TRUSTED, LEAN AND LONG-GAME

100 years of New Zealand Meat Exports to North America

Celebrating a Century of Innovation, Resilience and Market Partnership (1926–2026)

Written by Ali Spencer and Mick Calder

A trade relationship that has spanned a century is an achievement to celebrate. Our success in North America is built on our reputation as a reliable, consistent and trusted trading partner that provides the products the US wants. We look forward to another 100 years of providing top quality red meat to North American consumers.

FAST FACTS

New Zealand red meat exports to North America:
Over $NZ3.8 billion (US$2.1 billion).

US – Export revenue to New Zealand over NZ$3.2 billion (US$1.8 billion)

- **US Beef TRQ:** 213,402 tonnes (product weight) tariff-rate quota; current in-quota additional tariff of 10 percent, plus MFN tariff US4.4c/kg (about NZ7.7c/kg).
- **US Lamb:** As of May 2026, additional tariff 10 percent, plus MFN tariff US0.7c/kg (NZ1.3c/kg).

Canada – Worth over NZ$644 million (CA$513 million).
Under the CPTPP, full tariff liberalisation.

New Zealand's disease-free status and strong regulatory systems underpin its reputation as a trusted supplier.

Certification: Paperless and e-certification delivers significant efficiency gains.

Co-products: Tallow, blood products, and meat and bone-meal are in strong demand.

TIMELINE

1922
Establishment of the New Zealand Meat Producers Board

1926
First experimental shipments focused on developing the North American market

1930
Smoot-Hawley Tariff Act raises barriers to the US market

1939-1954
Bulk purchase agreements with the UK dominate trade; North America remains a secondary market

1953
Post-war re-opening of trade

1958
The ‘Hamburger Connection’ begins, first cartoned beef shipments; US fast-food expansion drives demand for New Zealand manufacturing beef

1964
US introduces the Meat Import Law (counter-cyclical quotas)

1970s
Containerisation replaces breakbulk shipping

1971
First fully refrigerated container ship arrives in New Zealand

1978-1980
The ‘Hygiene Crisis’; US delistings force massive upgrade of New Zealand processing plants

1980s
Rise of the chilled lamb trade via vacuum packing technology

1994
GATT Uruguay Round concludes; VRAs replaced by secure Tariff Rate Quotas (TRQ)

1999-2001
Lamb Safeguard Action

2003
BSE (Mad Cow Disease) in United States temporarily disrupts markets but highlights New Zealand’s disease-free status

2008
Strategic diversification for New Zealand, NZ-China FTA signed

2019-2024
New Zealand invests in modern branding, assurance and digitisation

2019
Launch of ‘Taste Pure Nature’ brand strategy in US

2020
Covid-19 pandemic tests supply chain resilience

2025
Strong quota utilisation

2026
Centenary of the North American trade

Introduction

In 2026, New Zealand marks a century since its first coordinated meat shipments to North America – an exploratory initiative of the newly established New Zealand Meat Producers Board, that became one of the red meat sector's most strategically significant long-term market developments. What began as small experimental consignments of frozen carcasses evolved into a sophisticated, high-value trade spanning beef and veal, lamb and mutton in frozen and chilled formats.

Over the past 100 years, New Zealand's meat trade has navigated economic upheavals, technology shifts, food safety revolutions, tariff wars and major geopolitical disruptions. Yet the sector has consistently adapted. Today, New Zealand is regarded across the United States and Canada as a trusted, reliable supplier of lean, grass-fed, high integrity red meat, underpinned by stringent food safety systems and a reputation for delivering what it promises.

This article traces that journey – how a young industry, focused almost entirely on the UK in the 1920s, built a deeply collaborative set of relationships with North American processors, government officials, customers and producer groups, and helped shape global meat trade rules that endure today.

Contents

Sheepmeat carcases displayed in the early 20th century. Source: Alexander Turnbull Library

1920s–1940s

Laying the foundations

In the early 1920s, the United Kingdom (UK) was still New Zealand's primary market for agricultural exports. However, the combination of New Zealand's normal production, plus the remaining inventory of frozen meat in New Zealand and other supplying countries from the World War I effort, collided with shipping constraints and increasing domestic production in the UK and Europe. That led to an oversupplied UK. The New Zealand Parliament's response was the 1922 creation of the New Zealand Meat Producers Board (the Board), tasked with coordinating shipments and stabilising export returns.

Seeking diversification and recognising that North America provided potential alternative export markets to the UK, the Board arranged trial shipments of frozen sheepmeat and beef, whole sheep and lamb and half beef carcases to the US and Canada in 1926.

At that time, consignments were shipped in muslin or hessian bags to both the west and east coasts of the continent in refrigerated bulk cargo – "breakbulk" – steamships, that were transitioning rapidly to running on oil. Manual loading and unloading was laborious, slow and subject to strong unions for dock workers. Key west coast ports reached directly across the Pacific were San Francisco and Vancouver. Shipments to the east coast took 35-45 days and arrived via the Panama Canal in New York and Boston for the US, and Halifax and Montreal for Canada.

Compared to exports to the UK of 2,930,517 hundredweight or 'cwt' (equivalent to nearly 149,000 metric tonnes), initial volumes of exported meat to North America were tiny in 1925/26 – 292 cwt (14 tonnes) to the US and 261 cwt (13 tonnes) to Canada. By 1928/29, they had grown to 248,625 cwt (nearly 9,000 tonnes) and 27,055 cwt (1,100 tonnes) respectively. Reported prices were favourable, the annual reports noted, validating the Board's view that North America offered genuine potential.

However, the optimism was short-lived. The 1930 Smoot–Hawley Tariff Act in the US increased the tariff rates by 20 percentage points to around 58 percent to protect American farmers. There was also a similar Canadian tariff increase, which effectively shut the North American door on New Zealand meat. Other countries reacted by introducing countervailing tariffs, further disrupting trade patterns to the extent that the British Commonwealth met at the Ottawa Conference in 1932 and established the Commonwealth Preference system. For New Zealand, this meant tariff-free entry for sheepmeat into the UK and introduced an initial 10 percent tariff on beef but also involved export documentation and continued lobbying of the UK on export levels for the next 70 years. This realigned New Zealand's focus on the UK.

A brief window into North America opened in 1938 with a reduced Canadian meat tariff, prompting the Board to ship 9,000 carcases of lamb and mutton – an initiative cut short by the outbreak of World War II in 1939, after which New Zealand was contracted to supply all its sheepmeat and beef exports to the UK under Bulk Purchase arrangements.

