



# ANNUAL REPORT

## 2025





**mia**  
Meat Industry Association

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# Chair and CEO Foreword

As the saying goes – the only constant is change and the rate of change is increasing – Peter Diamandis

As we celebrate 40 years of the Meat Industry Association (MIA), this could not be truer. This time last year the outlook was bleak, however, we have turned a corner with recovery coming sooner than expected.

Most markets saw clear signs of recovery, migrant work visa settings have improved, and two new trade agreements have been reached in the Middle East with negotiations in India well underway.

In June, the Ministry for Primary Industries (MPI) released its latest Situation and Outlook for Primary Industries report, forecasting an increase in both red meat export revenue and on-farm profitability.

The positivity this has had on the sector was evident at the 2025 Red Meat Sector Conference in Christchurch in July, where MIA and Beef + Lamb New Zealand Ltd (B+LNZ) unveiled a new strategy to boost export returns, as analysis shows non-tariff trade barriers are costing the industry an estimated \$1.5 billion every year.

Our Pathway to Growing Value Action Plan replaces the Red Meat Sector Strategy 2020 and focuses on removing hurdles to production, while adding value to operations, and leveraging market opportunities. More information on the action plan is outlined in this report.

Combined with the latest biennial *Barriers to International Trade* report, the two documents clearly show the opportunity to unlock significant economic value through trade policy and improved market access.

Together, they provide a roadmap for working with government and trading partners to systematically reduce these barriers and grow value across the sector. If we get this right, it means more money back into farmers' pockets, and more reinvestment in processing innovation and sector growth.

The growth over the last year and forecasted increase in red meat export revenue shows positive momentum but also highlights how much unrealised value remains.

**As the second largest goods exporter and a significant employer in provincial areas, the rewards are clear: greater economic growth, more jobs for New Zealanders, and increased income for the country.**

Along with other sectors, red meat processors and exporters are navigating an international landscape marked by greater protectionism, disrupted supply chains, and economic instability. Despite this keeping the sector on its toes, the export revenue for the red meat industry increased by 10 per cent in 2024/25 with a total revenue of \$10.87 billion.

The lift in key meat export prices has been driven by tighter beef and lamb production globally. While the volume of exports for both sheepmeat and beef was down compared to last year, there was an increase in export value, due to high per kg values.

The United States was the sector's top market over the last year, exacerbating the uncertainty caused by the US Administration's announcements regarding tariffs. While the 10 per cent tariff announced in April has largely been absorbed by US importers, the impact of the additional five per cent announced recently remains unclear.

Overall, export prices are high and expected to continue to climb over the next few years. This shows the red meat sector continues to be a strong driver of economic growth for New Zealand, particularly considering this very good performance is off a lower base than other sectors, such as dairy.

As a result, red meat processing margins remain tight with farmers receiving the lion's share of returns, which is great news for rural communities where approximately \$100 million is spent each week.

This year we have seen the China market start to recover, although it is still far from the high experienced in 2022. China continues to be a strategically important market for the sector, and the refreshed Taste Pure Nature campaign aims to drive increased consumer demand in Shanghai by lifting awareness with consumers on the natural health benefits of New Zealand red meat.

MIA continues to build strong relationships with key stakeholders which helps to navigate the complex and challenging environment in which we operate. Relationships will continue to be the core of how MIA does business and influences policy to achieve better outcomes for our members.

Engagement with the government has been positive over the last year and MIA is focusing on lifting awareness of the red meat sector with all parties as their focus turns to the 2026 election.

The next 12 months look to be as eventful as the last and we look forward to implementing the six priority areas under *Our Pathway to Growing Value Action Plan*, making a true difference to our members.



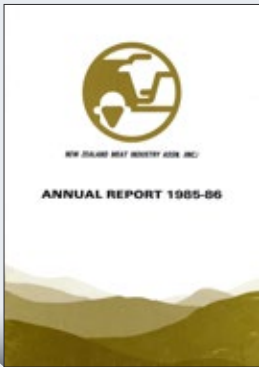
**Nathan Guy**  
MIA Independent Chair



**Sirma Karapeeva**  
MIA Chief Executive

# 40 Years of MIA

**The introduction to the first MIA Annual Report in 1985 noted:**



“When the decision was taken in late 1984 to restructure and rename the New Zealand Freezing Companies Association from 1 July 1985, no one could have foreseen the magnitude of events that the new organization, the New Zealand Meat Industry Association, was to face in its first year. As it transpired the reorganisation was timely; for the first time in the history of the industry, with exporters, processors and marketers all represented in one body, we have been able to present a unified position on many contentious issues.”

That core role of presenting a unified voice remains central to MIA today, even though the environment in which we operate has changed dramatically.

