



Agribusiness Agenda '23

Energising a World of Anxiety



Energising a world of anxiety



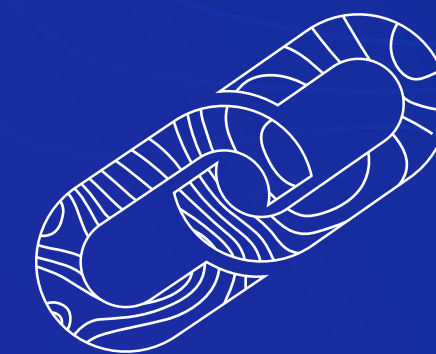
Stepping up innovation

There is no shortage of ambition across the industry to step into the future. People and organisations want to be able to plug into vibrant innovation systems, have certainty over the regulatory framework they face and have confidence that the necessary investment will be made into the infrastructure that will enable them to realise their ambitions.



Leading the unconverted

Leaders are leading the converted, but it is not clear they are leading everybody in the industry. Work is needed to engage many more people in the sector around the full extent of the opportunities available, connecting them to hope. There is also a need to attract and retain people who have passion for the sector and who want to play a role in realising its future potential.



Investing in defensible trust

The bar to achieve trusted status is not static. It is consistently rising. The industry's regulatory platform needs to be collaboratively designed with the people and organisations it regulates to deliver credible outcomes for our communities and markets. Trade practices must benefit more than just the exporter, while Generative AI means credible data must back every action.

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Ministerial foreword

Our food and fibre sector continues to power Aotearoa New Zealand's economy, as our top export earner – last year generating a record \$53.1 billion and is forecast to reach new heights in the coming years.

The sector has been vital in New Zealand's economic recovery as the world emerges from the COVID-19 pandemic, and this is down to the hard mahi of our farmers, growers, fishers, foresters and processors.

In reading the Agribusiness Agenda 2023, it's a refreshing approach to ask a younger cohort of leaders about their view of things.

Reflecting on the report an insightful Japanese quote on strategy comes to mind:

In strategy, it is important to see distant things as if they were close and to take a distanced view of close things.

A necessary focus of the Government in 2023 has been helping those affected by Cyclone Gabrielle and other extreme weather events. These events have highlighted how challenged rural New Zealand can be by a changing climate.

Correspondingly, I note that investing in resilient rural infrastructure has leapt up the priorities ranking among surveyed leaders.

In dealing with the immediate need, we have provided more than \$295 million towards a range of activities to help rural communities with immediate recovery needs. These include funding to support silt clean-up, aerial surveys, fencing, logistics for the health and wellbeing of communities, and animal welfare.

For many in the worst-affected regions, there is a long road ahead to recovery, and the Government remains committed to helping our rural communities to rebuild.

Long term resilience is critical as we make decisions on the recovery.

When it comes to seeing distant things close up, the work of emissions pricing comes to mind. It's been a topic of debate, some of which is characterised by short term thinking.

Every trip I take overseas as Trade Minister confirms that moving on agricultural emissions will position us ahead of the curve as expectations of our customers abroad change. The market signals continue to strengthen.

Being able to demonstrate our sustainability credentials to consumers is at the core of this Government's steady investments in our farmers and growers. This will be fundamental to our future competitive advantage.

It also dovetails with our approach to trade, which has delivered seven new or upgraded free trade agreements in the past

five years, including our historic deal with the United Kingdom, which just entered into force.

To that end, we continue to see good momentum in delivering the Government and sector roadmap Fit for a Better World, which was launched in 2020 to grow sector profits and returns, sustainability and jobs over 10 years.

We continue to make good progress through our new Centre for Climate Action on Agricultural Emissions. Since it was launched last year, we have announced more than \$37 million in funding through the Centre alongside the sector to bring down agricultural emissions. These investments will help deliver new tools and technologies to farmers to help produce products with strong environmental credentials, so New Zealand can continue to compete on the world stage.

More broadly, the Government and sector are investing heavily to diversify production,



boost exports, and lift value through sustainability. For example, to date the Ministry for Primary Industries (MPI) and the sector have co-invested \$555 million in 255 projects through the Sustainable Food and Fibre Futures fund.

The annual KPMG Agribusiness Agenda survey has consistently listed biosecurity as the number one priority for over a decade. We've invested in protecting our precious biodiversity and our economy by continuously improving our world-class biosecurity system.

We remain on track to eradicate *Mycoplasma bovis* as we look to move to the next phase of the ten year programme that we've completed five years of.

When foot and mouth disease hit Indonesia last year, we urgently stepped up our biosecurity controls. This included stopping travellers from bringing in personal consignments of any meat product, as well as disinfection measures at the border. We have also introduced a dedicated biosecurity lane for travellers.

Through Budget 2023, the Government committed to building a new state of the art Plant Health and Environment Laboratory to help strengthen our

world-class biosecurity system. The new laboratory will help our plant-based sectors, including horticulture, arable and forestry sectors, to boost their export success.

At the grass roots level, we are working to develop our workforce and the knowledge to lift our sustainability credentials. MPI's new On Farm Support team of 40-plus advisors is available to help farmers and growers gain access to integrated farm planning support and advice to deliver plans that are relevant to their production models and where they're situated in the country.

Our Opportunity Grows Here attraction campaign continues to connect people with jobs, and we are investing in a number of initiatives to interest students in pursuing a sector career.

In delivering on our goal to restore waterways within a generation, more than 220 catchment groups across the country are helping to improve land management practices. We have invested more than \$37 million into catchment groups in the last three years. These groups are supporting thousands of farmers, helping them access expertise and tools to improve their environmental and economic sustainability and wellbeing.

There are leaders, and then there is leadership. As Agriculture Minister, what I ask of our leaders is that they have the courage to make tough decisions that are informed by those at the grass roots, but influenced by long-term views of the changing world we live in.

KPMG's Agribusiness Agenda provides useful insights from industry leaders to help guide our way along this important path.

The foundations we have built together have helped enable our food and fibre sector to flourish, bounce back from shocks, and ensure it continues to power New Zealand's economy and prosperity.



Hon. Damien O'Connor

Minister of Agriculture; Biosecurity; Land Information; Rural Communities; and Trade and Export Growth.



Editorial

Energising a World of Anxiety

Energising a World of Anxiety

A colleague recently attended a conference in Auckland and reported that a delegate stood up towards the end of the day and commented that he had never been at an event where he had heard such relentless negativity. That feeling of negativity about what comes next was not as persuasive during our roundtable conversations with industry leaders and influencers, but it did permeate each of our discussions as concerns were expressed about the speed of change, climate disruptions, costs of operation, and new (and in some cases unconfirmed) regulations amongst other issues.

Having listened to the conversations, which took place around the end of March, and reflected on them for some months, it was clear to me that the leaders that took part believe that there is significant anxiety about what the future holds across the sector and concern about whether the sector and their organisations have the resources, capabilities, and skills ready to respond to what lies ahead. This concern has also shown itself in the priorities survey, which has seen the overall priority score increase by over 3%, suggesting leaders recognise that with the challenges they see coming, there is an increasing need to accelerate the pace with which key issues facing the sector are being addressed.

Contrasting the views of current and emerging leaders

That said, we have done things differently this year to prepare the 2023 KPMG Agribusiness Agenda. In addition to talking

with and surveying current leaders and influencers, we also asked some of the younger members of our team to bring together a cohort of emerging leaders in a forum session to think about what needs to be done now to shape the sector and organisations that they are likely to be leading in 15 years' time. We held our emerging leader's forum in early May and surveyed them simultaneously. Their realistic optimism about the sector's future provided a refreshing balance to the views we had heard from sector leaders. While they recognised the challenges that face the sector, particularly in attracting and retaining people, they saw a future based on collaboration, respect for the knowledge that Māori can bring to the table and a strong commitment to accelerating the development and uptake of innovation across the sector.

The framing for the roundtables and the emerging leader's forum differed. For the roundtables, we recognised the success that the sector has had in continuous

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evolution over decades but suggested a point of inflexion had been reached where the historical rate of change is no longer sufficient to allow the sector to respond to climate change, digitalisation, and the other macro shifts occurring around the world. Against a background that the sector will have to do more faster just to stand still, we talked with sector leaders about their top-of-mind issues, the things keeping them busy on a day-to-day basis.



With the emerging leader's we talked about similar issues but immediately orientated the forum towards the future to provide a canvas that can be shaped by the actions we prioritise to take advantage of the opportunities available in a global food system that is entering a period of significant transformation. While conversations with both groups centred on changes that need to be accelerated, we intentionally gave emerging leaders the ability to think beyond the day-to-day. That energised the discussions and made it easier to see the opportunities inherent in the challenges that current leaders are dealing with daily.

The opportunities in food and fibre exist and are recognised by all. The ability to capture them will depend on whether we view the future as constrained by the present or an opportunity for us to design the outcomes we seek as individuals, organisations, communities, and a country. The energy that will come from a belief that we can design our future will enable us to accelerate the pace of change. Actions are clearly connected to opportunities we can grasp rather than being another burden thrown out by the day-to-day challenges the world serves up.

Moving beyond the binary to flourish in the grey

With the extent of change that the sector faces, it was not surprising that leaders believed that people are looking for specific, actionable advice about the steps they should take to enhance business resilience and build a platform for future growth. The certainty of a clear set of actions reduces anxiety and enables organisations to focus on what comes next for their business. However, it was raised in several conversations that the desire for clear guidance has often forced the sector to take black-and-white positions on issues. The best example of this has been our approach to biotechnologies which has been binary, we either use the technologies or we don't. In contrast, many countries have found ways to take blended positions and comfortably exist in the grey.

Our expectation that something is right or wrong, used or ignored, is likely contributing to the anxiousness across the industry. The point was made that it is rare for the optimal outcome to exist at one extreme or the other of a spectrum of possible outcomes. It is far more likely that outcomes will be optimised by breaking

from our desire for binary simplicity and accepting that living in the grey provides a more comprehensive range of possible outcomes. The optimal position for an individual or organisation may vary depending on the other drivers in their business. Going back to biotechnology, an exporter of horticulture products may optimise their export returns by maintaining

a strong genetic technology-free position. Simultaneously, the forestry sector may seek to adopt some aspects of gene editing to reduce the risk arising from wilding pines or slash over time. Our challenge is that a blended, grey position that could generate better environmental and economic outcomes is not available to us at the current time.

One contributor asked why New Zealanders seem to find it harder to live in the grey than people in other countries. In past Agendas, we have called for mature conversations on controversial issues to enable us to move into the grey; however, in most cases, the industry has continued to avoid the difficult discussions. Our sector is not a large player in the global food and fibre system, and because of initiatives like Te Hono, there are now many connections between people and organisations. It should be easy to have these difficult conversations; however, it seems easier not to discuss than to take an opposing view to a friend or colleague. Finding ways to thrive in the grey is a critical building block to unlocking and energising the sector's future.

Leadership through action

During one of the roundtable conversations, the comment was made that New Zealand needs to rediscover its ambition; we need to talk a bigger game than seeking to excel at mediocrity. The suggestion was made that leaders need to be more focused on providing hope about what the future holds than spending time focused on the day-to-day issues that drain energy and contribute to uncertainty. While this

contribution stood out for its very direct message, the need for leaders to lead the whole sector and not just those on the same page (as them) was a recurring theme during all our conversations.

The emerging leaders shared some very interesting perspectives on how they see leadership working in the future. While the view that you might be past it by age 55 was a bit confronting for somebody that is already on the wrong side of 50, the core of their message was that leadership comes not from age, title, or what is already on your CV but through the actions you are taking now and the energy that you are putting into the work you do. While there was recognition that it has been a challenging year to be an industry leader, there was a clear message that not enough has been done to engage all in the sector with the scale of the opportunity available but also the actions that must be taken to bring it to life.

For the foreseeable future, leading the sector will be an even more active pursuit than in the past. Leadership will come from those people that stand up and act. Leadership at the grassroots will be as important as that exercised from the boardrooms. However, it is critical that those leading are heading in the same



Communicating a pathway towards better now rather than taking years to announce the perfect solution, complete with answers to every frequently asked question, is critical to providing hope and energising people to act.

direction and looking to move forward at similar speeds to avoid confusion, reduce anxiety about the future, and bring energy through the successes individual actions create.

Articulating our understanding of pathways forward

Despite all the current concerns and anxiety across the sector, many contributors were quick to point to the positive, innovative, and exciting developments that are happening. The range of the projects that the government is co-investing in through the Sustainable Food and Fibre Futures Fund provides a snapshot of just some of the work being done to create solutions that will assist in responding to challenges and unlocking potential. However, it was

unclear how many people understood the extent of this work.

While industry leaders recognise the need for change and are starting to get a clearer picture of what change might look like, this understanding is not widely shared across the industry. Contributors suggested that uncertainty around the pathways for change is a significant factor in anxiety. Concerns were raised that rather than share this information as we understand it today, leaders tend to keep quiet until they have the 'perfect' solution. The point was made that communicating a pathway towards better now rather than taking years to announce the perfect solution, complete with answers to every frequently asked question, is critical to providing hope and energising people to act. Providing good solutions, which acknowledge future uncertainties but offer confidence that any investment to be made will most likely be part of future solutions, will move everybody forward and help lift the confidence that the opportunities in front of us can be realised.

Learning from the resilience of the past

More than one contributor referred to challenges the sector had faced in the



past, with reference often being made to the upheaval of the 1980s when the government withdrew subsidies from farmers. While few in leadership roles today led the sector through those challenges, many remember their impacts on their parents, their communities, and their friends during that period. One contributor noted that the resilience shown across the industry at that time has seen a phoenix grow out of the ashes to become the \$50 billion-plus export industry

we know today that creates wealth that benefits all New Zealanders.

The solutions to subsidy-free farming were not immediately apparent in the mid 80's, just as the solutions to decarbonising the sector, regenerating natural ecosystems, and automating production systems to respond to labour shortages are not yet clear today. However, the industry and its leaders found ways through the challenges by collaborating, investing in innovation,

and growing entirely new export sectors, for instance, wine and kiwifruit. They backed themselves to find solutions and created an industry that has set the bar as a global leader in innovation in food and fibre for decades (and remains so). While not all the answers to the challenges in front of us are apparent today, the exponential pace technology is developing should provide confidence that answers can be found. Recognising the resilience those leaders of the past showed when faced with big questions and the results they created should energise the sector for the journey ahead and what it is possible to achieve.

Motivating through feeding the five million

In recent years the Agenda has been unequivocal that the sector has a critical role to play in reducing the levels of food inequity that we currently experience in New Zealand. The reasons for this are simple, it is not only the right thing to do, but it addresses a significant risk to the story we tell the world about the sustainable, healthy attributes of the food we grow. It is pleasing to see that more leaders recognise that this is a critical element of the sector's social license to operate in their responses to the priority

survey and are looking to find ways to play their part (although there remains much to be done).

I regularly argue that there is no more honourable role than growing food for people. However, when this purpose gets consumed in the anxiety and argument surrounding change, it can be easy to forget the bigger picture and lose the energy that fulfilling such a critical role can and should give to an individual's mana. As one contributor noted, we can often lose focus on the social impact of the food system in all the noise about the challenges. Increasing the focus on the nutritional security that the sector delivers to society will assist in building stronger bridges to the broader community. However, it will also reconnect people across the industry to their fundamental purpose, growing food for people to eat, and assist us in unlocking new business models that ensure that our food system does feed the five million first.

Never forget that the future is not set in stone

We learnt in March 2020 that what we believe to be our certain future can suddenly be transformed by events that

are outside of our control. While the pandemic lockdowns were not the future that most of us were looking forward to, the experiences that we had lived through during that period when the world stopped did highlight that the future does not exist, meaning we do have the power to shape our own futures by the actions that we choose to take today.

We have written in past Agenda's that we believe that the food and fibre sector in New Zealand must be inherently orientated to the future rather than being focused on the present. We should be challenging ourselves to envision futures that draw on innovation, both existent and potential, to paint bold pictures of what the industry could be in 10, 20 or 100 years. Future scenarios should not always be comfortable, but they should cause people to stop, think and ask questions. They should connect what we are doing today to the future we aspire towards and energise people across the industry as they work through the immediate changes we need to make. The question was raised as to whether we have been bold enough in articulating the industry's future and if there was ever a time to be bold, it is now.