1950s–1960s

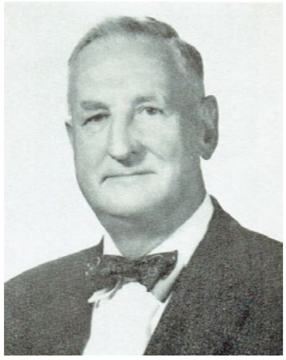
Post War re-entry and the rise of cartoned beef

The Bulk Purchase arrangements with the UK continued until the end of 1953, limiting New Zealand's diversification options, and was replaced by a 15-year supply agreement. But it enabled global meat markets to reopen and the Board began re-establishing North American links, with 50,000 lamb carcases sent to Canada in 1953 and the restart of business with the US.

A key turning point came with the shift away from half and quarter frozen carcases of beef to cartoned beef. In 1958, New Zealand began shipping 80-pound (36 kg) cartons of boneless and bone-in cuts, primarily beef. These were heavy, however, and port workers at the time used hooks to move cartons, which damaged the meat. Cartons were later standardised to the 60-pound (27.2 kg) cartons for safe handling and quality protection that continue to be used today.

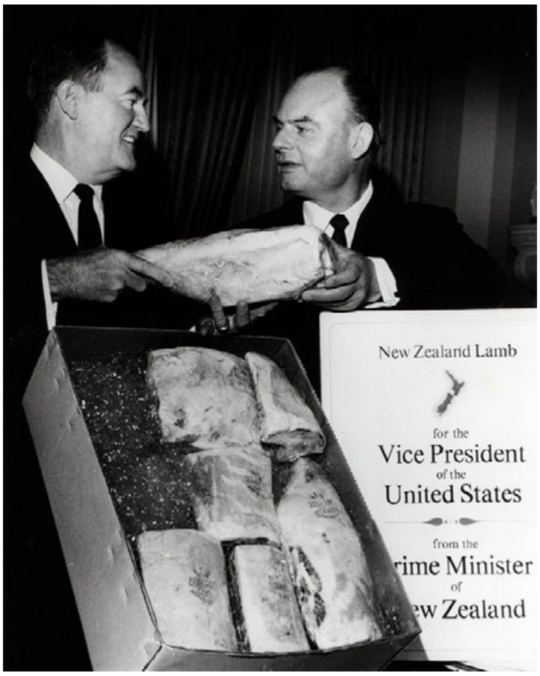
The first shipment, sent on board the Papanui, met strict US inspection requirements, with 99.5 percent of the shipment passing inspection. This outperformed competitors, coincided with rapid fast-food business expansion in the US and laid the foundation for a significant lean beef ingredients trade. New Zealand beef was to become an important component in the hamburger trade.

The New Zealand meat companies continued to develop the beef trade to North America but were reluctant to establish consistent supply programmes to open the US and Canadian lamb markets, because they had established practices and relationships in the UK. However, the Board was convinced of the need to diversify lamb sales to markets other than the UK. For North America, it had the Meat Export Control Act amended and in 1960 moved to establish the Meat Export Development Company (Devco) – a dedicated single-seller with most meat companies encouraged to become shareholders – based in New Zealand to export lamb to the US/Canada under an exclusive export licence. The Meat Board provided funding for advertising and promotional programmes for lamb, including radio/TV commercials, point-of-sale material and recipe development.



Alec O'Shea, the Board's first North American director (1964-1968). Source: "Golden Jubilee".

As beef volumes grew, the Board opened a New York office to be near the commercial hub of the meat trade in 1964. This was led by its first North American director Alec O'Shea, to monitor regulatory change and support market development.



New Zealand's ambassador to the United States, George Laking (right), hands a leg of prime New Zealand lamb to US Vice-President Hubert Humphrey in 1966.

With imports growing, US domestic industries grew uneasy. The US Meat Import Act 1964 formalised import quotas and trigger mechanisms plus introducing a voluntary restraint agreement (VRA). The Wholesome Meat and Poultry Act 1967–68 required imports to meet stringent US Department of Agriculture (USDA) hygiene rules, which were mirrored by Canada. New Zealand's, and other importing countries', plants that did not meet the new standards led to delisting by the US. That drove significant, often costly, upgrades in New Zealand processing plants. These were ultimately vital, not only for maintaining access to the US but also other markets around the globe.

Lamb exports grew more slowly. Early lamb sold frozen via supermarkets had performed poorly with US consumers unfamiliar with thaw-before-cook preparation. In response, the Board, Meat Industry Research Institute of NZ (MIRINZ) and processors developed the technique of ageing and conditioning in the 1970s – further improved in the 1980s by accelerated conditioning and ageing (AC&A) – alongside New Zealand-driven research focused on developing products that met US customers' needs. This was another step in innovation by the industry and an early example of New Zealand's willingness to innovate to meet market expectations for product consistency.

1970s–1980s

Innovation, containerisation and the expansion of trade

The 1970s brought transformational changes in logistics. The arrival of the first dedicated container ship, Columbus New Zealand, in New Zealand on 19 June 1971, enabled faster, safer, and more efficient refrigerated shipments. Cartons could be loaded into containers at the meatworks, which reduced time. In under a decade, containerisation became standard practice, improving product consistency and reducing costs. It also meant products could be transhipped in containers by rail or road across North America as required.

The North American trade grew rapidly during this period, especially for beef. In the mid-1970s, MIRINZ found New Zealand beef had 60 percent lower fat than American product, a higher proportion of which was unsaturated too. So, in 1981 the Board's US market services director Mike Muirhead encouraged Auburn University researcher Dr Dale Huffman to try hamburger patty formulations using New Zealand beef, which taste panels subsequently rated highly. As a result, Burger King and McDonald's – today two of the largest fast-food businesses in the world – were among those deciding to use New Zealand beef on their USA menus.

By the mid-1980s, the US had become New Zealand's largest beef market, primarily for lean beef blended with US beef from feedlot cattle to produce ground beef used in hamburger patties. It still plays an important role in the US beef supply chain today. Over 85 percent of New Zealand's beef exports to North America now are lean beef for the ingredients business, helping American producers to meet strong American consumer demand for ground products.