In the mid-1980s, sheep numbers were at their peak, with 70.3 million recorded in 1982 and 1983 – driven by government production subsidies. The 1984/85 season saw record processing volumes of 39.5 million lambs and 9.6 million adult sheep. At the time, sheepmeat dominated exports, mostly in the form of frozen carcasses sent to a handful of markets, particularly the UK and Iran.

The removal of subsidies in 1984 triggered a steady decline in sheep numbers, a trend that has continued through to today. B+LNZ's latest stock survey estimates 23.4 million sheep as at June 2025 – just a third of the national flock 40 years ago. In 2024/25, the industry processed 16.9 million lambs and 3.4 million adult sheep. Rising carcass weights have softened the impact of lower stock numbers on overall production.

Export markets and products have also diversified. Whole carcasses now make up only a small fraction of exports, with New Zealand supplying a much wider range of markets and higher-value cuts. The UK remains important for sheepmeat and is also a growing market for beef.

Another major change highlighted in the 1985 Annual Report was the return of sheepmeat marketing to the private sector after three years of Meat Producer Board

ownership. The report noted this “significantly changed the face of the industry.” Today, sales and marketing sit firmly with individual companies, although MIA continues to support the sector through initiatives such as the Taste Pure Nature origin brand in China.

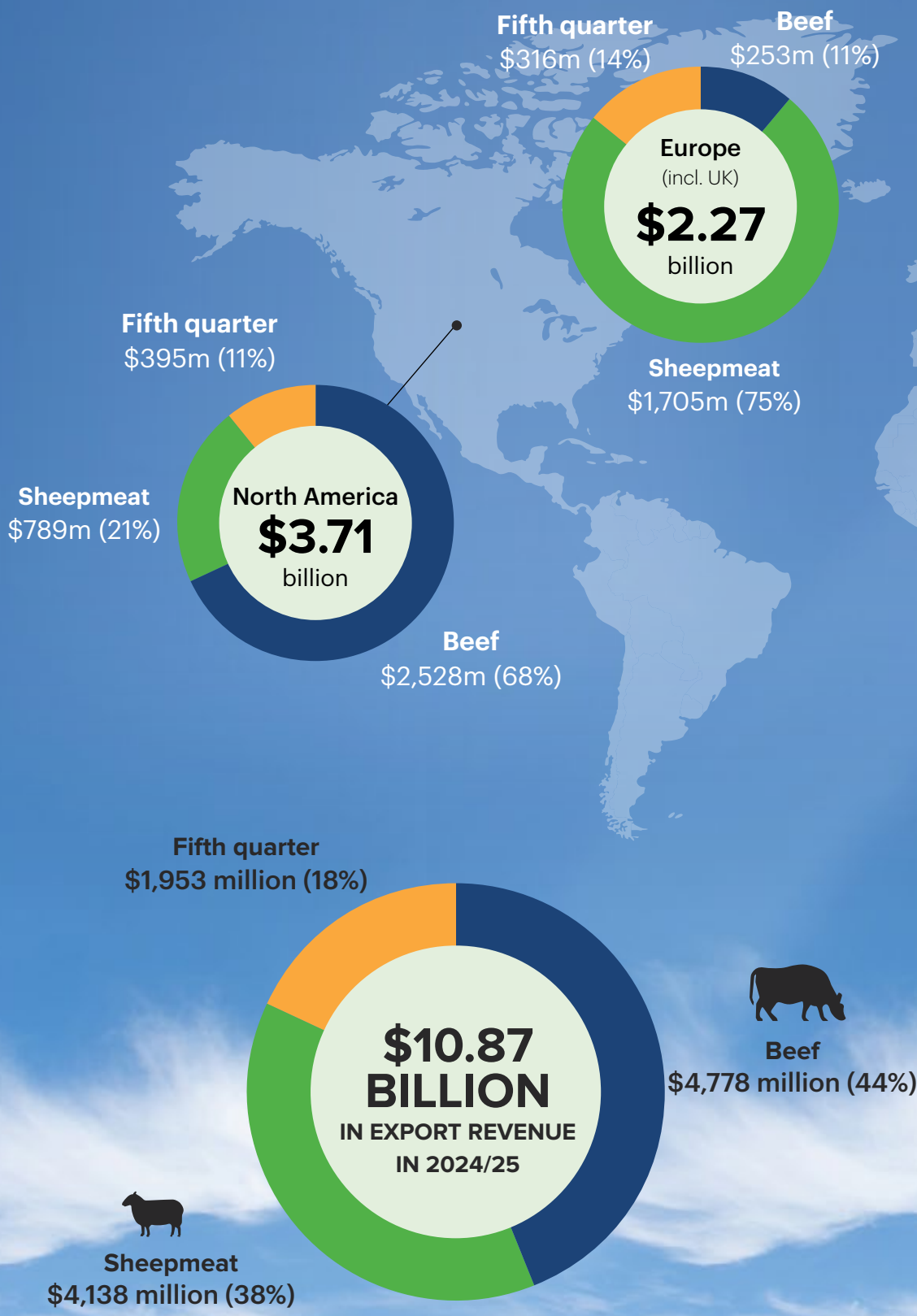
Industrial relations were another major issue in 1985. Negotiations over a new meatworkers' award – shaped by the incoming Labour Government's wage bargaining reforms – led to a seven-month process and a six-week national strike (eight weeks in Auckland). The 1985/86 Annual Report estimated stoppages cost the industry \$100 million in lost wages. By contrast, industrial relations today are much more stable, with MIA's workforce efforts focused on recruitment, training, and skills development.