The emerging leader's cohort appeared to thrive in uncertainty and ambiguity as they

were encouraged to consider what the future could deliver for New Zealand's food and fibre sectors.

The opportunity today for all in the industry that choose to lead, not just those with the job titles but also those who lead through their actions in their communities and through their passion for their organisations, is to connect everyone in the sector to an understanding of what the future could be for New Zealand's food and fibre industry. I believe that the more we can provide clarity around the extent of opportunity sitting in front of us, the more we will energise the world of anxiety in which we currently find ourselves.



Ian Proudfoot

National Industry Leader - Agri-Food
Global Head of Agribusiness
KPMG , New Zealand

Introducing the Emerging Leaders Forum

This year, we've done something a little different with the KPMG Agribusiness Agenda. Previously we've focused on gaining an understanding of current industry leaders' thinking, but this year, we've also sought out the perspectives of individuals in the industry who are likely to be in leadership roles in the next 10 to 20 years - our emerging sector leaders. Current industry leaders nominated these individuals and come from all facets of the sector. In early May, we hosted a forum specifically to capture their perspectives.

Three of our emerging leaders from the KPMG Propagate™ team, Brigitte Ravera, Lincoln Roper and Ella Beatty, facilitated an afternoon workshop to explore what needs to be done to ensure that a

sustainable, vibrant, and growing sector will be passed on to the next generation. Over the course of the forum, the cohort of nearly 60 emerging leaders participated in an afternoon of challenging dialogue on the sector's future centred around the Agenda's three key themes (leadership, embedding trust, and innovation and creativity) that had emerged from the current leader roundtable sessions.

We began the afternoon by giving our emerging leaders a 'crash course' in reframing their minds to a 'future-focused mindset'. Using tools and exercises specifically designed to push participants to think outside the box, we hoped to get the creativity flowing.

We explored our key themes using several tools from the Institute for the Future (IFTF), who KPMG partnered with to deliver future food and fibre foresight workshops in recent years, as well as introducing our own challenging external perspectives. IFTF's frameworks enabled participants

“Any useful statement about the future should at first seem ridiculous”

Jim Dator



to think systematically and logically, using the signals and trends we see in our world today to imagine a plausible future.

Interspersed across the afternoon were external perspectives provided by our forum's 'disruptors', who joined us both virtually and in person. They were tasked with provoking our emerging leaders to

challenge whether the assumptions we may consider as fact are indeed truly unassailable. As one emerging leader summarised, "Sometimes we have these constraints in our mind that mean that we think we can't solve these problems, but any fact can be flipped, and when you do that, you often solve the problem"

Our disruptors

- UK-based **Alice Ritchie**, Nature & Forests Manager and WWF Partnership Lead for Tesco, spoke to our cohort about consumers of today and the future and their expectations and challenges, particularly with respect to sustainability. She also challenged the group to consider how New Zealand products are perceived in overseas markets, particularly the UK.
- NZ farmer **Mike Casey**, who we case studied in the 2022 KPMG Agribusiness Agenda, shared insight into Forest Lodge Orchard and NZ Zero's journey to build the first certified New Zealand fossil fuel-free orchard. He discussed current challenges, constraints, solutions, and exciting next steps for NZ Zero.
- **Sarah Nolet**, co-founder and Managing Director of Tenacious Ventures, spoke to the cohort about her organisation – a specialist agrifood tech venture capital firm investing at the intersection of food system transformation and climate solutions. She talked about the exciting start-up companies her firm has invested in and where Tenacious Ventures play in the innovation ecosystem.

- We were also lucky to have the support of our three in-person disruptors, **Lee-Ann Marsh**, CEO of AGMARDT; **Emma Wheeler**, COO of Trust Codes and **Andrew Watene**, Head of KPMG Propagate™. Our in-person disruptors acted as facilitators, journeying alongside each theme to support the emerging leaders in the exercises and challenging them to push the boat out further.

Building out a roadmap for the future

The starting point for imagining these futures was to present deliberately extreme and provocative statements and begin exploring the consequences these changes could have on the future. Ultimately the emerging leaders built on these provocative statements to describe what an ambitious future for each of the key themes would look like. The final step was to create roadmaps with actions for the sector to achieve these futures. These are described later in the Agenda under each theme; innovation, leadership and trust.

A hand holding soil against a background of topographic map lines. The hand is positioned on the right side of the frame, with fingers curled around a mound of dark, rich soil. The background is a dark blue gradient with white, wavy contour lines representing a topographic map. The overall mood is one of earthiness and environmental focus.

State of the nation

2023 Priorities Survey Results



State of the nation

In framing the discussion for the 2023 leaders' roundtables, we talked about the food and fibre sector rapidly reaching (and potentially moving past) a point of inflexion regarding the speed with which it needs to change to respond to the expectations of its various stakeholders.

We acknowledged that the sector has consistently changed, improving its practices and enhancing outcomes over the decades. Still, we suggested that with climate change, geopolitical shifts, unwinding globalisation, changes in consumer preferences, new economic paradigms, and differing employment expectations, amongst many other factors, the time for evolutionary changes had passed. We now needed more radical, transformational change. The suggestion was that step changes are required to enable the industry to stay relevant,

competitive, compliant, and attractive to its many stakeholders.

Heading into the first roundtable, we weren't clear how this message would resonate with the leaders and influencers joining us in the Zoom room. We suggested that more and faster change is needed against a period of dramatic changes having already arisen from the pandemic, climatic shocks, supply chain disruption, labour shortages and massive economic volatility.

We had more leaders participate in roundtables this year than ever before and broad agreement that the industry has no choice but to respond to the challenges (which, whenever possible, should be reframed as opportunities) in front of it with bold and ambitious strategies. However, we also heard consistently that while the leaders broadly acknowledge the case for change in rooms like our roundtables, the case for accelerating change must be understood and accepted

More and faster change is needed against a period of dramatic changes having already arisen from the pandemic, climatic shocks, supply chain disruption, labour shortages and massive economic volatility

across the industry. It was highlighted that many farmers, growers, and producers are disconnected from the bigger picture and instead focused on finding solutions to squeezed margins and labour shortages and responding to whichever climate event (drought, flood, cyclone) has been served up to their region. Consequently, the discussion centred not on the need for change but on the ability and desire of the sector to change and, as explored in the editorial, the ability of leaders to lead change.

That said, the leaders and influencers that completed KPMG’s annual Agribusiness Agenda Priorities Survey gave a clear signal that they are motivated towards action, with average priority scores up overall for all demographics apart from Generation X (who gave back a small portion of the increase that they recorded last year against the overall trend of declining priority scores). The increases in scores for Millennial contributors (a growing segment of the survey population) and Baby Boomer contributors (a shrinking part of the survey population) are significant. They indicate a desire for faster action amongst those taking on new leadership roles and, potentially, more concern about cementing the legacy passed on by those coming to the end of their leadership or governance career.

This year we added a new demographic identifier to the survey, asking participants whether their predominant role in the sector was executive management or governance. We explore the differences in priorities between executives and governors later in this section of The Agenda; however, it is worth noting that the average priority score for those in an executive role was 7.41, compared to 7.10 for those with predominant governance roles. This suggests that the drivers for change should be recognised or understood more clearly in the boardroom, if the industry is to respond to the challenges effectively.

Average score given to a priority	Overall	Male	Female	Millennial	Gen X	Boomer
Average Priority Score '22	7.07	6.91	7.37	6.22	7.30	6.87
Average Priority Score '23	7.29	7.11	7.52	7.22	7.22	7.45
Movement	0.22	0.20	0.15	1.00	(0.08)	0.58

The 14th KPMG Agribusiness Agenda Priorities Survey

We again surveyed industry leaders and influencers to understand their assessment of the priorities for the organisations they are involved in within the food and fibre sector. The survey asked leaders to give each of the 42 priority statements a score out of 10, with ten indicating that the item is a critical priority to them. We added two new priority statements and removed five that had been included in the survey last year. The wording of several statements was edited to ensure they remained relevant to current industry developments. Those completing the survey were asked to provide demographic data (gender, generation, and predominant role), enabling us to understand differences in priority ratings between these groups. We received 105 valid responses to the leaders survey. As a separate exercise, we also surveyed the Emerging Leaders Cohort and received 56 valid responses.



105

Leaders survey respondents



56

Emerging Leaders



The 2023 Top 10 priorities

While there is no change to the top priorities this year – world-class biosecurity and signing high-quality trade agreements remain ranked at 1 and 2 (with higher scores in 2023) – the rest of this year’s Top 10 looks very different. We have four new entries that have moved up at least nine and as many as 28 places in the rankings. Three priorities that have held their position in the Top 10 have fallen in the rankings, and one has climbed from ninth to finish third overall (enhanced immigration settings).

The new priorities in the Top 10 reflect key themes raised during our roundtable conversations. The need for ‘Careful and objective assessment of tree planting programmes’, particularly plantations with the primary purpose of permanent carbon sequestration, was the highest of the new

entries (coming in at fourth equal with ‘Broadband equality for all), with a priority score up 22% on the prior year. This was one of the priorities where the wording was modified on the 2022 survey, where we changed the language from ‘Supervise large scale tree planting programmes’ to critique such programmes. Climate change's immediate and longer-term impacts on the sector were a key theme during the roundtable conversations. The key focus being on the innovation required to provide equitable pathways for all in the industry. We explore this theme in detail on page 37 of the report.

The need to discuss gene editing has been a background issue in The Agenda for the last few years. Concerns have grown that failing to have the debate puts the industry at risk of irreversibly falling behind competitors. The issue, however, has only now made its debut in the Top 10. We made a small change to the wording of the priority, changing the focus from initiating a conversation on the use of gene editing to instead focusing on acting

on the conclusions of a discussion. We made this change as we consider there is already a substantive, although informal, conversation underway on gene editing and other biotechnologies due to growing frustration that the politicians have been unwilling to lean into this debate.

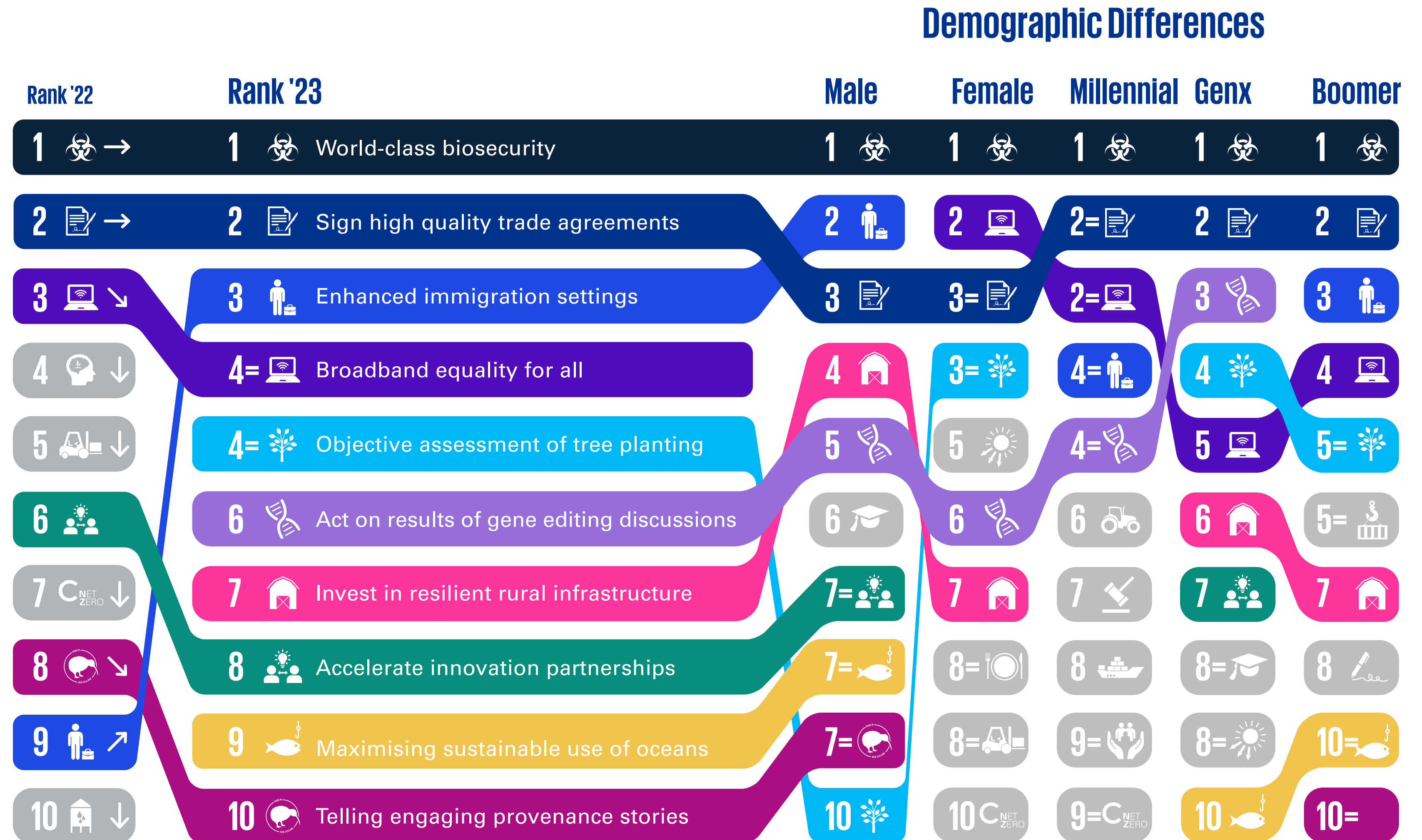
The other new entries into the Top 10 relate to accelerating investment in rural infrastructure and maximising the sustainable use of the oceans. The vulnerabilities of rural infrastructure have been blatantly apparent this year, with several leaders noting the challenges they faced contacting their people in the days following Cyclone Gabrielle. Recognition of the need to eliminate digital inequity has been and continues to be a Top 10 priority; however, concerns around the resilience of the electricity system and the deterioration of roading infrastructure have increased in the last two years. With the need to embed climate resilience into the industry and our rural communities, this has become an increasingly urgent priority for leaders in 2023.

Top 10 priorities 2023

Biosecurity retains the top ranking

Once again, the need for world-class biosecurity is the highest priority for industry leaders, but after a relatively benign year in respect of incursions, the issue did not feature prominently in discussions. Although foot and mouth disease has advanced in Asia Pacific, with an outbreak occurring in Indonesia, biosecurity was only raised during two roundtables. The point was made that as the impacts of climate change increase, we must recognise that extreme weather events and new temperature norms create conditions for pests and diseases to arrive and become established across the country.

Recognising biosecurity as the highest priority suggests leaders understand the risks; however, we need to be careful not to pay lip service to the threat but take practical steps to ensure we are prepared and ready to respond when an incursion



occurs. The strain that recent weather events have placed on civil defence systems was highlighted, as was the importance of the informal community army in responding to such emergencies. The question was posed whether we have a match fit on standby army ready to respond, with the need to be clear on their role should we experience a biosecurity incursion.

More or better free trade agreements?

Last year we noted that our leaders' conversations hardly mentioned markets and consumers, with most issues raised focused on domestic matters. There

Some contributors expressed a view that there is a better opportunity for us to grow trade through refreshing existing agreements to ensure we maintain preferential access and minimise informal non-tariff barriers rather than seeking new agreements.

was significantly more discussion on trade this year, with the subject being raised in each roundtable. Much of the discussion revolved around the changing nature of international trade and concerns that we are over-exposed to the Chinese market. Concerns were also expressed around the new ways trading partners are introducing constraints on free trade, for instance, through the implementation of behind-the-border non-tariff barriers, including measures such as potential cross border adjustment mechanisms to impose carbon taxes on imported products with higher footprints than local equivalents. While the new FTAs signed with the UK and EU are welcomed, the point was made that the new agreements are unlikely to make a big difference for many sectors. Some contributors expressed a view that there is a better opportunity for us to grow trade through refreshing existing agreements to ensure we maintain preferential access and minimise informal non-tariff barriers rather than seeking new agreements.