Lamb exports also strengthened following market diversification initiatives introduced by the Board and, after an extensive review in 1986, opened the market up to other New Zealand meat exporters, as well as Devco (later renamed the New Zealand Lamb Company). The latter was placing more emphasis on vacuum-packed consumer ready cuts by that time.

Throughout this period, trade relations continued to be shaped by American domestic politics. Quota volatility, VRAs and counter-cyclical import controls were recurrent features. The US 1979 Meat Import Act formalised tariff-rate quotas (TRQs) combined with counter-cyclical measures to adjust supplies and, significantly, assigned quota management to New Zealand and specifically the Meat Board – an enduring responsibility.

The US industry sought to limit lamb imports through a series of trade remedies during the 1980s. These included countervailing duties (CVDs), which aimed to counterbalance the "harmful" effects of New Zealand's subsidies on US sheep producers as determined by the US International Trade Commission (US ITC).

Sample of national newspaper advertising for New Zealand lamb, 1973.

Ed Farrell, a Washington lawyer specialising in international trade, acted for the Board at that time and later, in successfully challenging the CVD and anti-dumping cases filed by producer organisations with the US ITC. They showed that lamb imports caused no "reasonable indication of injury" to the US industry.

Lobbying in the US was aided by international trade law specialist, Ed Farrell.

New Zealand's government removed the subsidies on primary production in 1985 which resolved some of the CVD problems.

However, NZ-US relations deteriorated that year over New Zealand's nuclear-free policies and the US threatened to withdraw the country's previously negotiated Most Favoured Nation status. Following complaints from US sheep producers, it also again imposed short-term import duties of US18 cents per lb (NZ36 cents), citing 'material injury' from New Zealand's subsidies, even though they had already been abolished.

Despite these challenges, New Zealand continued to foster constructive relationships with US producer groups. Participation in the International Beef Alliance (IBA) – first established in 1976 as the Four Nations Beef Alliance by New Zealand, US, Canada and Australia – helped build trust and provided important channels for resolving trade tensions. Later known as the Five Nations Beef Alliance, once Mexico joined in 1993 after the North American Free Trade Agreement (NAFTA) was implemented, it was then re-named to IBA when Brazil and Paraguay were added in 2015. Following the dissolution of the IBA in 2023, New Zealand producer groups have worked closely with US and Canadian counterparts on key issues such as animal welfare, sustainability and trade through organisations such as the Global Roundtable for Sustainable Beef.

With the meat companies taking up more of the commercial activity, the Board's US activities became increasingly focused on trade policy. For that reason, it was decided to move the Board's office from New York to be nearer to US decision-makers in Washington DC.

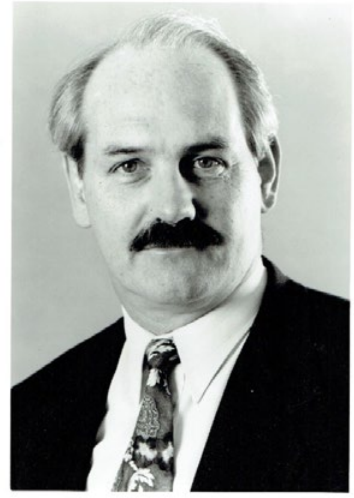
Cartoning lamb racks for export to North America at Takapau plant, Hawke's Bay Farmers Meat Company Hawke's Bay, in 1983. Devco developed its "Spring Lamb" logo, with "spring" to emphasise that the lamb met US requirements and in two languages to cover the Canadian specifications.

1990s

Modern trade rules and a strategic pivot

The 1990s reshaped global agriculture. The 1994 GATT Uruguay Round finally brought agricultural products under comprehensive multilateral trade rules, converted non-tariff trade barriers into tariffs and strengthened dispute settlement through the newly formed World Trade Organization (WTO). This was a watershed moment for New Zealand, opening the way for more transparent and predictable market access.

For the US, it ended VRAs and access reallocation between suppliers. For New Zealand, the beef country-specific TRQ (CSTRQ) was agreed at 213,402 tonnes (product weight) with an in-quota tariff rate of US4.4 cents per kg – and that still applies today.



Laurie Bryant, North American director from 1989 to 1995 left quite a mark in the continent's meat trade. He went on to become the executive director of the Meat Importers Council of America (MICA), a post he held until his retirement in 2020. Bryant was inducted into the North American Meat Industry Hall of Fame that same year.

The Board's North American director Laurie Bryant (1989-1995) at the time felt a significant development was the establishment of the Beef Checkoff in 1986 funded by a levy paid by both US producers and importers to improve generic demand for beef. One programme under the checkoff he believed had contributed to demand growth was the development of new beef cuts such as the flat iron steak. This gave the foodservice sector more economical options and improved the presentation of beef in the retail meat case.

Lamb continued to face its own hurdles. A 1999 US safeguard action on lamb restricted trade through the introduction of increased tariffs and CSTRQs prompting a WTO challenge from New Zealand and Australia. This was successful and the safeguard measures were removed in 2001. This also ultimately paved the way for the establishment of the Tri-Lamb Group – a collaborative effort between US, New Zealand and Australian producer bodies to grow total category demand. The group later became the Global Sheepmeat Forum, with the addition of British and Canadian interests.

During this period, New Zealand's new Meat Board Act split the Board's activity in two in 1998: with the statutory functions of export licensing and quota allocation and monitoring retained by the New Zealand Meat Board, and farmer-levy funded activities such as promotion, research and development and on-farm activities carried out by Meat NZ. For their part, New Zealand companies increasingly invested in in-market processing and distribution in North America, allowing them to respond more quickly to customer needs. Internet connectivity further enhanced collaboration and supply chain transparency.

2000s

Food safety, technology and high-value growth

Food safety vigilance became paramount in the 2000s. North America's bovine spongiform encephalopathy (BSE) cases in 2003 and 2015 triggered strict border measures and heightened scrutiny of all global suppliers. New Zealand's freedom from BSE and foot-and-mouth disease proved a major competitive advantage.

Responding to increasingly stringent US regulatory requirements, and working closely with New Zealand's government officials, New Zealand processors introduced enhanced *E. coli* detection protocols, highly visible blue plastic into the cartons – which would later be completely removed with 'naked blocks' taking over, strong contamination detection systems, improved cold chain practices and electronic export hygiene certification. These measures strengthened trust with North American importers and reinforced New Zealand's reputation for reliability.