Wool, briefly noted in the first Annual Report, tells another story of change. In 1985, wool exports (\$1.48 billion) exceeded sheepmeat exports (\$1.15 billion), contributing 35 percent of total sector revenue. By 2024/25, wool accounted for just four percent of revenue – reflecting both reduced sheep numbers and the rise of synthetic fibres in carpets and textiles.

This snapshot shows how much has changed since MIA's first Annual Report. Many other shifts are highlighted throughout this year's report, but one thing is constant: the New Zealand red meat sector continues to adapt, innovate, and drive economic growth for New Zealand.

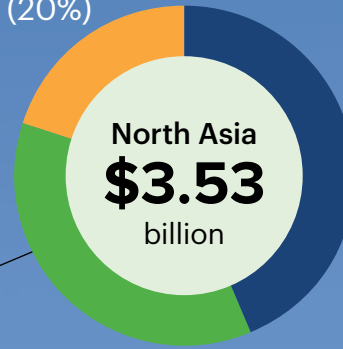


# 2024/25 TRADE OVERVIEW





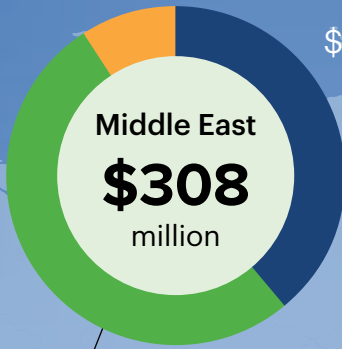
Fifth quarter  
\$704m (20%)



Beef  
\$1,545m (44%)

Sheepmeat  
\$1,278m (36%)

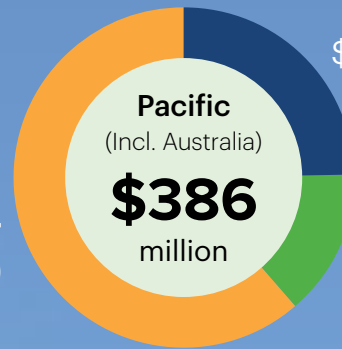
Fifth quarter  
\$28m (9%)



Beef  
\$120m (39%)

Sheepmeat  
\$160m (52%)

Beef  
\$96m (25%)



Fifth quarter  
\$236m (61%)

Sheepmeat  
\$54m (14%)

Fifth quarter  
\$38m (27%)



Beef  
\$207m (40%)

Sheepmeat  
\$77m (15%)

Beef  
\$29m (20%)



Sheepmeat  
\$75m (53%)

Fifth quarter  
\$236m (45%)

South East Asia  
**\$520**  
million

Beef  
\$207m (40%)

Sheepmeat  
\$77m (15%)

Other markets  
**\$142**  
million

Sheepmeat  
\$75m (53%)