Top 10 priorities and score

Rank '23	Rank '22	Action	Priority '23	Priority '22
 1	1	World-class biosecurity	9.06	8.76
 2	2	Sign high quality trade agreements	8.42	8.14
 3	9	Enhanced immigration settings	8.13	7.67
 4=	3	Broadband equality for all	8.06	8.13
 4=	=32	Objective assessment of tree planting	8.06	6.58
 6	21	Act on results of gene editing discussions	8.03	7.14
 7	23	Invest in resilient rural infrastructure	8.00	7.09
 8	6	Accelerate innovation partnerships	7.79	7.92
 9	18	Maximising sustainable use of oceans	7.75	7.31
 10	8	Telling engaging provenance stories	7.74	7.71

Going down – priorities falling out of the Top 10

With four new priorities in the Top 10, the obvious question is, what are the priorities that have been replaced, and are there any indications from the roundtables as to why these priorities have seen industry leaders score them lower in 2023? It should be noted, that these priorities have not plummeted down the rankings, but now occupy four of the places between priority 11 and 16.

We have seen leaders express how their people priorities have changed over the last couple of years as the response to the pandemic has fundamentally altered the labour availability assumptions, on which the industry has built its business models. This year the focus on attracting people into industry careers, which will assist in filling the long-term people pipeline (which was fourth-ranked priority last year), has been replaced with a stronger focus on getting immigration settings right so that organisations can address their immediate labour issues. This has seen the priority

related to enhancing immigration settings rise from ninth to third in this year’s survey. There was plenty of discussion around a range of people issues during the roundtables, covering issues from the urgent need for automation of manual, repetitive tasks through the current settings in the education system to what needs to be done to enhance the sector’s ability to retain the people that it recruits. These discussions are explored further from page 55.

There was less discussion this year around supply chain resilience, which has fallen by seven places to rank 12th. While issues continue to exist with supply chains, the impression from our discussions is that they have become, by necessity, business as usual, and companies have developed procedures to handle the disruptions they face daily. While there has been some easing in supply chain costs, many contributors pointed to the other increases in costs that they are working through. It was noted that these increases often run well ahead of the headline inflation numbers and require organisations to make some difficult choices, particularly as commodity pricing comes off the peaks experienced in recent years.

Given the extensive discussions over climate, it was surprising to see the priority to collaborate to accelerate the transition towards net zero declining by six places to 13th. Many contributors highlighted that decarbonising the economy can only be done successfully through collaboration.

Priorities that have fallen out of the Top 10

	Rank '23	Rank '22	Priority '23	Priority '22
 Co-ordinated promotion of sector careers	11	4	7.74	7.96
 Develop resilient supply chains	12	5	7.69	7.95
 Collaborate to accelerate net zero transition	13	7	7.67	7.90
 Build water storage to manage water resources	16	10	7.61	7.61



The Centre for Climate Action Joint Venture announced between MPI and a group of commercial partners to co-invest [\$174 million] into technologies that could potentially deliver carbon reduction solutions to producers was called out several times. However, the issues that arose with the He Waka Eka Noa partnership, when the government selected only some elements of the partnership deal rather than adopt the complete package of measures that had been negotiated, were highlighted in several conversations as a setback to trust. It has left a question mark for organisations about who they choose

to partner with and the time they invest in the partnerships.

Why are we not talking about water resilience?

There is no water-related priority in the Top 10 this year. Leaders are just not talking about water and water resilience. We categorise each comment in the notes taken during the roundtable conversations to its key topic – this year, only 0.1% of the notes were tagged to water as their key topic. Given that nothing grows without water and the significant benefits of

water resilience to industry and broader community, the lack of discussion around water infrastructure is hard to understand, particularly given that the disruptions that climate change is bringing to our traditional weather patterns.

Through improved storage and distribution systems, water resilience will give producers and value chain partners the confidence to invest in new and emerging technologies. Enhanced water storage also has the potential to contribute towards the generation of green energy and support the development of underutilised, particularly Māori land. One of the few contributors that talked about water suggested that there is a huge prize to society in getting water right.

There are potentially several reasons why industry leaders are not talking about water resilience.

- Firstly, getting any water storage and distribution system consented has become so convoluted with a remote likelihood of success that many leaders choose to spend their time on more productive activities.
- Secondly, these long-term water projects have benefits that are only likely to be fully realised by the next generation.

The reality is that water resilience can't keep fluctuating in and out of the Top 10 priorities of industry leaders, as reliable water supplies are a core part of the platform on which our ability to generate export income is built.











As we discussed in last year's Agenda, the industry is currently not geared toward making intergenerational investments despite benefiting significantly from investments made by previous generations.

With climate change fundamentally changing how and when rain falls from the sky, we need to implement the strategic responses required to ensure we capture sufficient water so it is available when we need it to meet both economic and community requirements. The reality is that water resilience can't keep fluctuating in and out of the Top 10 priorities of industry leaders, as reliable water supplies are a core part of the platform on which our ability to generate export income is built. As one contributor put it, how can we future-proof our food and fibre sectors if we are not prepared to do the work now to future-proof our water resources?

Demographic differences

Last year three priorities featured in the Top 10's of each demographic cohort. This year there are only two – world-class biosecurity and high-quality trade agreements (which interestingly were not in the Top 10s of all cohorts last year).

Since we started performing the demographic analysis, male contributors have produced the Top 10 that is closest to the overall result each year, and they have done so again this year with only one differing priority. This is not surprising as the survey population is still male-dominated, although this dominance is reducing; this year, 57% of contributors were male compared to 64% last year. Their Top 10 prioritised the coordinated promotion of sector careers rather than broadband equality for all, which they prioritised 11th. Given earlier comments about the greater focus on

Rank '23	Action	Male	Female	Millennial	Gen X	Boomer
 1	World-class biosecurity	1	1	1	1	1
 2	Sign high quality trade agreements	3	3=	2=	2	2
 3	Enhanced immigration settings	2	19=	4=	11	3
 4=	Broadband equality for all	11	2	12	5	4
 4=	Objective assessment of tree planting	10	3=	13=	4	5=
 6	Act on results of gene editing discussions	5	6	4=	3	14=
 7	Invest in resilient rural infrastructure	4	7	15	6	7
 8	Accelerate innovation partnerships	7=	12=	23=	7	15
 9	Maximising sustainable use of oceans	7=	15	20=	10	10=
 10	Telling engaging provenance stories	7=	16	28=	12	10=

Higher priority
(10+ above overall)

Higher priority
(5 to 9 above overall)

Higher priority
(Within 4 above overall)

Consistent
priority rank

Lower priority
(Within 4 below overall)

















Lower priority
(5 to 9 below overall)

Lower priority
(10+ below overall)

short-term rather than long-term labour solutions (which also comes through in the male cohort result, with enhanced immigration settings being ranked second), it was surprising that coordinated career promotion remained in the male cohort's Top 10. Digging into the results for this priority further, it has been given a significantly lower priority score by the other cohorts, with female and Baby Boomer cohorts ranking it 17th and the Millennials 25th (although our emerging leaders saw this priority very differently).

Another constant of the cohort Top 10s has been that our Millennial contributors, who remain the smallest cohort but growing year on year, produce the most differentiated Top 10, with only four of the overall Top 10 making their ranking this year (compared to five out of 10 last year). As a cohort, they place lower importance on telling engaging provenance stories (which they rank a lowly 28th equal), accelerating innovation partnerships with customers, making sustainable use of the oceans, investing in resilient rural infrastructure, and the objective assessment of tree planting programmes and broadband equity.

They are the only cohort not to include the priorities relating to resilient rural

			Demographic Rank '23	Priority Score '23	Overall Rank	Overall Score
Male Contributors	 Co-ordinated promotion of sector careers		6	7.70	11	7.74
	 Transition to climate resilient systems		5	8.23	17	7.61
Female Contributors	 Develop resilient supply chains		8=	8.05	12	7.69
	 Quickly work to reduce food insecurity in NZ		8=	8.05	15	7.62
	 Collaborate to accelerate net zero transition		10	8.02	13	7.67
	 Quickly work to reduce food insecurity in NZ		2=	8.50	15	7.62
Millennial Contributors	 Supporting land owners to change land use		6	8.07	21	7.43
	 Tougher penalties for animal welfare breaches		7	8.00	19	7.48
	 Manage export exposure to China		8	7.85	25	7.14
	 Collaborate to accelerate net zero transition		9=	7.79	13	7.67
	 Increase protection of migrant workers		9=	7.79	18	7.59
Gen X Contributors	 Transition to climate resilient systems		8=	7.89	17	7.61
	 Co-ordinated promotion of sector careers		8=	7.89	11	7.74
Baby Boomer Contributors	 Develop resilient supply chains		5=	8.07	12	7.69
	 Negotiate and complete an FTA with India		8	8.00	23	7.31
	 Increase protection of migrant workers		9	7.89	18	7.59



infrastructure and tree planting in their Top 10. However, this does not mean that they ignored climate-connected priorities. The inclusion of supporting landowners to change land use at six and collaborating to accelerate net zero transition at nine highlights that climate challenges are very much at the centre of their thinking. However, they have a greater belief that we should continue to focus on finding collaborative solutions to the climate challenges in front of us.

However, the most dramatic difference in their Top 10 was the ranking of quickly working to reduce food insecurity in New Zealand as the second priority of the Millennial cohort. This is the highest ranking this priority has ever received in the survey and reflects the growing recognition that the industry will not be able to call itself a success if it fails to play its role in feeding our five million first (as we have argued for consistently in each Agenda since 2019). This priority received an overall ranking of 15 in this year's survey, which is also its highest overall rank (up from 20 last year and 27 in 2021). It is pleasing to see this being increasingly reflected in the priorities and actions of the sector's leaders (with the female cohort also ranking the priority in their Top 10).

Initiatives like Meat the Need, the New Zealand Food Innovation Network, The Aotearoa Circle's Mana Kai and others are mainstreaming the discussion around the critical role that a food-secure society plays in the sector's future.

The Millennial cohort was the only cohort to give Top 10 rankings to tougher penalties for animal welfare breaches and managing export exposure to China. The animal welfare priority continues to drift down the overall rankings, potentially reflecting the fact that we have had fewer stories in the mainstream media in recent years about animal welfare failures. Animal welfare, however, is one of the most important issues to the community and the consumer, and we need to be careful that it does not become an out of sight, out of mind issue. It is strategically important to the sector's future (the changes in bobby calf rules being introduced reflect this), meaning it needs to be actively managed rather than being left as a compliance exercise and a cost to be controlled.

The female cohort delivered a more diverse Top 10 this year than in recent years, with four priorities that did not feature in the overall Top 10. The notable difference in their ranking was the significantly lower priority placed on enhanced immigration settings, which the female cohort ranked at 19th - significantly lower than any of the other cohorts. The other notable difference in

the female Top 10 is the overriding priority that is being placed on climate change and decarbonisation – the cohort ranking includes four priorities that are specifically connected to climate change, including one of the new priorities included in this year’s survey (transition to climate-resilient systems, which is discussed below) and collaborate to accelerate net zero transition. The strong focus of female

contributors on climate was also reflected in the roundtable conversations and is significantly more pronounced this year than it has been in the past.

As is common, the Generation X cohort generally does not deliver a Top 10 dramatically different from the overall result (reflecting that this cohort accounts for 58% of contributors). However, It is interesting to note that this cohort is transitioning from predominately male to more gender-balanced. Consequently, the female cohort's higher priority on climate is also shown in this cohort’s Top 10, which features three climate priorities (including the new priority on transitioning to climate-resilient systems). The Top 10 also reflects the lower-ranking female contributors placed on enhanced immigration settings. However, this has been replaced in the Generation X rankings by the priority focused on the coordinated promotion of careers in the sector.

As we always find, there is something a bit different in the Baby Boomer rankings. Last year they placed a higher priority on the sustainable use of oceans, giving that priority its only Top 10 ranking in 2022. This year however, it has found itself in the

overall Top 10. This year the Baby Boomer cohort has given two priorities their only Top 10 rankings. They have placed the other new priority, which relates to negotiating a free trade agreement with India, at eight and included increased protection for migrant workers at nine.

There is no question that the issue of modern slavery has gained greater media focus in New Zealand over the last year, and much of that attention has been on labour practices in the food and fibre sector. Like animal welfare, how the industry protects its most vulnerable and exposed employees is critical to the story that can be told to our communities and consumers. Protecting the migrant workers that help the sector to function is not just a cost to be managed but a matter of strategic importance to the sector maintaining its license to operate. Congratulations to our Baby Boomer contributors for highlighting this critical issue in the Agenda this year.



The big movers

Once again, we have seen plenty of movement in the priority rankings and scores across the 40 priorities included in this year's survey. Fifteen priorities increased in the rankings, 22 received a lower ranking, and three held their place. Regarding priority scores, 23 scored higher this year while 14 received a lower score (with three again recording no change, although it is three different priorities to those that did not move up or down the rankings).

Many priorities receiving the largest score increases have already been discussed, with many being boosted into the overall or cohort Top 10s. What is interesting to note is the scale of the increase in priority scores. In 2022, the largest increase in score on 2021 was 9.86% (for restricting foreign land and agricultural asset

Largest increases in priority score		Rank '23	Rank '22	Rank '23	Score '22	Change on '22
	Objective assessment of tree planting	4=	=32	8.06	6.58	22.44%
	Invest in resilient rural infrastructure	7	23	8.00	7.09	12.79%
	Act on the results of gene editing discussions	6	21	8.03	7.14	12.40%
	Increase protection of migrant workers	18	31	7.59	6.77	12.06%
	Co-invest to support tech adoption	14	29	7.63	6.87	11.14%
Largest decreases in priority score		Rank '23	Rank '22	Rank '23	Score '22	Change on '22
	Recruit offshore to lift relationships	34	27	6.76	7.01	(3.57%)
	Recognise strategic importance of food safety	30	19	6.88	7.26	(5.23%)
	Seek diversity of thought and knowledge	28	12	7.06	7.49	(5.68%)
	Innovation centres to collaborate with customers	36	16	6.64	7.36	(9.79%)
	Improve water quality to swimmable	33	11	6.82	7.57	(9.87%)



So, while a lot is happening to support the uptake of innovation, the reality is that much of it is happening in silos and focused on point solutions. The need to support producers to explore whole of system innovation solutions was raised by contributors during the roundtables.

ownership); however, this year, the top five upward movers are all showing greater increases than the largest mover in 2022, reflecting the higher priorities in general but also the greater focus we see this year on the need to respond to climate challenges.

The fifth highest score increase, co-invest to support tech adoption, relates to government and industry investing together to make it easy for producers to adopt innovation in their production systems or collaborative extension initiatives. During the last year, MPI has established its On Farm Support team, which has been launched with a specific focus on climate, water, and environment outcomes rather than the productivity and profit focus of many traditional farm consultants. We are also observing processors and

exporters becoming more aware of the benefits that can accrue to their business by partnering with suppliers to invest in adopting production innovation. So, while a lot is happening to support the uptake of innovation, the reality is that much of it is happening in silos and focused on point solutions. The need to support producers to explore whole of system innovation solutions was raised by contributors during the roundtables. While the priority is ranked 14th overall, the collaborative approach to extension is seen as a solution which could have exponential benefits the industry in the long term.

It is hard to explain the extent of the fall that the priority to improve water quality to swimmable has experienced in 2023. It has fallen from 11th last year in the rankings to 33rd this year with a decline in priority score of 9.87%. Yet, the importance of improving water quality is widely acknowledged in our conversations as a key element in respect of preserving the industry's license to operate. It may seem that frustration over water policy, including the reforms formerly referred to as Three Waters, has crystallised in response to this priority. Leaders may be thinking, why would we work any harder than the rest of the country? And if the

We have written in recent Agendas about the benefits that diversity of thought and knowledge through lived experience can bring to decision-making at a governance and executive level. We ourselves have sought to draw on that diversity this year through our Emerging Leaders Forum, and we firmly believe that bringing different perspectives to an issue will drive better outcomes.

rest of the country is trying to avoid its obligations, why would we put extra effort into this? It may be connected to the lack of strategic thinking around water we have already referred to. Whatever the driver for the ranking of this priority, there is one certain thing; continued media focus on poor water quality will ultimately constrain the industry's license to operate and could result in it being morally and practically lost.