Technological innovation accelerated. MIRINZ developments in AC&A, improved packaging, and later robotics and genetics, lifted product quality and consistency. Chilled lamb and beef began earning premium returns from the early 2000s, building on New Zealand's grass-fed differentiation.

Strong demand for New Zealand beef, because of US droughts and the Canadian BSE outbreak, led to the CSTRQ limiting New Zealand's exports to the US in 2001, 2003 and 2004 with product being held in bond at the end of the years for the following year. This not only demonstrated New Zealand's role as a complementary and valued supplier of quality lean beef for America's burgers, but also showed the quota was constraining trade, asserted Meat NZ's North American regional manager at the time, Andrew Burtt (1999-2006 and 2010-2012).

Andrew Burtt had two placements in the US as North American regional manager (1999-2006 and 2010-2012).

Canada — A parallel but distinct partnership

Canada has long been an important, though smaller, market for New Zealand meat exports.

Early trade

Initial shipments began alongside US trials in the 1920s, with volumes reaching 1,117 tonnes by 1928/29 before tariff increases paused trade. A significant revival came in the 1950s, when following the suspension of Canada's exports to the US following an outbreak of FMD in the country, a three-way switch arrangement enabled New Zealand beef to enter the US market in exchange for Canada supplying beef to the UK.

Regulation and market structure

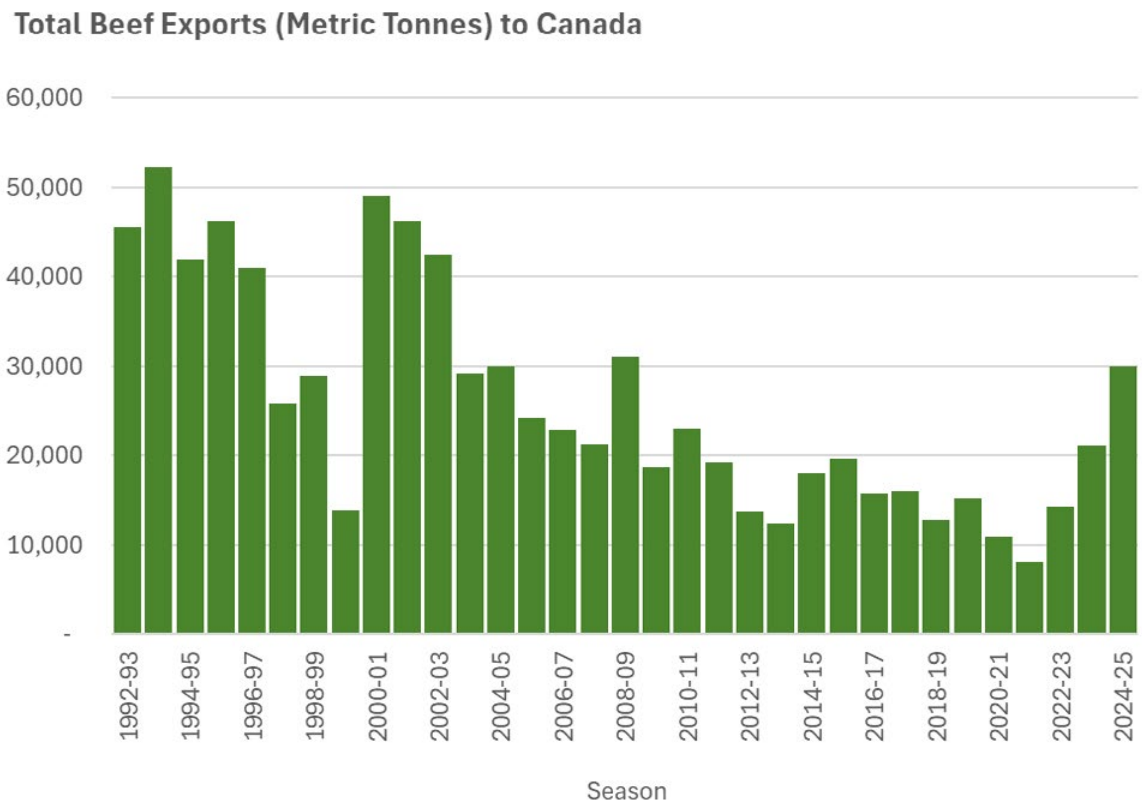
Canada's meat sector is tightly integrated with the US, with many processors sourcing fresh/chilled prime cuts across the border. Imports require strict compliance with the Canadian Food Inspection Agency (CFIA) framework, including: the Official Meat Inspection Certificates (OMIC); product-specific food safety and animal health attestations; and use of the National Import Service Centre and the Automated Import Reference System (AIRS) for clearance.

Canadian import policies historically included quotas and periodic protective measures similar to US arrangements.

Canada introduced a Beef Checkoff levy in 2002 and later the 2013 Levies Order, part of a framework that funds category marketing and research. This provided a stable, orderly market for New Zealand suppliers in which compliance, clarity and consistent quality were rewarded.

CPTPP and modern access

Under the CPTPP, signed by both New Zealand and Canada in 2018, Canada phased out tariffs and TRQs on New Zealand beef over six years, allowing unrestricted duty-free long-term access. Responding to strong Canadian demand, New Zealand's beef exports lifted to around 30,000 tonnes by the year ending September 2025.



Source: Beef + Lamb New Zealand Economic Service analysis from New Zealand Meat Board data

Women crowd the New Zealand Spring Lamb stand at the Canadian National Exhibition, to sample the freshly cooked product. Stands such as this one in Toronto were used to introduce New Zealand lamb to consumers, many of whom were tasting it for the first time.