## Overall trade

### Exports in 1985

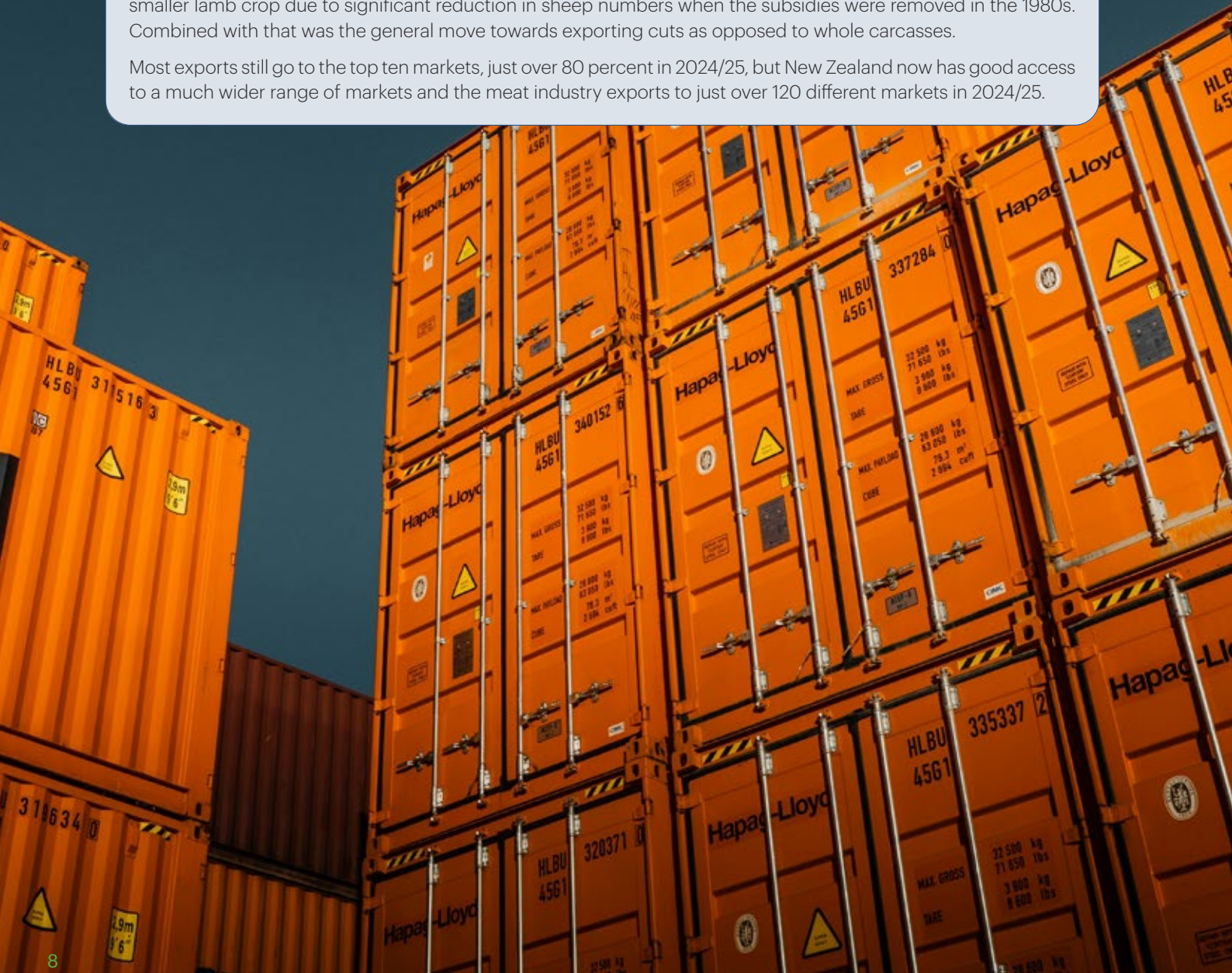
Most red meat exports in 1985 were sent to six markets, the UK, US, Canada, Japan, USSR and Iran, which took 78 percent of exports.

The first four of these markets are still important markets for the meat industry, and although Japan was primarily a market for mutton in 1985, it is now a major beef market.

The USSR, of course, no longer exists, but since 2017 there has not been any beef exports to Russia and no sheepmeat exports since 2022.

Exports to Iran, all sheepmeat, were at their peak in the mid-1980s, but steadily declined and ceased in the mid-1990s. This was partly due to difficulties in agreeing to a new veterinary protocol. New Zealand also had a much smaller lamb crop due to significant reduction in sheep numbers when the subsidies were removed in the 1980s. Combined with that was the general move towards exporting cuts as opposed to whole carcasses.

Most exports still go to the top ten markets, just over 80 percent in 2024/25, but New Zealand now has good access to a much wider range of markets and the meat industry exports to just over 120 different markets in 2024/25.



Red meat and fifth quarter exports were worth \$10.87 billion in 2024/25<sup>1</sup>, which was a 10 percent increase on the previous year.

The United States was the meat industry’s largest market for the year, with exports worth \$3.15 billion, an increase of 19 percent from the previous year.

