losing their right to stay in New Zealand.

MIA continues to try and source halal butchers who are on-shore through an extensive recruitment programme, working with Muslim associations, community groups and Government agencies including the Ministry of Social Development (MSD).

The Government has consulted on a number of policies in the industrial relations area which will have significant implications for the meat industry. MIA is following the development of such policies and working with members, Ministers and the Ministry of Business, Innovation and Employment to ensure that the policy settings are appropriate to support the vitality of the meat industry.

PEOPLE, FOOD AND FIBRE WORKFORCE DEVELOPMENT COUNCIL

This year B+LNZ welcomed a strong industry voice in the new vocational education and training entity called Muka Tangata – People, Food, and Fibre Workforce Development Council (WDC) which will play a vital role in vocational education and training.

The Muka Tangata – People, Food and Fibre WDC is one of six new industry-led and governed WDCs as part of the Reforms of Vocational Education (RoVE) that will provide greater industry leadership across vocational education and training.

We are really pleased to have B+LNZ's ex-Chief Insights Officer Jeremy Baker lead the WDC and Paul Crick, B+LNZ's National Farmer Council Chair is in the group amongst other council members with strong pastoral sector connections and understanding such as Bernadette Kelly from Pāmu, Geoff Taylor from DairyNZ, and Warwick Tauwhare-George (Parinihi ki Waitotara), alongside many other excellent industry representatives.

Having a strong industry voice on the WDC means the sector can look forward to a coherent range of training services from the reformed vocational education and training system that better meet our needs.

EMPLOYMENT HUB

As part of B+LNZ's commitment to supporting, growing, training and retaining people in our sector, we developed an online 'Employment Hub' to assist farm owners and managers at every stage of their employment journey.

Farmers have told us that they are struggling to employ and retain staff with unclear entry points, limited employment experiences and little to no support during this process.

Our Employment Hub pulls together all the information and resources into eight stages of employment to help assist both employers and employees with recruitment, defining on-farm roles, the application process, employee development, and more.

In the last six months, the Employment Hub has had more than 1,570 views with the average time people spend on the website being double the average.

We are deliberately not focusing on legal and human resource support because Federated Farmers, local Chambers of Commerce, and many commercial operators already provide this information.

The feedback has been excellent from farmers using the tool and we encourage you check it out for yourself by visiting www.beeflambnz.com/employment-hub

We will continue to grow the hub to provide advice and guidance on all aspects of recruitment and retention for farmers, as well as recommended contacts to engage with regarding farmers' legal requirements as an employer.

B+LNZ collaborates with many partner organisations to extend our reach and make a greater impact. We will work with our extensive list of partnering organisations in this space to continue to develop the tool so that it is as practical as possible for farmers.

The wider project will see the creation of a supporting farmer network made from B+LNZ's Farmer Council members across the country who have a special interest in the area.

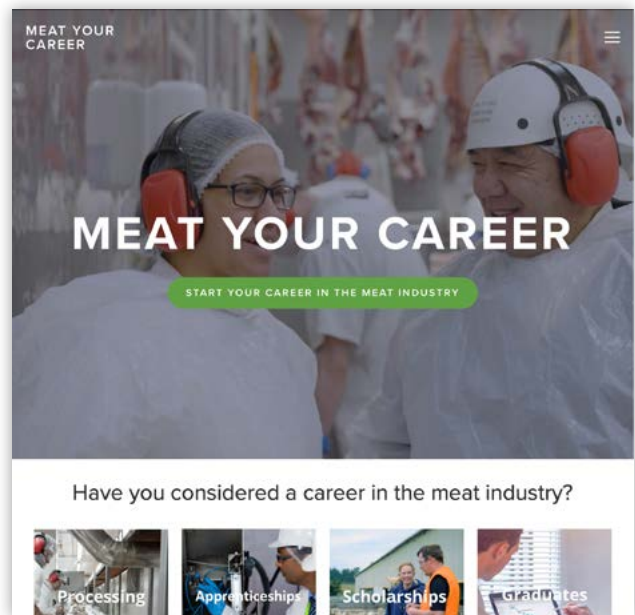
B+LNZ SIGNED FUNDING AGREEMENT WITH GROWING FUTURE FARMERS

B+LNZ has signed a funding agreement with the Growing Future Farmers (GFF) Essential Farm Skills Programme, to help attract and train more young people in the red meat sector.