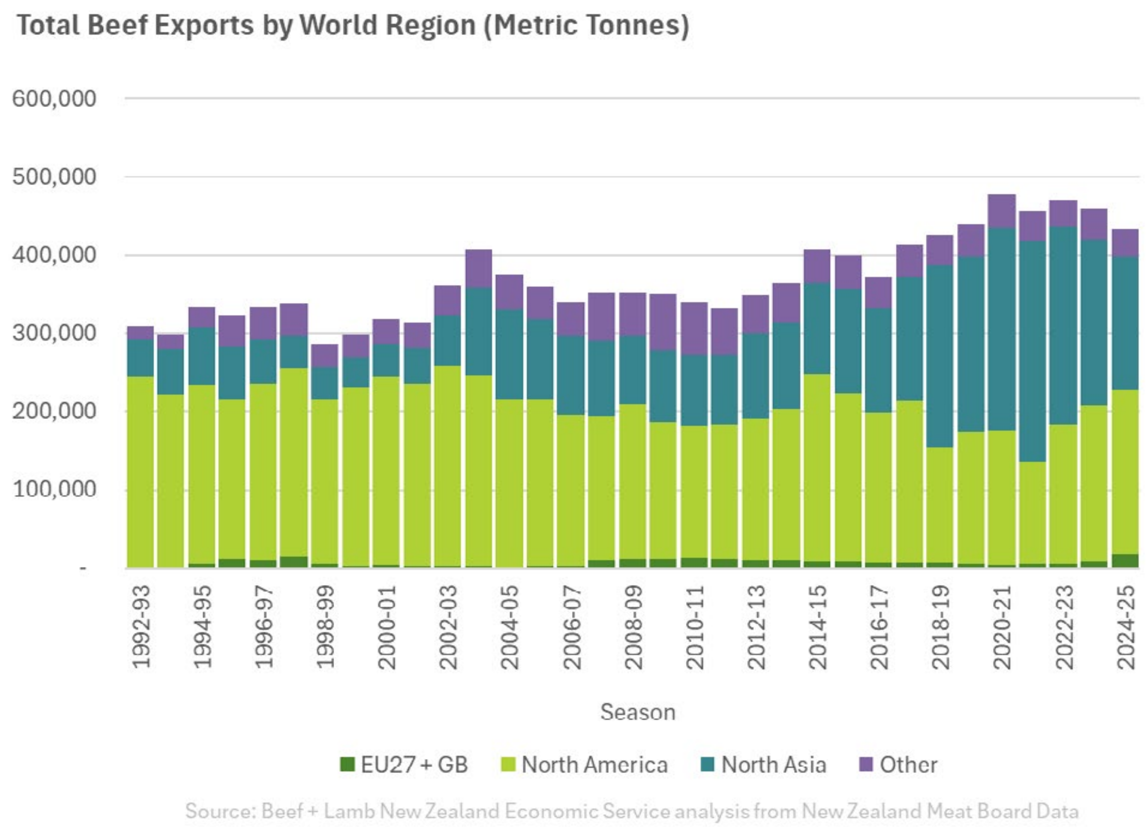
New Zealand farming leaders Mr B. Dryden of Waverley (right) and Mr T. McNab (second left) inspect one of several displays of New Zealand lamb in the giant Woodward's supermarket in Vancouver. Mr Dryden and Mr McNab were Chairman and Vice Chairman, respectively, of the Meat and Wool section of Federated Farmers. With them are Mr R. Plant, Western representative of the Meat Export Development Company (NZ) Ltd, and Mr R. Marshall, Meat Department Manager at the store.

2010s

Market dynamics, FTAs and shifting global demand

In the early 2010s, North America remained a core market, but global demand patterns were shifting. New Zealand negotiated free trade agreements (FTAs) with a wide range of trading partners. The most significant, the China–New Zealand FTA (2008), opened a rapidly expanding market that, by 2015, had become New Zealand's largest destination for sheepmeat and, by 2019, for beef. This diversification strengthened New Zealand's negotiating position globally – but also tightened supply for North American customers.

Reflecting these new market opportunities, US imports of New Zealand beef and veal reached 73 percent of the CSTRQ volume of 213,402 tonnes in 2010.



By 2020, a growing share of New Zealand's beef exports were heading to North Asia, particularly after the signing of the China FTA in 2008.

Still, the US remained strategically important. Tariff rates had gradually reduced over the 1990s in line with the WTO's Uruguay Round agreement. From 2000, New Zealand exporters were working with lower Most Favoured Nation import tariff rates of US4.4 cents per kg (about NZ 7.7 c/kg) for beef and veal, US0.7c per kg (about NZ1.3c/kg) for lamb and US2.8c/kg (about NZ5 c/kg), for mutton.

Meat NZ was renamed Beef + Lamb New Zealand (B+LNZ) in 2010, still fulfilling producer levy-funded activities.

Economic analyses by the B+LNZ Economic Service and MICA show that North America was a big market for New Zealand meat in that period. While the US was the biggest beef consumer in the world, imports from New Zealand were equivalent to only about a week's worth of US consumption and its lamb made up a relatively small share of total US lamb imports.

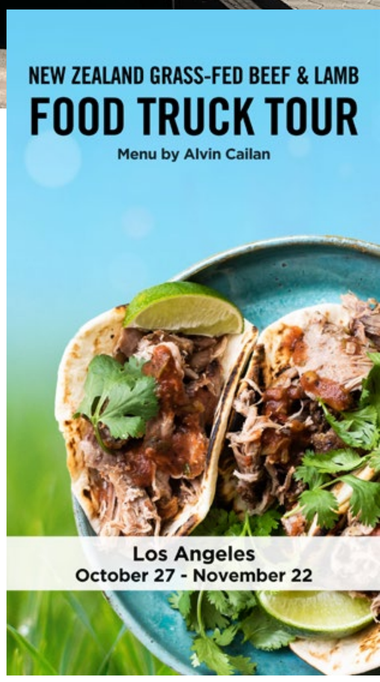
As Burtt commented, New Zealand was also selling a service of food safety, reliable delivery, reasonable price, trust and truth in labelling – providing the market with what was contracted – as distinct from just focusing on the physical product, a 27.2 kg frozen block of beef.

In 2010, the New Zealand government issued a challenge to all exporters, including its red meat sector, to double the value of exports by 2025. Having already increased productivity – producing the same amount of beef and lamb while sheep and beef cattle numbers had fallen – work intensified on adding value to the carcase and finding more high value uses for co-products.

New Zealand and Australia joined the Comprehensive and Progressive Trans-Pacific Partnership (CPTPP) in 2018, alongside Canada, Mexico and others. While the US withdrew from the earlier TPP framework, the CPTPP enhanced New Zealand's access into Japan, Canada and Mexico.

Marketing also evolved. Responding to consumer interest in natural, sustainable foods and the rise of alternative proteins, working closely with the meat processing companies B+LNZ launched the Taste Pure Nature (TPN) origin brand in 2019, targeting "Conscious Foodies" in California and New York with strong early success. The campaign complemented the New Zealand Farm Assurance Programme (NZFAP), which involved the meat companies and most sheep and beef producers. TPN highlighted New Zealand's grass-fed production systems, reinforced by NZFAP's traceability of animal welfare and food safety throughout the supply chain. NZFAP Plus, rolled out in 2021, added environment, biosecurity and people and culture to the base NZFAP standard.