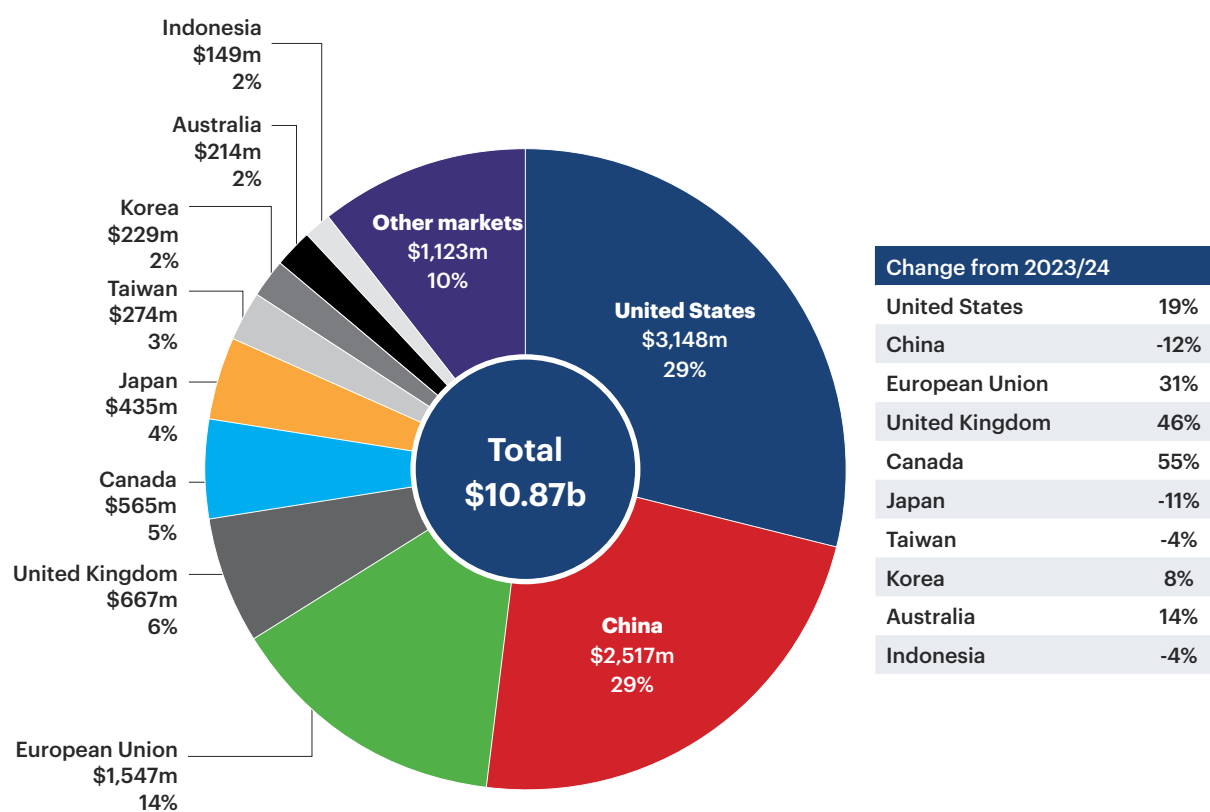
Conditions remained difficult in the industry’s second largest market, China, where exports were down 12 percent to \$2.52 billion, and it was a similar story in other North Asian markets. While exports to Japan recovered last year, in 2024/25 they were down 11 percent to \$435 million and there was a further decline in exports to Taiwan, down four percent to \$274 million.

However, the drop in exports to North Asia was offset by good growth in exports to most other major markets.

Exports to the European Union (EU) were up 31 percent to \$1.55 billion, and there was further recovery in exports to the United Kingdom (UK) from the low levels of 2023, with exports up 46 percent for the year reaching \$667 million.

Canada continued to perform strongly with exports worth \$565 million in 2024/25, up by 55 percent from the previous year.

The increase in overall export value was driven by strong global prices, as the volume of both beef and sheepmeat exports was down on the previous year. This reflected lower domestic production, particularly in the second quarter of 2025.



**Source:** Compiled by MIA from Statistics New Zealand overseas merchandise trade data

<sup>1</sup> Unless otherwise stated, all statistics are for the 12-month period ended 30 June 2025. Wool is not included in the fifth quarter exports as the majority of wool exports are not from MIA member companies.



## Beef

### Beef exports in 1985

By both volume and value beef is now the red meat sector's largest export but in 1985 beef exports were significantly lower than sheepmeat exports.

In 1985, New Zealand exported just over 222,000 tonnes of beef, compared to nearly 500,000 tonnes of sheepmeat and beef exports were worth \$952 million compared to sheepmeat exports of \$1.15 billion (in 1985 dollars).

Similar to 2024/25, the two major beef major markets were the US and Canada. However, exports were much more highly concentrated 40 years ago with 88 percent of beef exports going to North America, compared to 48 percent in 2024/25.

Over the last 40 years, the markets for beef exports have become much more diversified. The major change has been the growth in exports to North Asia, but there are now significant exports of chilled beef to markets such as the UAE and French Polynesia, and the FTAs with the UK and EU has seen growth in beef exports to both those markets.

In 2024/25, beef was the sector's largest export category. While the volume of exports was down by nine percent from the previous year to 464,406 tonnes, strong demand saw the value of exports increase by nine percent to \$4.78 billion for the year.

This was a record value for a June year and was largely driven by demand in North America where tight domestic supplies and continued high consumer demand saw high prices for beef.