Other notable declines in the current year include a drop of 16 places and 5.68% for the importance of seeking diversity of thought and knowledge into the sector and a drop of 11 places and 5.23% for

recognition of the strategic importance of food safety to the industry. Food safety is like animal welfare, modern slavery, and swimmable rivers it is a housekeeping issue which when nothing goes wrong, it slips down the rankings. The challenge is recognising its strategic importance and continuing to invest when successful investment is marked by nothing happening.

We have written in recent Agendas about the benefits that diversity of thought and knowledge through lived experience can bring to decision-making at a governance and executive level. We ourselves have sought to draw on that diversity this year through our Emerging Leaders Forum, and we firmly believe that bringing different perspectives to an issue will drive better outcomes. It was surprising to see this priority take a significant step backwards this year when we observed many organisations actively seeking to benefit from diversity. It just may be that this has fallen as a priority as it is perceived to have progressed from the to-do list to the completed list, but we would still suggest (after our shot of diverse thinking from the Forum) that there should always be time and space for a perspective that has not been heard previously.



New priorities in 2023

This year, two new priorities were introduced into the survey while five priorities we had previously sought industry leaders' views on were withdrawn.

The highest ranked of the new priorities, transition to climate-resilient systems, was included as a direct result of the catastrophic impacts the Auckland Floods and Cyclone Gabrielle had on parts of the country earlier this year. Almost all the discussions on climate and decarbonisation before this year centred on measuring an organisation's footprint and thinking about what can be done to reduce the footprint (through actual reductions or offsetting).



While these are important discussions, they missed the bigger picture of what we need to do to ensure our production systems are resilient to whatever the climate chooses to throw at us. What became very apparent during those three weeks of 'summer' was that our systems are not as resilient

as they need to be if we are to live and operate in a world where destructive climate events become the norm. Food and fibre production is the last globally relevant industry to leave so much of its operations to the vagaries of the climate, and worldwide we are seeing production systems reimagined and in-dooring where possible to lift system resilience. This is a conversation that we have recognised is now necessary for New Zealand, and we guess that while it was ranked 17th this year, it will be higher today than it was

when we surveyed in March, and it will be a priority that continues to increase.

The other new priority for 2023 is related to negotiating and completing an FTA with India. We included this priority as India has recently become the world's largest nation by population and has a rapidly developing consumer market with significant opportunities for us to grow in a similar way as we have done following the implementation of the China FTA in 2008. The difference between China and India is

What became very apparent during those three weeks of 'summer' was that our systems are not as resilient as they need to be if we are to live and operate in a world where destructive climate events become the norm.

The New Questions in '23		Overall	Male	Female	Millennial	Gen X	Boomer
	Transition to climate resilient systems	17	21	5	23=	8=	18=
	Negotiate and complete an FTA with India	23	17=	27	11=	28	8

Higher priority (10+ above overall)	Higher priority (5 to 9 above overall)	Higher priority (Within 4 above overall)	Consistent priority rank	Lower priority (Within 4 below overall)	Lower priority (5 to 9 below overall)	Lower priority (10+ below overall)
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that we already have closer relations with India, given that we both are members of the Commonwealth and share strong sporting links (through a common passion for cricket). As concerns grow about being overexposed to China, India stands as sizeable opportunity to create a trading relationship that benefits all. However, we have already lost the first mover advantage with Australia securing a trade agreement. The response to this priority was mixed, being ranked 23rd overall, but the question remains if we are overexposed to China, if not China, where?

The removed priorities

- Resource Food and Fibre Aotearoa New Zealand to act as the custodian of the industry vision, was removed as the vision, Fit for a Better World, is currently vested into MPI and informing their investment decisions.
- Transition towards resilient equity and debt structures and require all future finance to be sustainable were removed on the basis that we believe the market, through the impact of the new Aotearoa New Zealand Climate Standards will inherently transition towards sustainable

finance and alternative debt and equity structures to enable business as usual investment to be made alongside that the necessary to transition towards a lower carbon future.

- Manage fiscal and monetary settings to maintain the New Zealand dollar at the optimal level for exporters was removed as the priority was consistently lowly ranked, with most leaders believing that we are better off working with what the market delivers rather than trying to manipulate outcomes.
- Invest in digital technologies to support improved internal operations and customer experience was removed as this item was related to the consequences of the digital response to the pandemic. A range of other questions covers the role of innovation in the industry.



A new lens: Executives vs Governors

We have been surveying the priorities of industry leaders for 13 years; however, if you look beyond the demographic differences of the cohort (gender and age), we have always treated the role of leader as a generic leadership role.

The reality is that there are two distinctly different leadership roles within the cohort; that of an executive manager, involved in their organisation at a granular level on a daily (or at least regular) basis, and that of a governor, there to set strategic direction and monitor the outcomes of executive actions to ensure that the business delivers on the expectations of key stakeholders. These roles are distinctly different, which got us thinking about whether executives and governors should have differing priorities, given where their respective roles require them to focus.

Consequently, we added a new demographic identifier to the survey this






year and split the population between predominant executives and governors. Of the respondents, 63% described their role as executive and 37% as governance. The cohorts produced distinctly different Top 10s, with only two priorities ranked equally (both ranked World-class biosecurity first and objective assessment of tree planting programmes sixth). The Top 10s had four other common priorities, although rankings for these varied significantly (high-quality trade agreements, enhanced immigration settings, broadband equity for all, and acting on the results of the gene editing discussions) with the other four priorities in the respective Top 10s being distinctly different.

The executive cohort ranked working quickly to reduce food insecurity in New Zealand as their third priority, some 30 places above the governor's cohort, with a priority score 25% higher. This is interesting as we would view food inequity as a risk to the sector in the longer term, given that allowing it to persist will

Executive and Governor Top 10 Priorities		Executives		Governors	
		Rank	Score	Rank	Score
	World-class biosecurity	1	8.94	1	9.26
	High quality trade agreements	2	8.48	4	8.29
	Quickly work to reduce food insecurity in NZ	3	8.25	33=	6.58
	Accelerate innovation partnerships	4	8.02	14	7.37
	Maximise sustainable use of oceans	5	7.98	15	7.34
	Objective assessment of tree planting	6	7.97	6=	8.16
	Broadband equality for all	7	7.92	5	8.24
	Enhanced immigration settings	8=	7.91	2	8.53
	Act on results of gene editing discussions	8=	7.91	6=	8.16
	Supporting land owners to change land use	10	7.86	32	6.63
	Invest in resilient rural infrastructure	13	7.80	3	8.34
	Build water storage to manage water resources	15=	7.72	10	7.82
	Telling engaging provenance stories	18=	7.63	9	7.97
	Co-ordinated promotion of sector careers	23	7.40	8	8.00

progressively undermine the license to operate and the premium story exporters are able to tell their customers. We had considered that food insecurity was more likely to be a priority for governors focused on the longer-term interests of their organisation and the sector. The result may suggest that our perspective that food insecurity would slowly undermine the sector's positioning was overtly optimistic and that the community expects the sector to move faster. This is a message that needs to find its way into the boardroom.

The other unique priorities in the executive Top 10 included accelerating innovation partnerships (4th), maximising the sustainable use of oceans (5th), and supporting landowners to change their land use (10th). Interestingly, these are all inherently collaborative priorities but also speak to the industry's medium to long-term operating landscape. The executive cohort gave investing in pathways for regenerative agriculture a priority score of more than 50% higher than governors (although the overall difference in the ranking was only four places, 36th vs 40th). This, again, is a priority that talks to the long-term future of the sector rather than day to day operational issues that we would

Higher priorities for Executives over Governors		Exec Rank	Govern Rank	Exec Score	Govern Score	Exec Priority
	Invest in pathways for regenerative agriculture	36	42	6.72	4.47	50.34%
	Quickly work to reduce food insecurity in NZ	3	33=	8.25	6.58	25.38%
	Improve water quality to swimmable	26	37	7.34	5.95	23.36%
	Supporting land owners to change land use	10	32	7.86	6.63	18.55%
	Direct levies towards intergenerational projects	40	41	6.49	5.53	17.36%

Higher priorities for Governors over Executives		Exec Rank	Govern Rank	Exec Score	Govern Score	Govern Priority
	Build water storage to manage water resources	23	8	7.40	8.00	8.11%
	Enhanced immigration settings	8=	2	7.91	8.53	7.84%
	Recruit offshore to lift relationships	37	19=	6.66	7.13	7.06%
	Invest in resilient rural infrastructure	13	3	7.80	8.34	6.92%
	Clearer market signals to all in value chain	24=	12	7.35	7.71	4.90%

have expected to have been prioritised by executives.

As we noted earlier, the average priority score for governors was 7.10 compared to 7.41 for executives; hence the priorities that governors have ranked higher have lower increases in priority score over the executive cohort. It is interesting, though, to look at those priorities that governors did give higher scores to; three of the areas of largest difference (building water storage – which was discussed earlier as a critical long-term strategic priority for the industry, recruiting people in offshore markets to build and enhance long term relationships, investing in resilient rural communities) are all about the long-term positioning of the sector.

While executives and governors included enhanced immigration settings in their Top 10 priorities, it was notable that this was the second highest priority for governors. The challenges the sector has faced with labour availability are very well understood, but we had expected this short-term tactical response to the issues would have been given a higher priority for the executive cohort. The governor's cohort also included the coordinated promotion of sector careers in their Top 10 (ranked only 23rd by executives), suggesting that

the people pipeline for the sector is a key focus in boardrooms at the current time.

The results of this lens are interesting but have left us confused. We were expecting a clearer delineation between operational and strategic priorities, with the executive cohort being more aligned to operational priorities and the governors towards strategic. What we have found is that both have their eyes on strategic priorities but in many cases, they are focused on different priorities.

Maybe the key message from this lens is that it is important to allow time within formal board meetings and other catch ups to discuss the priorities that each member of an organisation's leadership team (board and executive) perceive as most important to the future of the business.

The insights of many will always trump the thinking of an individual. That is certainly the case when we envisage the future we wish to create together for an organisation, our community and our country.



The Priorities for our Emerging Leaders

Overall, the emerging leaders placed a lower priority on all survey priority statements compared to the current leaders. The average score the emerging leaders gave was 7.11, compared to the current leaders' 7.29.

The differences between these cohorts were greater when we compared the scoring for the current leaders' Top 10 priority statements. The current leaders ranked their Top 10 priorities on average 8.11 out of 10; while the emerging leaders ranked these same priorities 7.53 out of 10, with an average priority difference of 0.57 between the two cohorts.

The current leaders' Top 10





There were only four common priorities across the current and emerging leaders' Top 10 priorities. These were:

- World-class biosecurity
- Investment in resilient rural infrastructure
- Signing high-quality trade agreements
- Accelerating innovation partnerships

The overall 1st place priority revealed complete alignment for both current and emerging leaders in their selection of World-class biosecurity, which has been seen as a critical priority by our current leaders since we began conducting the survey 13 years ago.

Both cohorts ranked investment in resilient rural infrastructure and accelerating innovation partnerships similarly (within two rankings). Investing in resilient rural infrastructure ranked seventh for current

Emerging leaders rankings for the Leaders Top 10 Priorities

	Current Leaders Rank	Current Leaders Priority	Emerging Leaders Rank	Emerging Leaders Priority
 World-class biosecurity	1	9.06	1	8.50
 Sign high quality trade agreements	2	8.42	8	7.70
 Invest in resilient rural infrastructure	7	8.00	6	7.82
 Accelerate innovation partnerships	8	7.79	10	7.61

leaders and sixth for emerging leaders, and innovation partnerships ranked eighth and tenth for each cohort, respectively. However, the number two priority for the current leaders, high-quality trade agreements, was only ranked eighth by the emerging leaders and had one of the highest differences between the cohorts in the Top 10 priority scores (0.72).

Three Top 10 priorities of current leaders are significantly lower in importance for the emerging leaders

There were three priorities for the current leaders' Top 10 the emerging leaders ranked more than ten positions lower in priority. These include enhanced immigration settings, acting on the results of gene editing conversations, and

The priorities for our Emerging Leaders

Emerging leaders rankings for the Leaders Top 10 Priorities	Current leaders		Emerging leaders	
	Rank	Priority	Rank	Priority
World-class biosecurity	1	9.06	1	8.50
Sign high quality trade agreements	2	8.42	8	7.70
Enhanced immigration settings	3	8.13	18	7.34
Objective assessment of tree planting	4=	8.06	11	7.57
Broadband equality for all	4=	8.06	12	7.49
Act on results of gene editing discussions	6	8.03	=22	7.05
Invest in resilient rural infrastructure	7	8.00	6	7.82
Accelerate innovation partnerships	8	7.79	10	7.61
Maximising sustainable use of oceans	9	7.75	15	7.41
Telling engaging provenance stories	10	7.74	27	6.86

Emerging leaders Top 10 Priorities	Emerging Leaders		Current Leaders	
	Rank	Priority	Rank	Priority
World-class biosecurity	1	8.50	1	9.06
Co-ordinated promotion of sector careers	2	8.27	11	7.74
Develop resilient supply chains	3	8.21	12	7.69
Quickly work to reduce food insecurity in NZ	4	7.95	15	7.62
Industry wide leadership development scheme	5	7.89	26	7.09
Invest in resilient rural infrastructure	6	7.82	7	8.00
Increase protection of migrant workers	7	7.75	18	7.59
High quality trade agreements	8	7.70	2	8.42
Transition to climate resilient systems	9	7.64	17	7.61
Accelerate innovation partnerships	10	7.61	8	7.79

Higher priority (10+ above overall)	Higher priority (5 to 9 above overall)	Higher priority (Within 4 above overall)	Consistent priority rank	Lower priority (Within 4 below overall)	Lower priority (5 to 9 below overall)	Lower priority (10+ below overall)
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telling engaging provenance stories. The emerging leader cohort collectively ranked these more than 15 places lower to 18th, 22nd equal and 27th, respectively.

“Getting our house in order to retain our licence to operate”





Two of the emerging leaders’ Top 10 priorities were reducing food insecurity in New Zealand and increasing the protection of migrant workers. These are challenging national issues that can potentially cast our food and fibre sector in a negative light. The emerging leaders ranked them fourth and seventh, respectively. Their rankings and the much lower 27th score for engaging provenance stories reflect conversations at the forum. The emerging leaders expressed frustration at perceived inauthenticity within the sector in how we market ourselves internationally noting that the sector tends to sweep some of these issues under the rug at home. Solving the tension between achieving profitable margins for producers while still managing to feed our own people was an area they felt strongly needed addressing; this came through as they explored how to embed trust within our sector.

Similarly, the emerging leaders ranked enhanced immigration settings as their 18th priority, 11 rankings below increasing the protection of migrant workers (ranked seventh). While the current leaders are indeed responding to immediate critical labour shortages in the sector, the emerging leaders are cognisant of our sector’s social licence to operate and consider how we treat those working within it as a more pressing need.

“People, people, people”

Four of the Top 10 for emerging leaders relate to how our sector looks after and treats people, both inside and outside the industry. Of note, two of the emerging leaders’ Top 5 priorities are related to developing people into and within the sector.

In what cynics may call a vested interest, the emerging leaders ranked a industry-wide leadership development scheme as their fifth highest priority. The current leaders ranked this priority as 26th, which was the most significant ranking difference between the two cohorts Top 10s, perhaps a vested interest on the current leaders part too?

Emerging leaders priorities	Emerging Leaders		Emerging Leaders	
	Rank	Priority	Rank	Priority
 Co-ordinated promotion of sector careers	2	8.27	11	7.74
 Quickly work to reduce food insecurity in NZ	4	7.95	15	7.62
 Industry wide leadership development scheme	5	7.89	26	7.09
 Increase protection of migrant workers	7	7.75	18	7.59

The emerging leaders’ second ranked priority was the coordinated promotion of sector careers, which has fallen to just outside the current leaders’ Top 10, ranking 11th in 2023. As an exercise at the start of the Emerging Leaders Forum, we asked the attendees to form a continuum line of whether they saw the food and fibre sector over the next decade becoming either the ‘employer of choice for talented young people’ or ‘struggling to recruit the people it needs’. Many said they wished they could place themselves further toward the ‘employer of choice’ end but did not believe it would be the reality within this decade, based on their current experiences in the sector. This

explains the high-ranked importance of this priority for emerging leaders.