The Taste Pure Nature food truck in Los Angeles



The Taste Pure Nature campaign launched online globally. New Yorkers learned about it from billboards like this one in Times Square.

2020–2025

Resilience in turbulent times

The Covid-19 pandemic brought unprecedented global disruption. New Zealand's coordinated, science-aligned response – and support from the government – ensured the red meat sector continued operating as an essential service. Closely coordinated actions by B+LNZ, the New Zealand Meat Board, the Meat Industry Association, companies and suppliers enabled meat plants to remain open under strict protocols. Similarly, farmers kept supplying livestock and exporters adapted quickly to working online and the volatile logistics environment.

Despite US drought-driven supply swings, New Zealand's long-established relationships helped maintain market continuity. As US drought conditions eased in 2023/24 and herd liquidation slowed, demand grew and New Zealand's exports rebounded, supported by the sector's reputation for food safety, reliability and high animal health status. That season, the US was one of New Zealand's highest value markets with exports worth $18.05 per kg FOB, compared to the average $9.67 per kg across all 109 markets.

In 2019, after 25 years working for the New Zealand Government on agricultural market access at the Embassy in Washington D.C, Jason joined B+LNZ as the Trade & Relationship Manager for North America. He is also currently serving on the U.S. Cattlemen's Beef Board as one of the importer representatives as well as chairing the Trade Committee for the Meat Import Council of America (MICA).

In 2024, an important development in trade infrastructure was achieved. The Meat Board worked with New Zealand and North American government officials to achieve full paperless export quota certification with the US, Canada and Mexico, streamlining trade and lowering compliance costs. The majority of shipments still go by sea via the Panama Canal, with voyages around five days shorter than the 1920s on average, with cartons packed into mainly 20-foot containers on board much larger refrigerated container ships. Smaller high-value quantities are also air-freighted when required.

The industry is now led by value, rather than production, as it was at the start of the century. While the majority of New Zealand beef is still demanded by North American manufacturers as a high specification lean ingredient, premium quality grass-fed cuts are also in demand from foodservice and high-end retail, where it joins New Zealand lamb in restaurants and on retail shelves.

North American customers are also increasingly seeking blood and other products for pharmaceutical use, meat and bone meal for the petfood industry, and tallow for biofuels, as well as for growing applications in cosmetics and cooking.

In April 2025, the long-standing, stable tariff settings that had benefitted both US customers and New Zealand companies were disrupted by the introduction of new 'reciprocal' tariffs. These tariffs sought to address the US' persistent global trade deficit and perceived unfair trading practices. Despite New Zealand's highly open-trade regime – its average applied tariff rate on US imports is just 0.3 percent – the US imposed an additional 10 percent tariff on New Zealand products, which later increased to 15 percent in August 2025. To curb rising food prices, the Trump administration removed these additional tariffs on selected agricultural products, including beef, in November. The additional tariffs on New Zealand lamb remained.

That year, imports of New Zealand beef into the US were equivalent to 90 percent of the CSTRQ, reflecting continued strong demand. Imports of New Zealand lamb into the US were similarly robust due to elevated levels of demand.

New Zealand exported over NZ$3.4 billion worth of red meat products to North America in the year ending December 2025. Co-product exports, including wool, added a further $440 million. Both represented an impressive testament to a century of partnership and resilience.

Conclusion: a century of partnership and progress

From the first muslin-wrapped carcases loaded onto breakbulk vessels to today's high-value chilled cuts shipped in digitally tracked consignments, the North American market has shaped – and been shaped by – New Zealand's red meat industry.

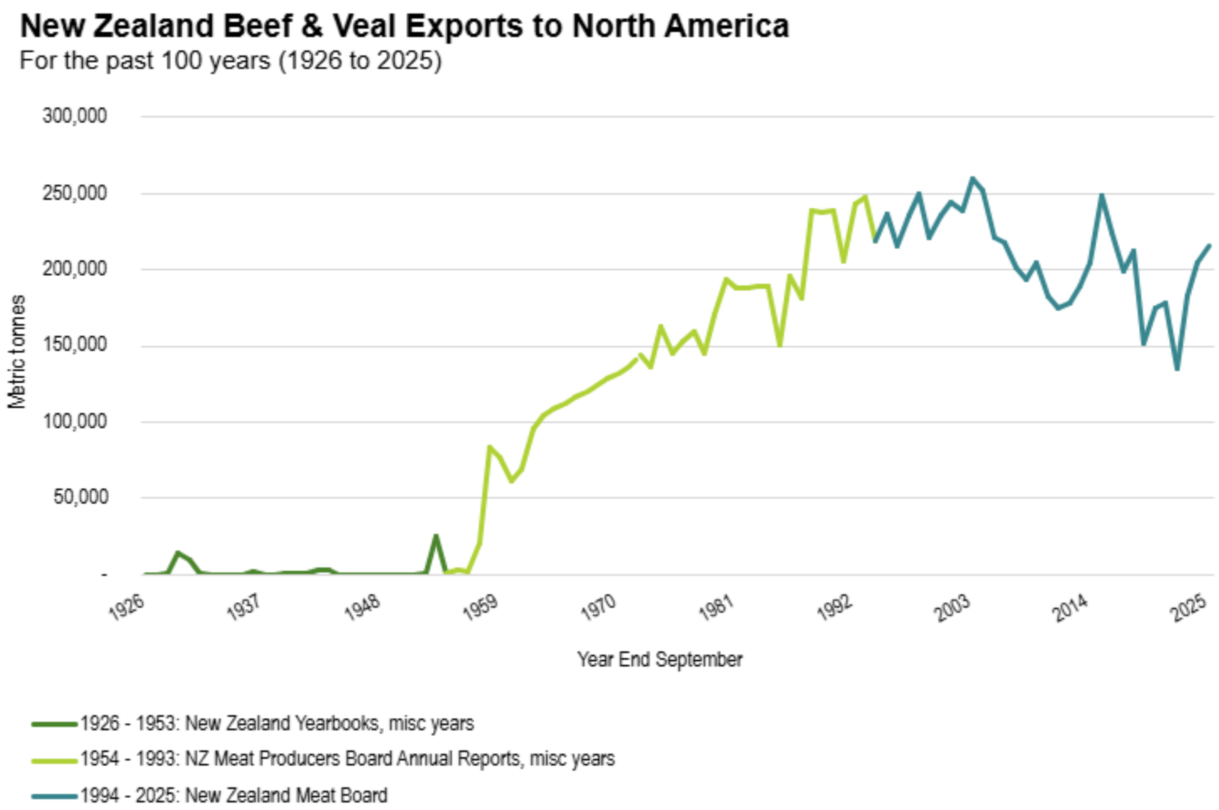
The century-long relationship has endured trade wars, pandemics, food safety revolutions and global political shifts. It has required consistent innovation, disciplined compliance and constructive diplomacy. Most of all, it has relied on stable commercial partnerships and a deeply embedded trust in the integrity of New Zealand and New Zealanders.