While the volume of exports to the US increased by one percent from the previous year, the value grew by 25 percent to \$2.16 billion, a record for the value of annual beef exports to the US.

While the majority of exports to the US consist of frozen 'manufacturing' beef, which gets mixed with trimmings from US cattle for hamburgers, there was also an increase in high-value chilled beef exports. Chilled beef exports to the US were worth \$225 million in 2024/25, and the US

was the industry's largest chilled beef market for the year, with exports nearly double the next largest market, Japan.

Given the demand and high prices for beef in the US, the additional 10 percent tariff introduced by the US Government in early-April, on top of the current tariff of US4.4c/kg, did not have a significant impact on New Zealand exports in the later part of 2024/25. However, the increase of the tariff to 15 percent in August is likely to have a greater impact. New Zealand exporters now face a disadvantage, especially as other major beef exporters to the US, particularly Australia, still have a lower 10 percent tariff.

Canada is currently in a similar situation to the US with very tight domestic beef supply, and at the beginning of 2025, the Canadian national herd dropped to its lowest level since 1988. This has resulted in lower domestic production and an increase in imports.

As a result, Canada was New Zealand's third largest beef market for the year, with exports of 35,252 tonnes worth \$367 million. This represents an increase of 49 percent by volume and 80 percent by value compared to the previous year.

While North America was the major destination for New Zealand beef during the year, there was growth in exports to UK and EU, following the entry into force of FTAs with these two markets in 2023 and 2024 respectively.

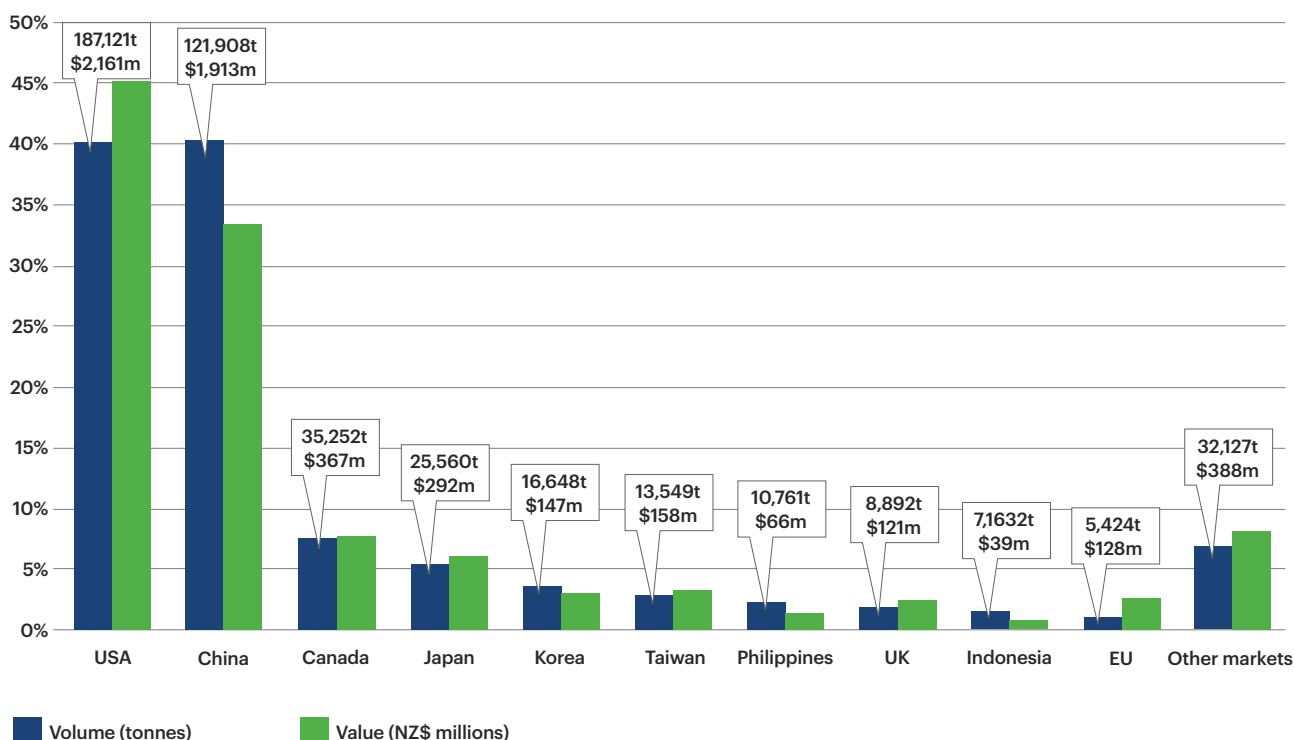
The volume of exports to the UK increased 129 percent to 8,892 tonnes and the value increased 153 percent to \$121 million, while the volume of exports to the EU increased by seven percent to 5,424 tonnes and the value grew by 22 percent to \$128 million. While beef exports to the UK attract no tariffs, under the New Zealand-EU FTA beef exports are still subject to a 7.5 percent tariff.