Last year, the current leaders ranked promotion of sector careers as high as fourth, but it has fallen out of their Top 10 in 2023 to 11th. At the same time, enhanced immigration settings have increased from ninth in 2022 to third this year.

Have our current leaders given up on recruiting future talent to the sector instead preferring to import talent, or is this just a reaction to the immediacy of their own organisation’s current needs?



When emerging leaders become sector leaders, the catastrophic impacts of climate change will occur with greater frequency and severity on the food and fibre production systems that exist today.

A difference in perspective on supply chain resilience

The third highest-ranked priority for the emerging leader cohort was developing resilient supply chains. This priority fell seven places for the current leaders to just outside the Top 10 for 2023. Discussions with current leaders gave us the impression that this fall in ranking is because the disruption has become

business as usual and something they deal with almost daily. This may explain why the emerging leaders ranked the priority so highly, as they tend to be the people within the organisation dealing directly with these supply chain disruptions.

Climate resilience



Two of the emerging leaders' Top 10 priorities relate specifically to building climate resilience within our sector. The emerging leaders ranked investing in resilient rural infrastructure and transitioning to climate-resilient systems as sixth and ninth, respectively. In both instances, they ranked these higher than the current leaders. This may be due to the timing of the surveys, with the emerging leader cohort conducting theirs roughly one month later when the wider consequences of Cyclone Gabrielle had become more apparent.

While resilient infrastructure was similar between cohorts, transitioning to climate-resilient systems had one of the larger ranking differences, with the current leaders ranking it 17th compared to the emerging leaders' ninth.

This cohort can see the effects of climate change today, and they know that in the future, it will be the key issue they will need to lead the sector through. When emerging leaders become sector leaders, the catastrophic impacts of climate change will occur with greater frequency and severity on the food and fibre production systems that exist today.

By ranking both these priorities in their Top 10, they recognise that the sector needs to move now to adapt to our changing climate. Of all the global investment into climate change, mitigation projects account for 94%, with adaptation projects only 6% of investment¹.

Also of note, emerging leaders at the Forum expressed disappointment that He Waka Eke Noa had shown such promise but appears to have faltered at the last hurdle because it represented a real and genuine opportunity for true sector-wide collaboration to resolve one of its biggest challenges.

Emerging leaders priorities	Emerging Leaders		Emerging Leaders	
	Rank	Priority	Rank	Priority
 Invest in resilient rural infrastructure	2	8.27	11	7.74
 Transition to climate resilient systems	4	7.95	15	7.62

¹UN Conference on Trade and Development Report 27 October 2022

A drone is shown in flight, spraying a field of crops. The drone is white and black, with four rotors and a central body. It is positioned in the upper right quadrant of the image. The field below is filled with green plants, and the background shows a sunset or dusk sky with warm colors. The overall scene is a blend of technology and agriculture.

Stepping up innovation

Stepping up innovation

Change is inherent in life. While some thrive in an environment of constant change, many find disruption to their comfortable status quo confronting and threatening. The food and fibre sector in New Zealand has consistently evolved over nearly 200 years, responding to emerging technologies, changes in customer expectations and, more recently, substantive shifts in weather patterns. As we suggested as a provocation to the Emerging Leaders Cohort, the challenge is that most of our innovation and change, since the first shipment of frozen meat was sent to the UK in 1882, has been evolutionary rather than revolutionary.

However, the growing impacts of climate change, the emergence of new biological technologies and the need to take strategic positions in the emerging blue and bio economies mean that we have reached a point of inflexion where the rate of evolutionary change is no longer sufficient. There was broad agreement during our roundtable conversations that the industry is entering a period where rapid change is not a nice to have but an absolute necessity to maintain our competitive position and relevance.

It is interesting to look around the world and observe how other countries respond to the fundamental shifts in the global food and fibre sector. One contributor highlighted the approach taken in Singapore to rethinking their food system, where they have set an ambitious goal to produce 30% of the food consumed in the country on (and around) Singapore Island by 2030.

They are now redefining food production systems to bring this to life and will accelerate technologies that reshape global food systems as a result. It was exciting to hear the emerging leaders being challenged to think boldly, with discussions touching on the impacts that the ambition to travel to Mars could have on the global food system over the next decade, for instance.

Our discussions clearly show that industry leaders recognise that the future is arriving, but it needs to be consistently distributed across organisations and people. It was highlighted that there is plenty of ambition across the industry to step into the future, despite the level of change it will require. People and organisations are prepared to work hard and to take on risk, but they want to be able to plug into vibrant innovation systems, have certainty over the regulatory framework they face and have confidence that the necessary investment will be made into the infrastructure that will enable them to chase their ambitions.

Finding pathways to a lower carbon future

The climate challenges we face have been bequeathed to us by our parents and grandparents. They are the consequence of 200 years of Western, industrial living. We did not ask for these challenges but to give our children, grandchildren, and generations to come a chance; we must catch the proverbial short pass and now need to do the heavy lifting to lead our families, our communities, our industries, our country, and the world through a period of unprecedented and confronting change.

Last year our contributors noted that the weather was changing, harvests were getting later, crops were being lost, and positive economics were being turned upside down. There was an acknowledgement that doing nothing was no longer an option, but the prevailing view

was that we still had time to find the right mechanisms so that change did not overtly disturb the status quo. There was a clear view that we had to find ways to make it possible for food and fibre businesses to reduce or mitigate their carbon emissions while remaining economically viable.

In reading the section on climate change in last year's Agenda again, there is an obvious and glaring omission – what if the climate becomes so destructive, unpredictable, so often that the status quo becomes untenable? There was little discussion last year on the options available for producers or sectors to transition if it is no longer possible to grow the food and fibre we do today in parts of the country. What if it is no longer rationale to do agriculture and horticulture free range, in the open air as we have historically done or to fish our traditional waters as the fish have moved on?

It is fair to say that the weather events of January and February this year have

fundamentally changed the climate change conversation in New Zealand. Climate was the most discussed topic in this year's roundtables, and there was a remarkable consensus of views. The predominant view of contributors was effectively summed up in one comment, which noted that we had spent 95% of our time arguing about emission measurement and charging mechanisms, and this has taken our eye off the real game – climate change is not some esoteric, future construct that may or may not impact us. It is real, it is here, and we are already well behind in ensuring we build resilience in our industries.

While weather is always inherently volatile, there is mounting evidence that we are deviating from long-term seasonal patterns. Sucking up the disruption this year as everything will revert to the long-term mean next year was identified by a contributor as a cultural behaviour inherent across the industry that people need to be coached to move beyond. They suggested that we need to help people

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to understand what normal could look like in the future and support them in thinking about how this changes their business. It was also highlighted that we need to give those working across the industry and in our rural communities the confidence that we have solutions to our challenges in the pipeline – this is not just telling them about the innovation we could do but giving them a sight of the options that are being



developed and timelines for them to have access to the solutions.

Thinking quickly but clearly on resilience

The scale of the damage and the trauma that the summer storms delivered has moved the issue of climate resilience up the agenda for many organisations and producers across the sector. That said, the second year of drought conditions in

the deep South has also given the issue added priority in that region, although with a different lens. While the immediate inclination is to rebuild what has been damaged and destroyed, contributors highlighted the need to pause before diving into reconstruction to consider what should be built back as it was and what needs to be different. For contributors, 'different' covered everything from how land is used, the necessary system changes to enable more production to be done undercover, and permanently retreating from land

extremely vulnerable to continuous climate disruption.

It was recognised that, for many, these will be challenging conversations. The emotional attachments to land and well-established and understood practices are very strong. Clear thinking now is critical if we are to ensure that the next storm or drought, and each will undoubtedly follow, can be ridden out safely and, more importantly, our rural communities and their economic engines are able to get up and operating quickly to minimise the emotional and physical impact that these uncontrollable events deliver. This means rethinking how we manage water through our catchments and store it for later use, how we ensure core infrastructure like roads, electricity networks, and communications are resilient and questioning whether we are using the right farming systems for what the climate will be rather than what it is today.

Rethink carbon farming

The rise in concern around the growth in dedicated carbon farming ventures is palpable across the sector – in the priority the issue was given in the leader's survey and through comments made during our

roundtables. One contributor noted that it is possible to transform New Zealand into a climate-positive country within a single generation if we bring the right mindset to the problem, but not if we continue to allow productive food-producing land to be transformed into ever larger permanent exotic forestry plantations. With the Climate Commission highlighting that offsetting is not a long-term solution to the climate challenges we face, there was widespread agreement that there is an urgent need to take a pause on greenlighting foreign investment in carbon forestry and develop a more holistic policy response that also considers the impact these developments are having on our rural communities and other alternative land uses.

There was also frustration expressed in some sessions that policy settings have taken the easy option of allowing the recognition of carbon being sequestered in exotic. While officials have been reticent to explore providing farmers and landowners credits for the many other ways that carbon can be permanently sequestered within our farming systems. Contributors argued that creating transparent and easily accessible systems to measure, track and trade carbon sequestered within a farming

system will be critical to facing into our climate challenges while other technologies are developed and commercialised. Several contributors expressed frustration that the genesis of these mechanisms and tools was inherent in He Waka Eka Noa. Still, the government's response to the partnership package has impacted our ability to move forward collaboratively.

Availability of climate-tech

Some contributors raised concerns that New Zealand is neither a leader nor a fast follower in climate tech as our regulatory processes make it too difficult to get biotechnologies across the border, and to date, we are not investing fast enough in novel climate-related technologies. Several contributors called out the establishment of the Centre for Climate Action Joint Venture as a positive step, not only for the size of the initial investment but for the fact that it is a public-private partnership taking a commercial lens to create a step change in the availability of climate-tech solutions for the sector. The contributors during one of our roundtables did question why we are not seeking international partners for the joint venture, suggesting its impact could be multiplied many times for Aotearoa and the world if we welcomed key customers like Nestle or Tesco into the partnership.

The investment platform

One thing is certain, the investment requirements in front of the industry as it works to reinstate what has already been damaged and build resilience into its operations are significant. While the government has been quick to provide initial financial assistance to help those suffering the most significant damage from the summer storms with their initial response, they have indicated that they will not foot the total cost of building resilience into the industry's operations. Therefore, much of the bill will fall on farmers and growers, who will be looking to their banks and insurance companies to support them in making these critical investments. Now is the time for these key industry partners to step up to the plate and bring innovative products into the market, such as long-term debt facilities at preferential rates to support producers changing their land use or building infrastructure that enhances operational resilience. We also need insurance solutions that give people the confidence to invest, given that we know the investment is being made against an increasingly volatile climate background.

**Now is the time for
banks and insurance
companies to step up
to the plate and bring
innovative products
into the market**

Unleashing biology

As one contributor put it when discussing gene editing, we have fallen well behind the world, suggesting we have been sitting on the fence for so long that we have splinters in our...(you can work that out).

However, the general view was that a conversation on gene editing has gained momentum this year, not in a coordinated way but informally, with many making small contributions, some just indicating they are willing to join the conversation, which is building momentum for the overdue discussion. We believe there is a desire for a robust, informed conversation, and our roundtables indicate no unanimity on where we should end up. There is, however, broad agreement that failure to have a mature conversation, with or without the politicians and government, will see us fall further behind other countries in the technology available to producers.

While the discussion focused on gene editing (no one wants to talk about transgenic gene modification, for instance), contributors noted incredible opportunities in a range of biology-based technologies. These innovations enable competitors to create new-generation products (for instance, better, more functional cultivars) faster than traditional techniques. The real risk is that we end up with perfectly good but old products, which become harder to export as they lack key attributes important to consumers and necessary to navigate the non-tariff barriers that countries are continuously erecting to protect domestic producers.

Accessing softer solutions

It was not only our rules on genetic technologies that were seen as limiting our ability to unlock the full potential of biology in New Zealand. Several contributors talked about the challenges they face getting modern, lighter chemicals and animal

health medicines across the border. It was noted that for the global company's commercialising these products, New Zealand is a small, insignificant market and, currently, a market with a clunky, slow, and expensive regulatory process. They often ignore our market as it is not worth the time and cost involved in obtaining product registration, leaving our producers with old solutions and greater residue risk as we export to the world.

One contributor suggested that we should be pivoting our regulatory environment so New Zealand is seen as the place that welcomes companies looking to trial innovative lighter chemicals.

A country that recognises and ratifies approvals granted in markets with equivalent regulatory systems to ensure we can deliver the best environmental outcomes while protecting our exports' competitiveness. Ensuring our regulatory agencies are adequately resourced was seen as critical.

Importing new biological material

A challenge that contributors also identified is the costly and slow process of importing new biological materials as an issue for the sector. The reality is that horticulture is a

We should be pivoting our regulatory environment so New Zealand is seen as the place that welcomes companies looking to trial innovative lighter chemicals.

fashion-driven sector where new varieties quickly supersede existing products, meaning a steady flow of new cultivars is critical to remaining competitive. Many of these cultivars need to be licensed from overseas producers. It was suggested that the current system is not geared to the needs of growers or our customers, and while MPI is looking to commission a temporary facility for plant importation, there are no current plans to explore a permanent solution to the problem. Although private companies handle most plant importation, it creates public benefit through the boost it delivers to the economy (and benefits it could create for climate resilience through importing alternative fast-growing trees to radiata). One contributor suggested that the current system leaves individuals to not only take the commercial risk but the system also amplifies the regulatory risk they must navigate.

Bio and blue: accelerating our transformational economies?

In last year's Agenda, we highlighted the benefits the industry generates from many decades of intergenerational investments made in the 1960s, 70s and 80s, particularly in the dairy sector. The kiwifruit sector reflects the investment growers made into the gold kiwifruit and how they did not rest on their laurels when the fruit was successful but continued to invest so that Sungold was available to be commercialised when PSA struck down the Hort16A variety. The industry today echoes the investments of those that have come before, but there is a real question as to whether the industry is doing enough today to be a good ancestor to those that will come in future.

What is clear is that intergenerational investment today will look very different to what that investment looked like in the past. As we pointed out last year, intergenerational investment today is about having difficult conversations to ensure tools needed in the future are available – for instance, in biotechnology and gene editing. But it is also about ensuring the necessary steps are taken to establish a strong position in emerging economies – specifically the circular bioeconomy and the blue economy. In a world where economic growth is no longer assured, there will be parts of the global food and fibre system that will shrink while others grow, reflecting a rebalancing of consumer and community expectations.

The best opportunity of benefiting from this rebalancing is strategically positioning the industry to play a key role in these emerging, sustainable economies. The opportunities that are available in the blue economy were raised in most roundtable conversations, with contributors



highlighting both the opportunities to grow existing aquaculture operations, particularly in deep ocean regions, as well as exploring opportunities in emerging, innovative sectors, including new nutritional markets, carbon sequestration as well as blue energy.

The sweet spot will be when two or more of these areas can be effectively integrated to truly unlock the sustainable use of our oceans. One contributor suggested that, given the size of our oceans' exclusive economic zone, we should clearly affirm an ambition to be the global leader in ocean tech.

While this is a bold ambition, the general view is that we need to make more progress in advancing our position in the blue economy. We heard stories of the hurdles existing aquaculture businesses need to clear to access small areas of additional water space and the prohibitive costs of doing this. More significantly, contributors also talked about the need for more progress in some of the bigger conversations needed around ownership rights in respect of our marine environment and where the boundaries for use should be drawn. It was suggested that progressing this conversation is further away today than

While we may aspire to lead in ocean tech, there appears to be much work to do to get to the start line.

last year. Entrepreneurs with an ambition to build new-generation ocean businesses and create prosperity for the country are increasingly looking internationally to advance their plans due to the regulatory uncertainty here. While we may aspire to lead in ocean tech, there appears to be much work to do to get to the start line.

We were surprised about the lack of discussion during the roundtables on the opportunities available to New Zealand food and fibre businesses in the bioeconomy solutions. This lack of discussion, together with the priority relating to the development of a globally significant bioproducts sector only being ranked 38th (with a priority score of only 6.29), gives a clear message that this opportunity is not on the radar of industry leaders at the current time.