As New Zealand looks ahead, the US and Canada remain among its most valued trading partners, within its export mix of 110 markets. The North American markets recognise New Zealand for what it has spent 100 years demonstrating: quality, reliability, safety, integrity, and a willingness to adapt to market needs.

The lesson of 10 decades? Play the long game, invest in science, systems and story, co-operate where you can, contest where you must and always deliver. That is how New Zealand earned its place at the North American table – and why it is likely to keep it.

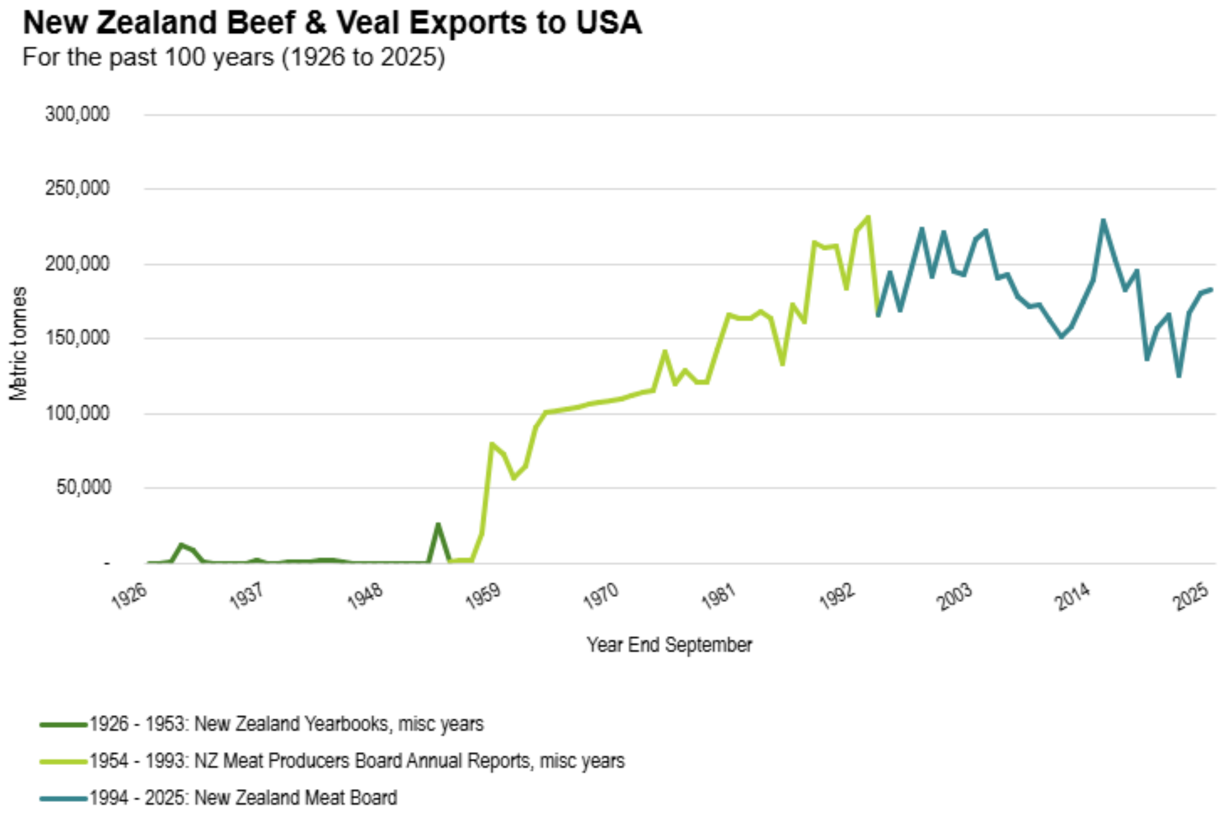
Appendix: 100 years of red meat exports in graphs

This appendix uses graphs to illustrate the development of New Zealand's red meat exports to North America over the last 100 years, highlighting the changes in export volumes, product mix, and market dynamics over time.