North Asia accounted for 31 percent of beef exports by value in 2024/25, however export volumes to the region were 20 percent lower than the previous year. The largest decline was in exports to China, where beef exports were down 32 percent by volume to 121,908 tonnes and 28 percent by value to \$913 million.

The decline in China was partly due to difficult economic conditions, but also due to high levels of imports from South America, which totalled more than two million tonnes in 2024/25. The high level of beef imports led the Chinese government to launch a safeguards investigation in late-2024. This is discussed later in the report.

Exports to Japan and Taiwan also down by 11 percent to \$292 million and seven percent to \$158 million respectively, but exports to South Korea recovered by 20 percent to \$147 million.

### Major beef markets in 2024/25





## Sheepmeat exports in 1985

In 1985, sheepmeat was a much more significant component of meat industry exports, with around 50 million animals processed and nearly 500,000 tonnes of sheepmeat exports, compared to 22 million animals processed in 2024/25 and 368,000 tonnes of exports.



More than 75 percent of sheepmeat exports were in carcass form. The photo below shows one of the freezers at Longburn meat works in 1985, where nearly half a million lamb carcasses were being stored before being exported.

In 2024/25, 99 percent of exports are now in the form of further processed cuts.

Another change has been the increase in chilled exports. In 1985, less than one percent of sheepmeat was exported chilled. Logistics challenges in recent years have seen some reduction in chilled exports, but they still accounted for 10 percent of total sheepmeat exports in 2024/25.

The last 40 years have also seen changes in export markets. In 1985, the two largest markets were the UK (153,000 tonnes) and Iran (120,000 tonnes), and these two markets took more than 50 percent of exports for the year.

While the UK is still an important market, the volume of exports in 2024/25 was about one quarter of the volume exported in 1985. New Zealand does not currently export any sheepmeat to Iran.

Another important market in the mid-1980s was the USSR, which took nearly 16,000 tonnes of sheepmeat in 1985, and nearly 45,000 tonnes the year before.

*Ian Cruden and Keith Rose at Longburn Freezing Works - Photograph taken by Ross Giblin. Dominion Post (Newspaper): Photographic negatives and prints of the Evening Post and Dominion newspapers. Ref: EP/1985/3577/16-F. Alexander Turnbull Library, Wellington, New Zealand*

New Zealand exported 368,180 tonnes of sheepmeat in 2024/25, which was five percent less than the previous year.

However, because of a recovery in prices in China and strong demand in other markets, particularly the EU, the value of sheepmeat exports increased by 15 percent to \$4.14 billion, slightly below record levels of 2022/23.

China continues to be the sector’s largest sheepmeat market by volume. While the volume of exports was down 11 percent for the year to 166,816 tonnes, the value was up four percent to \$1.09 billion. This reflected a recovery in prices with the average value of exports increasing from \$5.60/kg in 2023/24 to \$6.54/kg in 2024/25.

The volume of exports to the EU was significantly less than to China, at 65,083 tonnes, but this was still 14 percent higher than last year.

The EU was the most valuable sheepmeat market for the year with a significant increase in the value of exports by 37 percent to \$1.16 billion. This reflects a general increase in the global demand for sheepmeat and tight in-market inventories in the EU, particularly in the first half of 2025.

The UK was the other major market where there was an increase in the volume of exports in 2024/25, albeit a small increase of one percent to 39,297 tonnes. The value of these exports, however, increased by 37 percent to

\$492 million. This was the highest value for sheepmeat exports to the UK since 2016.