Recognition that the product we grow often only represents a fraction of the biomass created and that potential nutrients, energy and bioactive ingredients are in the by-products is critical if the sector wants to grow value while holding volume. A future revenue model for a biological-based business could be one-third from the target product, one-third from selling ecosystem services to the community and a third from turning by-products into bioproducts and monetising these. Ignoring the bioeconomy could make global competitiveness impossible in the future.



Emerging Leaders: Innovation and creativity

Perspective from the Emerging Leaders Forum

Nothing we have done or are doing is transformational or innovative

As facilitators, we were deliberately extreme and provocative at the start of this innovation journey. We argued that the food and fibre sector in New Zealand has had no revolution since the first successful shipment of frozen meat in 1882 and that everything that the sector has achieved since this massive step change has been an evolution, regular tinkering around the edges rather than revolution. Recognise this starting point should challenge you, whether you agree or disagree with the statement.

As a sector, we need to push ourselves more when we develop transformation plans – showing the vision that will elevate them from the usual evolutionary plans.

The Kiwi Valley of Agrifoods: the future 2038 vision from our emerging leader cohort for an innovative and creative sector

Fifteen years from now, New Zealand will be as synonymous with innovative food and fibre systems as Sweden is with creating pop music hits. Just as nearly every chart-topping hit seems to be written or produced by a Swede now, agri-food innovation, food and fibre IP and disruptive technology can be traced back to Aotearoa, New Zealand.

The future the emerging leaders imagined became one where children associate food with a laboratory rather than a farm, where many of our current challenges, such



as biodiversity loss, food insecurity and resource depletion, disappear and 'farming' as we know it in 2023 becomes niche. In this future, New Zealand will be the global leader in innovative products which enable profit while ethically enhancing the environment.

Many reading this are likely recognising parts of this future as already underway and not necessarily 'transformational'

The Emerging Leaders Forum had only hours for discourse that would take weeks to truly do it justice. For this reason, our emerging leaders could not take their future visions to the absolute challenging and radical levels of creativity. Two issues stood out as we progressed throughout our afternoon, firstly, there needs to be more understanding of our own national innovation ecosystem, and secondly, some individuals need help to permit themselves to be creative and to think outside the box.

Time is relative: there needs to be a balance between allowing time while also accelerating decisions and action

We challenged the emerging leader cohort to create long-term actions to achieve the 15-year futures they envisioned. In return, our emerging leaders challenged us with the following statement, "you're talking about long-term decisions being within 10-15 years, but for our organisation, that's short- or immediate-term – we are thinking 700 years into the future". This perspective highlighted the difference in paradigms that influence how we think about challenges and opportunities and alternative problem-solving approaches. How different would things be if we considered the impact of our short-term decisions on a 700-year time frame rather than a 15-year one? Is it possible that where we are today, as a food and fibre sector facing planetary challenges, is a result of how we frame time?

As a sector, we need to understand that there are undoubtedly innovative approaches that cannot be generated from the predominant paradigm of thinking. How do we create the space to understand how indigenous wisdom could bring an innovative approach to innovation, research and creativity in our sector? It is also important to recognise that there is a difference in approach to decision-making between our Māori and non-Māori organisations, and we

Is it possible that where we are today, as a food and fibre sector facing planetary challenges, is a result of how we frame time?

must find a way to allow enough time and space for conversations to occur but also to enable pace and accelerate transformation within our industry.

Action: Given the immediate urgency of issues, how do we think with a long-term intergenerational outlook but act responsively and ensure both Māori and non-Māori organisations in the sector have sufficient time for decision-making?

Create the space for Māori to lead the collaboration and co-design, don't 'consult'; we need to talk more even if it makes some people uncomfortable, for in the discomfort lies the innovation. We don't have the answer to this, but we believe finding the solution is critical to the future of Aotearoa New Zealand.

The emerging leaders' roadmap: Doing the 'basics' better

The emerging leaders concluded that we must create a community of creative food and fibre people for the future. As an industry, we have relied on science to make our food and fibre sector among the most efficient producers in the world. This has worked exceptionally well for New Zealand agriculture, there's no denying that. However, because of our success in doing this, we have forgotten how to use creativity to accelerate scientific discovery. As a country, we will miss out on our future if we don't change - those who pick up the challenge will go elsewhere.

Some of our emerging leaders were brave enough to admit they were not creative. As a sector, we should also be brave and willing to admit we have been guilty of silencing those who think creatively ["differently"] and have labelled them as nonconformists who don't understand the sector, system, or world we live in. We must question whether we have the right mix of people within our sector to take us into the future, or are we just an evolutionary iteration of the sector in 1882? Creativity and innovation can be learnt and

can be as small as changing your mindset to question everything and practice flipping your assumptions – but we need to give ourselves permission to try and fail.

Action: Build the left side of our sector's brain: organisations and individuals need to invest and spend time practicing being creative.

Action: Attract and retain people who can think creatively in our sector. Do this by fostering an open innovation environment, which encourages young entrepreneurs to grow their ideas in New Zealand.

“What if there were no ‘sub-sectors’.. because we’re all just part of one food and fibre industry”

As a food and fibre industry, we continue to try to solve our issues and challenges in a siloed, sector-based approach. The emerging leaders saw real potential in having cross-sub-sector collaboration with an integrated approach to solving our collective challenges. The emerging leaders suggested an immediate action is to develop a system where science, technology and end users work much more closely to co-design rather than 'consult' one another.



“He waka eke noa had the opportunity to be so much more”

The emerging leaders commented that an opportunity was missed with He Waka Eke Noa and expressed disappointment that the initiative, which had such promise, appears to have fallen apart in the end. Despite this, the primary sector partnership for climate action exemplifies how the food and fibre industry could collectively work together to realise an innovative transformational future.

Action: Primary sector-wide partnerships for innovation and a call once again for greater collaboration and integration.

Glimpses of an even more ambitious future

Imagine a future in 2038 where not a single container ship leaves New Zealand carrying food or fibre products. Yet, the markets in China and Japan proudly stock New Zealand kiwifruit, and UK consumers are treated to premium New Zealand lamb grown by a UK farmer. Imagine a future where Rocket Lab, out of Mahia Peninsula, is the world’s leading supplier of leafy greens.

Imagine the future where every single one of these products sold, regardless of where in the world or atmosphere they were grown, has an equitable profit distribution right back into Aotearoa.

Throughout our session, the emerging leaders began to scratch the surface of what an ambitious future could look like. The idea of putting te Taiao first led them to explore what a sector that minimises resource use looks like – ultimately ending up in space using zero-gravity food production to feed future populations. In this future, business KPIs are rewritten from ROE, ROI and EFS to measure the mauri of te Taiao. The idea of being world leaders in genetic technology led the emerging leaders to imagine a future where we don’t export products but rather IP and knowledge; profit from food and fibre is based on a royalties-type model.

“Just because we can do something, should we?”:

A counter perspective

One consequence that the emerging leaders considered early on was the opening of Pandora’s Box – what is the risk to traditional species and values if we innovate because we can? What does that mean for our national identity? A similar question was raised regarding growing food in zero-gravity – what does that mean with respect to severing our relationship with the whenua? Are there unintended consequences in our quest for innovation – socially, culturally, environmentally, spiritually and, in the long term, possibly economically?

Emerging leaders identified Mātauranga Māori as something that has always been and will always be here as uniquely of Aotearoa New Zealand and our food and fibre system, but should commercialisation or exportation of this unique IP occur? The Forum did not have time to address or seek to answer these questions, except to say that a Māori-led conversation on authenticity, appropriateness and protection needs to happen simultaneously with any

creative innovation and transformation of the food and fibre sector. But having the conversation is one thing; how we respect, acknowledge, and share power in the broader conversations is something to turn our minds to.

What needs to happen to push the vision further

Open innovation: creating an ecosystem that enables innovation and creativity - reframe Aotearoa’s landscape

Our current innovation model encourages competitiveness rather than innovation and does not incentivise collaboration. Our crown research institutes are competing against one another for funding, and requirements to have industry partners co-funding research to unlock government funding means that often knowledge and IP are not shared.

Part of the issue is geographical – we must co-locate various industry actors or at least bring them together regularly to share research and knowledge. The emerging leaders commented that there should be “knowledge exchange going forward together rather than being competitive”. There is no

roadmap for how to make this happen, but we can look to others to see what could be done - Italy recently launched an agrifood tech centre in Verona to stimulate an innovation culture in their sector and create a strong, sustainable entrepreneurial ecosystem. The organisation managing the hub works actively across four continents, has a community of over 25,000 start-up founders and works with more than 40 corporate partners and governments.

New Zealand needs an industry actor that is the connective tissue of the sector, which would facilitate strategic connections between all stakeholders in the industry and across the globe. While some may argue that there are food and fibre organisations in Aotearoa that do elements of this, we need to be more ambitious and more deliberate in how we are doing it.

To achieve this open innovation ecosystem, it will require more than shuffling the deck chairs to bring everyone into the same space with the current model intact. We must be more courageous and look beyond what we have always done to change our trajectory.

This means we need a total dismantling of the system and to rebuild from scratch with open innovation as our starting point, making the whole greater than the sum of its parts.

Additionally, as a sector, we need to open our definition of food and fibre and whom we can partner with - if we want to be as ambitious as growing zero-gravity food in 2038, we need to partner with rocket scientists! Organisations within Aotearoa's food and fibre network should collaborate beyond what we think of as the 'food and fibre sector,' keeping an eye out for unusual partners, which will also bring in diversity of thought from collaboration.



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Leading the unconverted

Leading the unconverted

Listening to some of the contributions during the roundtables, you would think that the food and fibre sector is fulfilling the predictions made at the start of the century; that it is a sunset industry with limited prospects in its future. The confidence boost that the sector gained from the resilience demonstrated during the initial period of the pandemic has all but faded with the fatigue that has drained its energy over the last two years, now appearing to have become a millstone that is dragging many down. You would not think that our food and fibre sector is part of a global food system that is being transformed by the fusion of physical, digital, and biological innovation, the emergence of a new wave of entrepreneurs and premium consumers that are increasingly connected to the food that they are choosing to eat.

There was a clear view during the roundtable conversations that industry leaders and influencers have a reasonably good view of the scale of the opportunity in front of the industry and what needs to be done to realise the benefits for our producers, communities, and country. The challenge, however, was clear; that while the sector's leadership are largely on the same page, many others in the sector, particularly at the grassroots producer level, are not seeing or understanding the opportunities available or the actions that need to be taken to realise the benefits that are available in the transforming global food system.

Our industry leaders are leading the converted, but at the current time, they are not leading everybody in the sector. While there has been a view in the past that moving forward with those that are on the bus is not a major impediment to progress, it has become clear over the last year that in key areas, there are

insufficient people on the bus to enable progress to be made at the necessary pace (climate emissions being a notable example). There was wide agreement that much needs to be done to engage many more people in the sector around the full extent of the opportunities available. Connecting them to hope is a key strategy.

There was also a lot of discussion about ensuring that the industry attracts and retains people who have passion for the sector and are aligned with playing a role in realising its future potential. The emerging leaders highlighted that without rethinking the value proposition offered to potential and existing people working in the sector, there is a lot of work to do for the sector to position itself to be an employer choice in a decade.

Leading towards hope

The economic challenges facing many businesses are significant; however, contributors noted that costs across the food and fibre sector have increased at levels that far exceed headline inflation rates. Feed and fertiliser costs have been impacted by a range of factors, including energy cost increases and the war in Ukraine. Labour shortages have seen significant rises in the costs of people across organisations (when people have been available), and the OCR increases have lifted the cost of money for many. It has not just been the cost side of the equation under pressure, with many sectors experiencing greater pressure on pricing in the last 12 months, and for some, this has

been compounded by reduced yields due to weather. Combine these issues with the operational impacts and cost increases associated with new regulations (which are discussed in more detail on page 65, and many contributors highlighted that many grassroots operators lack hope for their future.

This is leaving many operators having to make choices about their future. Some farmers are deciding to exit the industry and, in some cases, choosing to sell their land to the international carbon farmer prepared to pay the highest price, which is putting pressure on rural communities. Others are delaying investment decisions until the future looks more certain, while many are looking for opportunities to manage their operating costs, which will have consequences on productivity in the future. The leaders and influencers that participated in roundtable conversations



continuously highlighted the difference between the future they saw for the industry and the significant concerns many in the industry are currently working through. They recognised that there is a fundamental disconnect between those sitting in board rooms and leadership forums and those outside of those conversations in the view they hold of the future and the steps that need to be taken to realise that future.

The question arising from these conversations is whether current sector leaders can make stronger connections with those operating at the sector's grassroots and provide the hope to create a critical mass of people that are on board to enable the sector to accelerate its transformation journey. The point was made by several contributors that it is critical that leaders with the capacity to lead at the grassroots level are identified

and their development supported. It needs to be recognised that these leaders will not always be found in the boardroom or the CEO's office, but they are influential because of their ability to lead at the community level through the actions that they take and the trust that they build with others in their communities. The example was given of the success that leaders of many water catchment groups have had in creating positive community outcomes.

The way that relationships are developed in Māori communities was highlighted in the conversations; that trust and the right to lead come not from the position but the time that is invested into a relationship and the trust that is developed over many cups of tea. One of the challenges for sector leaders is that they have very diverse priorities and are likely to find it almost impossible to free sufficient time to invest in building trusted relationships at the grassroots level; they will likely always be seen as coming to tell people what they believe they need to hear even if their intention is to listen. Supporting those that already lead by their actions in local communities and providing them with the knowledge and tools to connect the people they interact with daily to developments beyond the farmgate,

We can move mountains when we work together, but we must first agree on where we are going to move them.

as well as putting effective feedback loops in place so justified concerns and uncertainties of those at the grassroots level can be learned from is seen as critical to boosting hope across the sector.

One contributor noted that we are facing many crises at the current time. The cyclone demonstrated how communities can pull together in a crisis in a way that is impossible at other times. They noted that facing multiple crises at the same time seems to have resulted in people not knowing where to start, and the emotional toll of having so many issues to deal with has seen people lose hope rather than lean into finding solutions. When we have hope, we can do amazing things. As one contributor suggested, we can move mountains when we work together, but we must first agree on where we are going to move them to.

The cyclone demonstrated how communities can pull together in a way that is impossible at other times in a crisis

Attracting the next generation

The people shortages the industry faces are well documented. While the pandemic has undoubtedly made the issues worse, it was clear before 2020 that growth expectations would place pressure on the labour force. Attracting talented people into the sector is not a new priority; it has always been a priority, with individual organisations and sectors running their own campaigns, but the challenges of the pandemic have seen attraction initiatives being ramped up significantly, with broad industry-level initiatives, such as the Opportunity Grows Here programme initiated by MPI, being added to the attraction mix.

It is, however, hard to objectively assess the success of these programmes in moving the dial on the industry's workforce challenges in a substantive manner. There is no question that they do attract people, but an analysis done for the Food and Fibre Centre of Vocational Excellence suggests that as many as 70% of these people leave the industry within one year. A factor that may make people stickier is the age they are introduced to food and fibre and the varied career opportunities it offers. While providing an experience to a primary school child today is not going to address immediate workforce challenges, evidence suggests that providing early experiences, together with a co-ordinated programme of engagement over the child's school years, will increase the likelihood of a person taking a long-term role in the sector. The reality is that talent attraction is an intergenerational issue, and investing at scale to support education programmes is unlikely to generate returns in three or six years, making it less attractive to government and industry good bodies and



meaning this is a role that companies need to step into.

There has been a lot happening over the last decade to connect the industry to schools better and deliver materials to support teachers to use food and fibre-related examples across the learning curriculum. The most significant of these initiatives, Agribusiness in Schools, initiated originally by St Paul's Collegiate School in Hamilton, has celebrated its 10th anniversary earlier this year and now has students across the country taking NCEA achievement standards in a range of agribusiness-related topics. Despite the successes, the predominant perspective expressed during the roundtables is that we need to do more to engage and embed food and fibre experiences and learning materials into the school system.