The GFF Programme offers a range of specialised industry training and development opportunities across the country including formal New Zealand Qualifications Authority (NZQA) qualifications.

The agreement will give enrolled learners a boost of \$500 each in 2021. GFF will also receive a cash injection of \$25,000 towards running the programme.

Learn more on our website here: beeflambnz.com/news-views/more-youth-funded-sheep-and-beef-careers



MEAT YOUR CAREER

In August, New Zealand's meat processing and exporting sector launched a campaign to help address the industry's chronic shortage of employees.

The "Meat your career" website meatyourcareer.co.nz aims to highlight the wide range of opportunities available in the sector and shift the historic perceptions of what working in the industry is like.

The website includes videos featuring people working in the industry talking about their roles, a description of the types of positions available and guidance on remuneration. The recruitment drive is underpinned by a social media campaign targeting potential employees and making them aware of the opportunities in the sector.

The industry is about 2,000 workers short and this results in reduced production and robs New Zealand of important export revenue.

The campaign is focused on letting Kiwis know our innovative and progressive sector is at the cutting-edge of food manufacturing. Our people are world leaders in producing and exporting quality and nutritious food to more than 100 markets across the globe. We offer a range of exciting roles, competitive salaries, strong career pathways and an incredibly diverse workforce.

There are roles in the industry for those without any formal qualifications or experience as well as for those who have completed training or tertiary and post-graduate study.



ANIMAL WELFARE

We have graduates working in many areas of the industry including sales and marketing, international trade, communications, IT, new product development and food science. There are strong career paths to enable graduates to progress from entry level to more senior and management roles.

There are also many opportunities in processing for people of different ages, stages of life and levels of experience – from school leavers to those looking for a career change or a return to the workplace.

MIA and B+LNZ continues to play an active role with MPI and others in the sector to ensure that New Zealand maintains its reputation for very high animal welfare standards.

COVID-19 protocols have been updated to ensure that when we are operating under alert level 3 or 4 animal welfare implications are minimised, and particularly that stock are processed in a timely manner.

The MPI-led Farm to Processor Animal Welfare Forum (of which MIA and B+LNZ are active members) meets regularly throughout the year taking a proactive role in animal welfare issues and is continually revising its work programme to ensure that all relevant animal welfare concerns are addressed. The following are currently highlighted on the work programme;

- Heat stress
- Winter grazing
- End of life solutions for Dairy animals

BOBBY CALVES

Enhancing bobby calf welfare has been a collaborative industry wide initiative for more than a decade, with the goal of ensuring that the welfare of bobby calves is safeguarded during transportation and lairage prior to slaughter.

Despite operating during alert level 4 and 3 for a significant part of the bobby calf season, processors managed to process calves in sufficient numbers, ensuring that the vast majority of calves were processed without incident. The expectation is that similar numbers will be processed in the current 2021 season to those processed in the 2020 season, with a very low mortality rate of 0.4%. This is a similar result to 2019, and consolidates the gains made in previous seasons, noting that the mortality rate in 2008 was 0.66%.

Since 2016, the implementation of the new animal welfare regulations provided an increased focus on fitness of calves for transport, safe loading and unloading facilities, safe transport, including shelter and hours of transport, and time off feed before slaughter which helped consolidate the gains in bobby calf mortality.

This continued improvement represents an excellent result and again reflects the combined efforts and commitment of all involved.

Red Meat Report



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