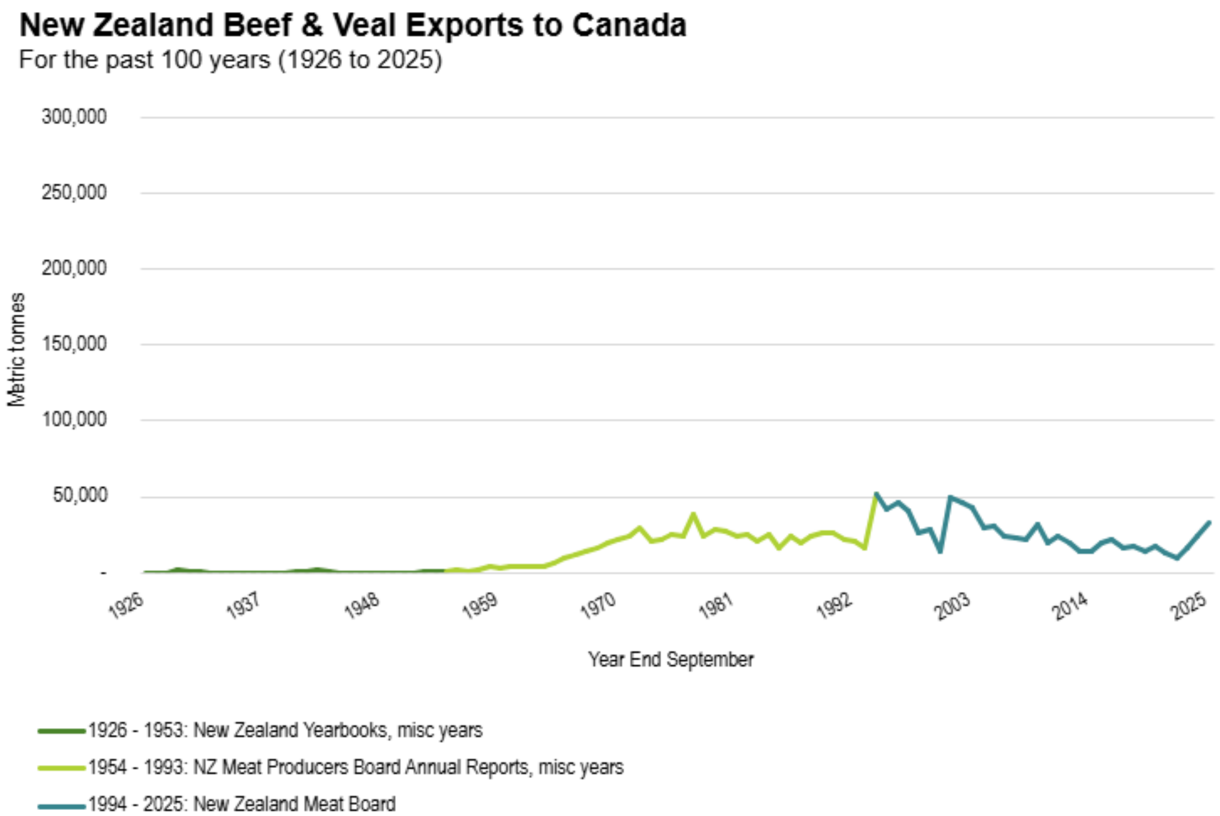


The vast majority of New Zealand's beef exports to North America over the past 33 years have been frozen. Volume has declined somewhat since the early 1990s as new markets have demanded the New Zealand product. *Source: B+LNZ Economic Service.*

Data for 1926–1953 represent total frozen meat exports to North America, rather than beef and veal exclusively. These figures are included for historical context, as export volumes during this period were relatively small. Beef and veal specific data starts from 1954. Where data were unavailable or uncertain, values were linearly interpolated between adjacent time points. These estimates may not capture short-term season variation.



New Zealand's beef exports to the US show a stable pattern, though current volumes fall short of the highs recorded in the early 2000s and again in 2014/15. In 2024/25, New Zealand's exports to the US were 81 percent of the 213,402-tonne tariff-rate quota. *Source: B+LNZ Economic Service.*



New Zealand's beef exports to Canada reached a low point in 2022/23 due to strong demand from other markets, particularly in North Asia. Exports have since risen gradually in response to strengthening Canadian demand. *Source: B+LNZ Economic Service.*

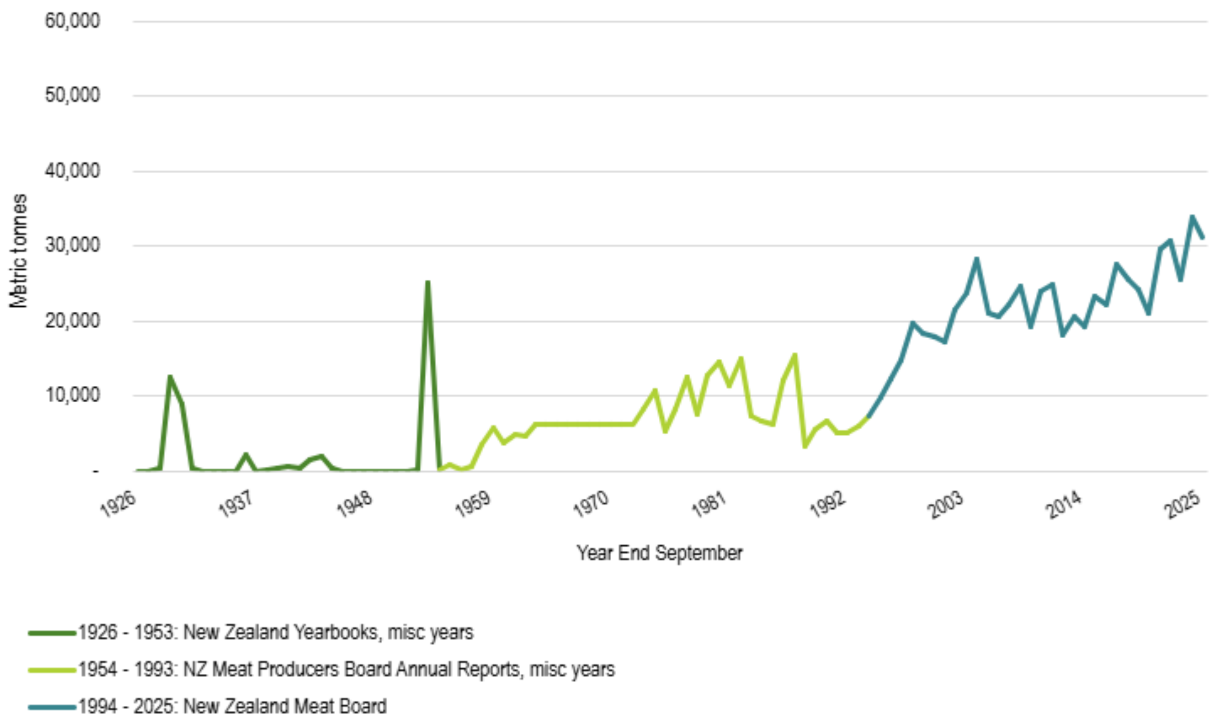
New Zealand Sheepmeat Exports to North America

For the past 100 years (1926 to 2025)

New Zealand's sheepmeat exports to North America represent a small proportional of total exports over the past 33 years, fluctuating from six percent to 15 percent. *Source: B+LNZ Economic Service.*

New Zealand Sheepmeat Exports to USA

For the past 100 years (1926 to 2025)



New Zealand's sheepmeat exports to the US are relatively small and stable, increasing gradually in line with rising US lamb consumption. This growth reflects efforts to expand the overall market rather than compete for market share. *Source: B+LNZ Economic Service.*

New Zealand's sheepmeat exports are minimal have but have grown in recent years, demonstrating emerging demand and the potential for further market development. *Source: B+LNZ Economic Service.*

beef+lamb new zealand

mia Meat Industry Association

NEW ZEALAND MEAT BOARD