It was suggested that the sector should have a particular focus on supporting STEM learning across the school system, with the point being made that, as a country, we are not doing enough to give kids exposure to the fascination of science and the inquiry and investigation skills science provides. There is also much we can do to connect the social and environmental issues that are important to young people (food security, animal welfare, climate change), to the food and fibre sector, particularly as an industry

offering career opportunities that enable young people to contribute to improving outcomes in critical license to operate areas. A concern was raised that there is a significant shortage of teachers able to inspire students in the classroom (around 50% of agriculture and horticulture teachers have no practical sector experience). Pay is insufficient to attract people with deep sector experience into teaching. This is a difficult issue to address under the current union pay structures and requires an innovative response. Could companies employ teachers that they contract to schools under a peripatetic model (like that used for specialist music teachers)?

A final attraction issue raised in several conversations is the critical importance that Auckland will play in determining the sector's future, both in respect of the license to operate and as a key source of talent. Auckland has the deepest talent pool for the sector to draw on, yet the suggestion was made that it is often viewed as a problem rather than part of the solution. A significant boost in the efforts made to grow understanding of the sector was proposed, both in schools and through events like A&P Shows and Food Festivals, so that the opportunities in the sector are clear to students and their parents, as are the pathways available to enter the industry.

There is also much we can do to connect the social and environmental issues that are important to young people to the food and fibre sector.

Becoming an employer of choice

The last three years have changed the game for employers around the world, and it is no different for New Zealand's food and fibre sector. Globally, the industry has historically relied on a transient, seasonal, low-cost labour force to provide muscle when needed and to move on when help is no longer required. The sector has not had to think too much about being a great employer to many of its people as they were not expected to be around in three months' time. People were available when there was a need, so manual jobs stayed manual. The economics did not work to automate the roles, and employment conditions, including wages, hopefully, met legislated minimums.

The lockdown restrictions that formed a key element of the global pandemic response have made life extremely difficult for these migrant workers and caused them to think about how they provide themselves and their families greater security. The labour shortages we observe in New Zealand are being repeated worldwide as workers seek greater employment and income security, causing employers to rethink their role as an employer.

As one contributor noted, for decades, we have recruited people and turned them into robots doing repetitive, manual, but not necessarily unskilled tasks, but that is now changing. We now need to invest in real robots (be they physical or digital) to automate manual tasks and place emphasis on growing and developing our people so they truly become what we have always said they are, a key competitive advantage of the industry. It was highlighted during the Roundtables that for many across the industry, this

means rethinking their employment proposition so they can retain and grow their team over time. There is a need to transition from a take-it-or-leave employment proposition towards becoming an employer of choice for the talented people the industry needs.

Several contributors highlighted the important role that automation will play in the sector's future. The fusion of three key drivers was highlighted as unpinning the acceleration of automation occurring across the sector; recurring labour shortages, and the consequent increases in the costs of employing people, which means investments that historically did not make economic sense now do and the rapid evolution of digital and physical technologies making it possible to automate activities that would have been practically impossible only a few years ago. We heard of automation investments being made in sectors as diverse as fisheries, forestry, and red meat processing, while the horticulture sector

For decades, we have recruited people and turned them into robots doing repetitive, manual, but not necessarily unskilled tasks, but that is now changing.

has, by necessity, been investing heavily in this area over the last few years, as we discussed in the last Agribusiness Agenda.

Just as we have work to do with the education system to attract young people into the food and fibre sector, contributors indicated there is much to be done to get vocational and professional development and training pathways working effectively for both employees and employers. The issues with the establishment of Te Pūkenga have been well documented in the media. Contributors perceived that these issues have impacted the organisation's ability to accelerate programme innovation and develop deeper

partnerships with organisations across the industry. The point was made that it is critical that we ensure we are getting the most out of all the talent already in the sector, and relevant training is critical to that, but it is important that the training goes beyond the purely technical elements of a topic and connects people with why we are doing things.

However, it was highlighted that being a good employer is about more than providing a decent job and relevant training; it is also about investing in people to help them grow and develop so they can contribute fully to their families, communities, the sector, and country rather than just the business. Part of being a good employer is wanting the best for your people; this includes recognising that a person may grow out of your role and move on but seeing this as success rather than a personal slight. It was highlighted that we need to be exploring how we equip people with knowledge about innovation and technology that goes beyond their immediate needs, for instance, preparing them to thrive in the Artificial Intelligence world we are rapidly moving into. In addition to pastoral and development needs, evidence suggests retention is enhanced by giving team members time to actively participate in

We need to be exploring how we equip people with knowledge about innovation and technology that goes beyond their immediate needs

networking opportunities and community activities, providing the chance for development and connecting a person to a place.

It was suggested that any retention initiative should have full regard to the expected career journey a person will take. The reality is, for New Zealanders at least, this is likely to include a desire for overseas experience. During the Roundtables, we heard about retention challenges in many sectors as people leave for an OE. Thinking about how connectivity can be built with international partners so that offshore experiences can be delivered as part of an integrated career journey has the potential to retain a person in an organisation long term. Such arrangements also offer opportunities for exchanges to bring in equivalently skilled people with new ideas to backfill an absent employee.



Emerging Leaders: Changing the definition of leadership

Perspectives from the Emerging Leaders Forum

Aotearoa's food and fibre emerging leaders are redefining the role of leadership. Over the next fifteen years, rather than reinventing leadership, our emerging leaders articulated the qualities of leadership as collaborative and driven by a purpose, to inspire change. Traditional leadership has provided a sense of stability, but our world is no longer stable. The emerging leaders see leadership as an evolving verb rather than a noun; our world changing from the idea of individual leaders to a network of leaders that adapt together to our increasingly unpredictable world.

As a sector we need to create hope within change

Leadership that inspired hope for the future was a common thread at the current leader's roundtable.

This continued into the forum where people, and the leadership of others were seen as key to the sector's future. The emerging leaders recognise the sector has pockets of good, and examples of great leadership. However, the consensus amongst the cohort was that the misalignment between leaders in the sector is resulting in a fragmented approach to address the industry's fundamental issues. We, as a sector, are challenged with how to approach leadership, or redefine it, in a way that will inspire hope for all involved in producing, processing and exporting food and fibre and tackle the adversity we know the sector will face in the coming years.



To drive the sector forward we must change the definition of leadership. Leadership entails a new mindset and a conscious change to the current leadership models and ways of doing things. The emerging leaders felt we need to move away from a hierarchical leadership model to a more multi-level leadership structure. In this model, leadership would be recognised across a diverse range of employees, skillsets and age for example, and they are actively involved in the decision-making process when they have relevant skills or knowledge. The aim would be to ensure the outcome is best suited to everyone within the organisation. It is important to note, this does not mean abandoning traditional leadership skills, but rather allowing the sector to think beyond the current assumptions and models that can restrict our thinking.

The emerging leaders challenged leadership beliefs that underpin the sector, raising questions of how to encourage the sector to be comfortable sitting in an environment of ambiguity, and how to lead with confidence and encourage more people along for the journey?

Bridging a generational divide

‘Mā tōu rou, mā taku rourou ka ora te iwi’

Emerging leaders feel they lack support within the food and fibre sector, whilst the current leaders lack context of the changing world.

To address these issues, the cohort suggested a two-way mentoring programme. They identified the conversations at a Millennial or Gen Z dinner table as vastly different from those discussions at a “Boomer” dinner table. The disconnection between generations is partially contributing to the crisis of confidence within the food and fibre sector.

Mentorship can be a symbiotic relationship, enriching both mentor and mentee. It is a pathway to enable a continuous learning environment for mentors, keeping them connected with those they lead, whilst enabling progression and growth for mentees. A two-way mentor programme is a way for the sector to connect the emerging leader’s generation with the current leaders’ experience, inviting everyone’s

Leadership [must] be recognised in a diverse range of employees, across skillset and age

voices to the table. By embedding this approach and perspective of mentoring into the food and fibre sector, over time the sector can literally embody the whakataukī - “with my fruit basket and your fruit basket, the people will thrive”.

Action: Build a two-way mentoring programme to bridge the gaps in thinking across generations.

Current succession pathways within the food and fibre sector are not conducive to growing diverse leaders

Active succession creates space for the next generation of leaders to be involved in decision-making, whilst still having the safety net of the current leadership’s guidance and expertise.

The emerging leaders proposed a succession pathway, whereby a current leader identifies their successor as one of the first actions in their role, to give the emerging leader a chance to learn from them and shadow their work. This will help our emerging leaders develop the skills they require, ensuring the success of the sector’s future leadership.

However, as a sector we also need to be mindful of choosing those who are already like us, perpetuating a cycle of leaders with the same mindset. This risks stifling diversity of thought, as it is human nature to be drawn to mentor those with similar characteristics. We run the risk of repeating old habits and the sector never truly evolving. As a sector, leaders should actively choose someone who challenges their thinking, to encourage creative solutions, rather than finding their ‘mini-me’.

To make way for emerging leaders, they feel that current leaders should be responsible for increasing turnover within leadership positions. This approach to leadership allows both generations to create a legacy, with the acknowledgement that we do not, and should not, hold our roles for eternity.

Action: Normalise succession - one of the first decisions leaders make in their role is to identify and begin mentoring their own replacement.

The food and fibre sector could benefit from greater collaboration of its leaders

Organisations within the food and fibre sector operate within similar landscapes and encounter similar challenges.

The weather, labour issues, technological barriers, a need for innovation and shared market experiences for example – yet they do not talk anywhere near enough with each other. As a sector we need to create an environment where individuals are encouraged to move freely between sub-sectors, and regularly share in lessons learnt.

In many instances there are leaders who sit across multiple boards and organisations and can provide insight on what’s happening in other sectors and from a broader macro perspective. Many of these leaders have ownership in multiple enterprises spanning industries, something many emerging leaders do not have, nor is it a shared experience for all current leaders in the sector. Having a sector that enables and encourages broad discussion and sharing will allow for knowledge exchange and collaboration.

This discussion stemmed from an emerging leader’s comment that “historically kiwis have selfish mentalities, we individually farmed our way out of recessions and pandemics rather than working together”. Instead of sharing from challenging times, the sector returned to business as usual and therefore is in no better position to cope next time we have a crisis. The sector continues this siloed approach to farming which leaves our sector exposed ... again.

What if we took leadership learnings and implemented virtual fireside chats which are open to all that are interested, in a similar way that Te Hono briefings are conducted now. Current leaders could share their career journey and perspectives on industry issues and markets and take questions from those on the call. This would provide open access to industry knowledge and learnings with a two-way dialogue.

Action: Encourage emerging leaders to take an active role in multiple industries within the food and fibre sector. Create fireside chats as an opportunity for current leadership to better share with one another beyond their own specific industries.



Better support for current leaders will attract and retain leadership talent

The current hierarchal model and environment leaders operate in is seen as an obstacle, which is making leadership unappealing. It is no secret that leadership can be a lonely role. The emotional burden

on leaders can make leadership look unattractive to the next generation. In the leader's roundtable sessions, concerns were raised that current leaders appear to be 'shot as messengers', or being given the blame, and questions were raised around how to better support them. Our emerging leaders concluded that being a leader within the food and fibre sector is

more than simply running an organisation or sitting on a board. By creating more space for wider leadership roles, more individuals can carry the leadership baton and spread the load to better support current leaders.

A model for purposeful leadership

What would happen if leaders had to retire at 55? This was posed by our emerging leaders and led us to think even further, instead, what if leadership wasn't a role you retire from because you've reached a certain age? What if rather a leadership position was solely action orientated?

The emerging leaders expressed their desire for 'purposeful leadership'. A concept where we look to leaders to fulfil a particular purpose and when this is achieved another goal is set with another leader taking the helm. Purposeful leadership would ensure leadership remains fresh within our sector, and allow emerging leaders more opportunity to lead, while also allowing current leaders the opportunity to leave a legacy and continue to contribute meaningfully to the sector in ways that excite and invigorate them.

Action: Evolve to a model of purposeful leadership.

There is a balancing act that we need to navigate between emerging leaders earning the right to be in the leadership space and being given the opportunity to lead. Current leaders need to invest in those who will come after them, whilst emerging leaders must take responsibility and acknowledge that they will need to build trust and credibility first in order to be seen as a leader. If we work to operate within our food and fibre sector as a network of leaders, collaborating both within our own organisations and across industries, we will be in a much stronger position to tackle our unstable and changing world.



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Investing in defensible trust

Investing in defensible trust

In previous Agenda's, we have written about the world we live in increasingly becoming a post-factual society, where people seek out 'facts' that suit their worldview and associate with others with similar views creating highly connected communities of interest. Within these communities' deep trust is formed around their world view but also mistrust grows of others with differing views. The recent 2023 Edelman Trust Barometer talks about the social fabric weakening and society becoming dangerously polarised amid deepening divisions because of social anxiety, disinformation, mass-class divide, and a failure of leadership.

During the Roundtables and the emerging leader's forum, there was much talk about the importance of building trust with the communities the food and fibre sector operates in, the wider society in New Zealand, and the markets and consumers we sell to around the world. The reality is that this is easily said, but building trust is becoming ever more difficult in a world that trusts less and is increasingly closed to listening to views from outside its community interest. The traditional concept on which business relationships are developed and trust built, my word is my bond, just does not work in today's world as it relies on a personal relationship being developed first.

Contributors talked about many elements that build trust, the role that regulation plays, the expectations consumers have around providence and the need to back everything with robust data. Plenty of suggested actions could be taken, which would undoubtedly enhance the trust platform that the food and fibre sector

has built its market position on over the last 40 years. The question is, what needs to be done to build trust in a way that is sustainable and defensible into the future in a world that trusts very little?

What is clear is that the bar to achieve trusted status is dynamic. It is consistently rising and will require more work and investment in the future than it has in the past. The regulatory platform on which the sector operates needs to be intentionally designed to meet the needs of the community and market, but with the support of those that it regulates; otherwise, its credibility will be called into question. Engagement with markets needs to be equally intentional, recognising that trade must benefit all that it impacts, not just the exporter. At the same time, everything must be backed by credible data, something that the emergence of Generative AI tools makes more critical than ever.

Regulating with purpose

One of the most discussed themes during the Roundtable conversations was regulation's impact on the industry. Concerns were expressed that current regulatory settings and, more significantly, the regulations farmers and growers believe are going to be proposed, at both a central and local government level, are dragging on innovation, incentivising hiatus rather than investment and creating fear about the future. The consequences highlighted by contributors included low confidence, reduced resilience, and deteriorating mental health of people across the industry.

We concluded that there is fear of both the known and unknown facing the sector. This is supported by results of confidence surveys, like those recorded by Rabobank New Zealand's most recent Rural Confidence Survey, which showed that a net 58% of those surveyed expected conditions in the agricultural economy to deteriorate over the next year (although this was up from net 71% negative in the December quarter last year).

There was, however, recognition that regulation per se is not the problem. It was recognised that regulation serves many purposes; to keep us safe, to protect the environment for the future, to ensure an effective connection with markets and, at times, to cause us to at least pause and think about the practicalities of our most outrageous ideas (although as we have written before if any idea about the future is not at least somewhat ridiculous at first sight, then it is probably not being ambitious enough). Distilling the many comments on regulation, the core of the

issue we face appears to be that we have, in many cases, lost the connection of regulation to the purpose it is trying to fulfil.

People are observing rules that look to be for nothing more than making another rule. Consequently, the narrative quickly evolves from an empowering regulatory framework to one that leaves people drowning in red tape, wasting time and money.

Leading the regulatory conversation

A question that came up during several Roundtable conversations centred on who is responsible for connecting regulatory initiatives to purpose. Some suggest the onus lies solely with the regulator as the creator of the rule, while others indicated that industry leaders have a significant role to play as they are best positioned to explain how a requirement connects to better business outcomes. That said, several contributors noted that many sector leaders have been subject to heavy criticism in the last year for taking positions

People are observing rules that look to be for nothing more than making another rule. Consequently, the narrative quickly evolves from an empowering regulatory framework to one that leaves people drowning in red tape, wasting time and money.

on regulations they believe are right for the industry's long-term future.

The outcomes of the Beef+Lamb NZ election were announced as we conducted the Roundtables. Several contributors noted that if the consequence of being open about the need for reforms around matters such as climate is to be voted out of office, it will make industry leaders think carefully about the role they play in future regulatory initiatives.

There was strong support expressed for leaders that are prepared to act as effective governors and stand up for what they believe to be the best outcome for the industry regardless of the personal consequences they face.

The point was made that the sector will only work effectively for producers if there is an effective governance system, enabling governors to lead in the best interests of all and work to deliver practical and empowering regulatory outcomes and policy settings.

Going slower to move forward faster

Whether it is geopolitical uncertainty, extreme weather, technological disruption, or social inequity, the world is changing rapidly, and regulators are not resourced to keep up. There is a need to be able to move fast. The industry expects regulators to keep pace, but sometimes there is a benefit in slowing down to allow time to think, engage, and question before regulations are written and enforced. The point was made that taking the time to listen to a wide range of perspectives around a new regulation is critical, as those most affected are often the 'experts' that can help design better rules. Contributors

suggested that slowing down will ultimately assist the industry in moving forward faster as rules will be easier for people to work within, more understood and connected to the benefits they will deliver to organisations and the industry.

A point made by several contributors is that when it comes to regulatory benefit, the most common nexus that is drawn is between a piece of regulation and the creation of a market premium. The reality is that most regulation is not intended to underpin a market attribute that a consumer is prepared to pay a premium for but is designed to protect the sector's license to operate and a ticket to play. The challenge arises when the promised premium from regulation does not materialise, leaving those having to comply with costs but not necessarily any additional revenue. This can quickly start to undermine morale and leave people questioning the need for the rules. While the regulation may have stopped revenue from falling, it was highlighted that there is a need for regulators and industry leaders to be more realistic about the outcomes that any regime is likely to deliver, as promising benefits where there is no certainty of realisation is a key factor undermining regulatory confidence.



One contributor effectively summed up the energy that has been spent on regulatory issues in recent years. They noted that we tend to over-talk in New Zealand while the world gets on with doing. What is more critical than having the perfect regulatory framework is that we do stuff to make a difference rather than talking about doing stuff and waiting for perfect. This requires a change in

mindset from where we are today. To one where regulation is seen as an enabler and regimes are proportionate to the risk being addressed, responsive to feedback and agile, so when something is identified as not working, the confidence exists that it will be addressed quickly and collaboratively. We are far from this now, but such a system is critical to delivering on our aspirations for the industry.

At least we are talking about markets again

When we held our 2022 roundtable conversations, there was very little focus on consumers and markets, probably reflecting that industry leaders had largely been stuck onshore for much of the last two years. With the borders reopening, contributors spent more time discussing market issues this year. The key theme related to the markets during the conversations was whether we have sufficient diversity in the countries our products are exported to, particularly given the level of dependence on the Chinese market, with concerns being raised around geopolitical tensions currently centred on China.

There is no easy answer to this, particularly when Chinese customers are willing to pay more than customers in many other countries. Individual organisations' decisions on their exposure to China will depend on how they assess the market access risk associated with China, alongside the other opportunities available to them.

It was highlighted that trust is central to the sector's future, but it was considered to be as big a threat as it is an opportunity. As is often noted, it takes a long time to build trust and only one misstep for it to be destroyed, but the point was raised as to whether we are doing enough to build deep, sustainable trust with our key markets and customers.

Trust comes from the way you act and the relationships that you build with customers, but it is increasingly also connected to the proof points that can be provided in areas such as carbon emissions, ethics, quality, safety, and modern slavery.



Ensuring our story is substantive is more critical than ever.

While we are measuring and reporting data in relation to many of these metrics, organisations often use an approach that suits them best rather than doing it in a way that is recognised and understood by the markets we are selling to. Trusted proof points come from consistent approaches to measuring and reporting data using internationally recognised standards. A contributor suggested that we tell nice stories, but without the data, the story is only a story. It was recommended that organisations move urgently to consistently adopt more globally recognised measurement standards. However, it was recognised that this would require investment in new skills, infrastructure (particularly in the data area, which we will address in more detail shortly) and collaboration to adopt leading-edge practices to ensure that our market positions are protected.

Ensuring our story is substantive is more critical than ever. The New Zealand brand can be a superpower, but it was suggested that we recognise that there are many around the world (competitors, activists,

and governments) are looking for any shortcuts to find reasons not to buy our products. The markets we have returned to differ from those we operated in before the pandemic. Countries are putting significant effort into building domestic food resilience, which is changing how they think about imports, supporting local producers, and incentivising consumers to buy locally sourced products.

The implication of this is that what we have done in the past will no longer be sufficient, with many contributors suggesting responses, including accelerating the trade for all proposition to ensure we inherently look to do trade in a way that delivers win/ win outcomes for importers and exporters. The need to ensure that we are getting clear signals from inside a market was also highlighted as critical, with several contributors highlighting the need to invest in having more people in markets who can understand the subtle alterations occurring and provide advice on how we best respond to these changes. It was also suggested that after so long at home, it is important to make a significant investment in connecting the grassroots to the market so that our farmers, growers, fishers, and makers can understand who they are producing food for and build relationships directly with consumers.

Trust ... is increasingly also connected to the proof points that can be provided in areas such as carbon emissions, ethics, quality, safety, and modern slavery.

Nothing should be safe from digitalisation

The mainstreaming of Generative Artificial Intelligence ('AI') has significantly accelerated in the first half of 2023, and one contributor noted that the power of tools like ChatGPT, an AI chatbot first released in November 2022, is an awakening that cannot be ignored as to the inherent power of the technology tools that are now available. The reality is that these tools will transform the world in ways we can not envisage. Nothing we do today, at any point along the value chain, should be safe from exploring whether it can be done better, more effectively or at a lower cost by a sophisticated digital tool.

These tools will unlock significant opportunities for consumers to gain deeper insights about companies supplying products, but they also provide organisations with the ability to secure insights that have not previously been available to them. We heard from contributors about some of the use case opportunities they envisage for AI, providing the ability to effectively integrate a series of distinct technology solutions to create tailored system-based solutions for farmers and growers. Another contributor talked about the opportunities in analysing the data generated by sensing technologies to better direct on-farm and processing activities, while others highlighted the potential for the multiple benefits that could be derived from the investment into cameras on fishing boats by delivering better environmental and economic outcomes for all. It was noted that there are so many benefits from applying AI tools to data that the returns will depend on how far companies are prepared to push their technology adoption.

Globally, the food and fibre sector has slowly embraced digitalisation, although many organisations have actively explored and invested in digital technology in recent years. However, the speed at which AI will shift the goalposts and transform the playing field will challenge many companies.

While many farmers and growers in New Zealand prefer to avoid being on the bleeding edge of technology, they look to be fast followers in adopting promising solutions. Several contributors highlighted the uptake of the Halter wearable devices on dairy cows over the last year as a demonstration that the right technology will be picked up and used quickly after early adopters have proven the benefits. The suggestion was made that the right solutions will scale soon, particularly when the digital/ human interface has been designed to be intuitive for people who are not IT experts, making adoption easy and increasing the chance to extract benefits from a solution, particularly one that can connect multiple elements of a production system.

A risk for New Zealand in optimising the data and AI opportunity is that the country still has to establish a neutral, open-access data exchange platform, a core infrastructure that many other countries have already built. Contributors continue to highlight the need for a platform. While key industry players have been working to advance a business case, progress has been slow as concerns about a platform remain, including the trust that information will only be used as intended, particularly in relation to regulatory matters. Urgent progress is needed in developing a platform to exchange data; we need to address the continuing unwillingness to compromise over the control of data, as this has the potential to have a significant long-term cost to the industry. If we fail to develop the tools and intellectual property we need to compete, given our market size, nobody else will do it for us.

Emerging Leaders: Trust is hard to earn, but quick to burn

Perspective from the Emerging Leaders Forum

It's 2038, and New Zealand is known globally as the country with authentically produced products from producers with clear value sets aligned with their customers. Provenance stories shared with consumers are no longer solely images of green pastures and beautiful hill country – but data stories with data points across the value chain, validating their various claims and credence attributes.

The emerging leaders went as far as to imagine a world where trust is built less on certification but on personal relationships between individuals. A world where trust between peers, whether they be producers, regulators, or consumers, is inherent. This future is one where this level of trust is facilitated through peer-to-peer networks, and authentication no longer comes from a

checkmark on your product but trust that your peers in the network have your best interest at heart.

Reflecting on the discussions from the emerging leader's forum, a clear theme is that achieving the future vision will be hard, but doing hard things is one of our greatest opportunities to showcase the sector's ability to be trusted.

These complex challenges, which will genuinely unlock trust for emerging leaders, are centred on solving the domestic social inequality issues,

Reflecting on the discussions from the emerging leader's forum, a clear theme is that achieving the future vision will be hard, but doing hard things is one of our greatest opportunities to showcase the sector's ability to be trusted.



New Zealand will only be seen as a trusted nation if food insecurity can be resolved.

enabling the interoperability of data and technologies, and showcasing authenticity.

Actually, doing the hard things embeds trust to a far greater degree than just talking about them ever will. The sector needs to rebuild its ambition to do hard things again.

One of the current leaders at our roundtable sessions framed it as: “We need to find our ambition again - our ancestors were highly ambitious”.

Achieving hard things proves our capability, competency and dependability, regardless of the degree of difficulty.

Our home base must be secured first

The emerging leaders had strong perspectives on the word trust, and it triggered some tension amongst the group. The sentiment of the discussion was focused on the belief that there is no boundary on how far our consumers could look to determine whether a product can be trusted. Our food and fibre sector can't sell on the back of a trust attribute when our own house isn't in order.

It was mentioned that if the consumers of 2038 are anything like those represented in the forum's room, social

issues will only become increasingly more important to them and ultimately dictate their purchasing habits.

Food insecurity continues to be a topical but unresolved issue. If Aotearoa's food and fibre sector will ever sell from a position of trust, this must be on the top of the agenda. Existing programmes that are in place on the ground and creating real change for those who suffer the worst of food insecurity need to be bolstered and supported. New Zealand will only be seen as a trusted nation if food insecurity can be resolved.

The emerging leaders highlighted the need to develop and invest in other initiatives that can drive significant change for those suffering the worst of food insecurity. Initiatives such as the removal of GST on fruit and vegetables or a mechanism that would see a quota of fruit and vegetables brought from producers at a fair market rate and distributed to those in need within the region. Such a system, with a regional quota of fruit and vegetables, would enable equitable distribution of value to the producers and the access and distribution of nutritious food to those in need. These initiatives all have fiscal implications, with one emerging leader noting with sarcasm, “The economists are going to love this...”

but the emerging leaders see it as a necessary issue to address.

Action: Implement initiatives that address food insecurity to ensure producers are paid a fair rate for fruit and vegetables to be retained in a region and redistributed to those in need - encouraging equity through fair value distribution instead of charity.

New Zealand is world-class in sharing our data stories

To achieve a future centred on trust, the utilisation of data and data systems will be a linchpin for success. Innovations today around the use of Generative AI, precision agriculture, biodiversity credits and carbon accounting could extrapolate into a future where abundant use of transparent data across the value chain occurs and unlocks significant new value, but only if the data can be utilised.

The emerging leaders were incredibly excited about the opportunity of consumer-accessible farm practice data, building a connection from the start of the supply chain to the end consumer. They envisaged a future where consumers could see data down to the individual animal and crop level,



understanding what was involved in creating the produce being offered to the consumer and the face of the producer and processor who nurtured it.

The emerging leaders felt that while the sector struggles with understanding and leveraging how data is collected, consolidated, interpreted, and ultimately delivered in a format of interest and use for the consumer, the focus should be on unlocking its potential interoperability across value chain participants. An industry-led data exchange designed to provide a protected space where value chain participants can utilise, share and compare data must be developed to unlock this potential. This solution will help the sector and the various value chain participants to articulate that New Zealand's products are trustworthy.

Action: Investment into developing an industry data exchange where data can be shared and utilised appropriately between value chain participants.

Customer connectivity

Hand in hand with the utilisation of data-based stories, personal relationships will continue to foster trust. These relationships evidently take time to nurture and develop but are best started early.

Exposure to stakeholders helps build rapport between parties and a familiarity that AI and data will struggle to replicate. However, these relationships will still be built on authenticity and knowledge. Knowledge will come in both formal and informal manners – e.g., shadowing a current leader or working in a particular area of an organisation, while authenticity will reflect personal values.

If young people can take responsibility early in their careers, it shows evidence that they [the emerging leaders] are a critical part of the business and its future. Customers find a degree of comfort in knowing that the individual they meet today will be there tomorrow, the week after and potentially for years to come. The emerging leaders shouldn't be locked into these organisations for their entire careers, but exposure to upcoming talent naturally enhances the long-term proposition of the business and ensures enduring relationships.

This action point will only work if there is bidirectional trust, built over time, between the current and emerging leaders in the sector.

To the emerging leaders, in order to be trusted, you must apply yourself and have individual perspectives but also the maturity

to take on new information to shape, adapt and be willing to listen to others.

Trust begins to form between people when this nexus is reached.

Action: Current leaders - Take emerging leaders with you (intellectually and physically). It's recognised that individuals who demonstrate increased abilities to perform in ambiguous or high-pressure environments have often had significant responsibilities from early stages in their careers. Keep this momentum and encourage them to stretch themselves.

Built on authenticity

The emerging leaders also discussed the fact that the sector is likely going to need to look beyond the immediate premiums that are currently available. One emerging leader cited, "Value creation for the New Zealand ag sector isn't a given internationally". The cohort felt that it is authenticity which underpins so many of the trust attributes. Authenticity in that the sector does what it says it will do, does right by people and the planet, and that our data stories showcase reality.

Signals like 'cancel culture' indicate a growing trend for values alignment influencing consumer behaviour and societal demand for authenticity. The emerging leader cohort reflected on the frustration they felt when they sensed inauthenticity, whether that be in a consultation process, the inappropriate use of Mātauranga Māori, or even in some of the stories told to consumers, which only ever reflect the good things that occur, not reality.

Data-based stories will force transparency and authenticity, but the sector needs to be more upfront and develop a more profound association with authenticity.

Action: Authenticity becomes the backbone of every initiative, campaign, solution, and decision. With it, the food and fibre sector can avoid being cancelled and left behind.

“It isn’t the mountains ahead to climb that wear you out. It’s the pebble in your shoe”

Trust is developed over time rather than a single instance or moment in time. It is earned by delivering on a promise, and while the emerging leaders want to solve

the issues that are hard, they are crucial to the shared success of our sector and are not insurmountable.

For the emerging leaders, trust in our sector and products will be gained by solving the critical societal issues that will enable New Zealand to be trusted as a nation. Supplementing the building of trust for the country and its production systems by taking the next generation of leaders to our customers to build the relationships that will result in the next major trade deal, sale, or relationship in 2038.



Lincoln Roper

Senior Advisor, KPMG Propagate™
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“It isn’t the mountains ahead to climb that wear you out. It’s the pebble in your shoe”

Muhammad Ali



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FOOD & FIBRE INSIGHTS SHORT COURSE

We're excited to announce the launch of registrations for our third cohort of the Food & Fibre Insights Short Course, presented in collaboration with KPMG New Zealand.

This action packed course runs over a 7 week period bringing together academic and industry thought leaders from New Zealand and around the world.

The refreshed content for cohort 3 includes:

- Future of food and nutrition
- Water, oceans & the Blue economy
- Value chain and growth
- Innovation across the value-web
- Safety and provenance

This course is designed to be a 4-6 hour weekly time commitment. Registration spaces are limited to ensure we can maintain quality engagement between our participants and speakers. Registrations are on a first-in, first-serve basis.

What did our previous cohorts have to say?

"Lots of food for thought. This was a highly stimulating and insightful experience that I would not have missed for anything."

"Fantastic. Great Innovation. The most interesting, stimulating, informative and thought provoking professional development course that I have ever participated in."

"The course was filled with likeminded individuals, and I feel incredibly grateful to of had the opportunity to network and have high level discussions with them about the particular topics the course covered. Would recommend this course to anyone."

"This course made me think about how I should be presenting the Food and Fibre industry to my students. We are very proud of our country's products and assume we can keep using the same formula for future success, but this course highlighted to me the need for creativity and innovation at every stage of the value chain."

REGISTER HERE

Save 40% with
Super Early Bird pricing
available to 6 July 2023

Get in touch with the course coordinators:

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Course Dates:
21 August 2023 – 6 October 2023



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The 2023 KPMG Agribusiness Agenda reflects the opinions of agri-food sector leaders across New Zealand and the world through survey insights, group discussions and one-on-one interviews, we're grateful to all 161 of them.

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