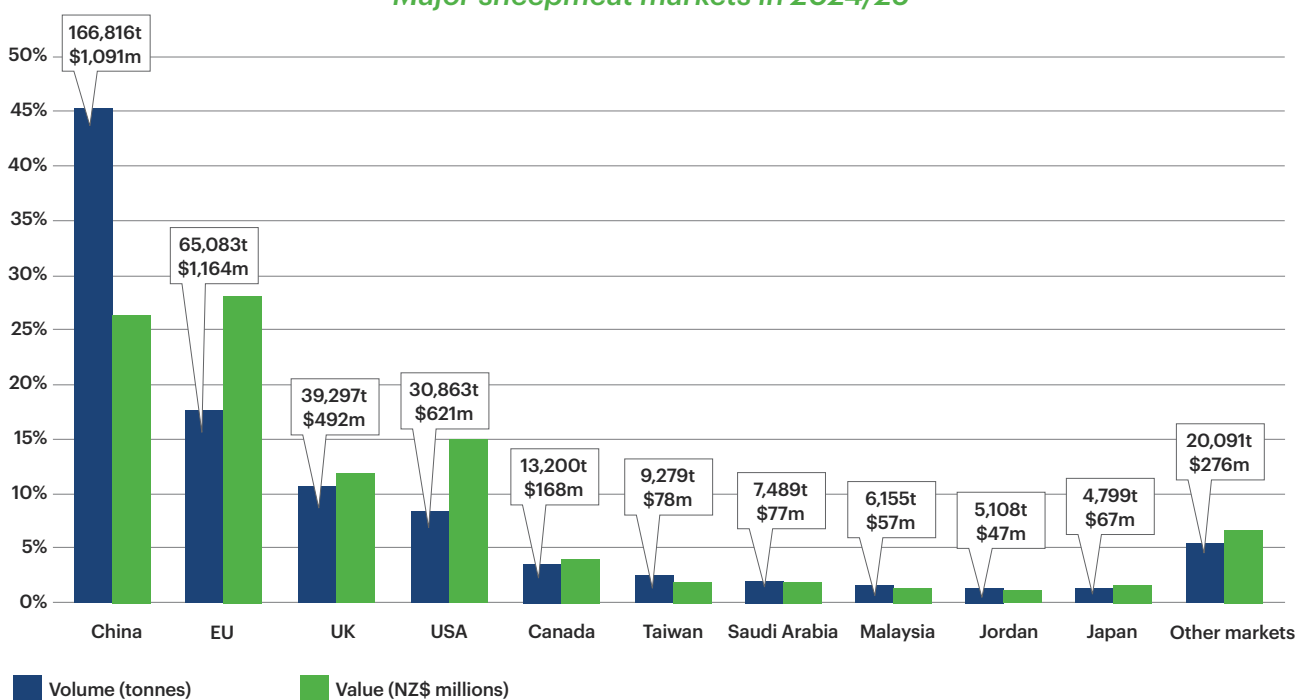
The US continues to be a high value market for New Zealand sheepmeat exports, with an average export value of \$20.12/kg in 2024/25, compared to \$17.88/kg for exports to the EU and \$12.53/kg for exports to the UK during the year. While the volume of exports dropped nine percent to 30,863 tonnes, the value was unchanged from the previous year at \$621 million.

Recent years have seen a steady growth in exports to Canada. The volume of exports was largely unchanged in 2024/25 at 13,200 tonnes, however the value increased by 21 percent to a record \$168 million.

One market where there was growth in both the volume and value of sheepmeat exports in 2024/25 was Malaysia. Exports to this market increased in volume by seven percent to 6,155 tonnes and in value by 29 percent to \$57 million.

As there are currently only five premises approved to export sheepmeat to Malaysia, this is even more impressive. Given the demand in Malaysia, significant work has been underway during the year to update the current export protocols so that more premises can gain approval to export to Malaysia. This work is outlined later in the report.

### Major sheepmeat markets in 2024/25





## Fifth quarter

The fifth quarter refers to all the other parts of an animal that are not meat. These products range from bulk rendered products, such as tallow and meat and bone meal, through to edible offals and high-value ingredients, such as blood products and glands for pharmaceutical use.

While wool contributed \$470 million to the wider sector exports in 2024/25, most wool exports are not from MIA member companies. Therefore, MIA does not cover wool in its fifth quarter data for meat industry exports.

### Fifth quarter exports in 1985

While MIA does not include wool in its fifth quarter export data, it is striking to note the contribution of wool to sector exports in 1985 compared to 2025.

In 1985, wool exports were worth more than sheepmeat exports, and were valued at \$1.48 million compared to sheepmeat exports of \$1.15 million (in 1985 dollars).

Hides and skins made up a large proportion of fifth quarter exports in 1985, and were worth \$344 million (in 1985 dollars) compared to \$244 million in 2024/25.

The vast majority (80 percent) of these exports were sheep skins, but with the reduction in the number of sheep processed over the last 40 years, sheep skins made up 20 percent of exports in 2024/25.

Fifth quarter exports made up 18 percent of meat industry export revenue in 2024/25, and were worth \$1.95 billion, which was one percent higher than the previous year.

### Casings and tripe

This category comprises products from the stomach (tripe) and intestines (casings) of ruminant animals. This was the largest fifth quarter category in 2024/25 with exports worth \$357 million, an increase of three percent from the previous year.

During the year 80 percent of total exports, or \$284 million, went to China. This was a 14 percent increase on the previous year, and can partly be attributed to the improved access to China with more premises updating their listings to add tripe during the year.

As with the previous year, the next two largest markets in 2024/25 were South Korea (\$16 million) and Italy (\$13 million), but exports to both these markets were down slightly due to the increase in exports to China.



## Edible offals

Exports of edible offals such as kidneys, livers and hearts were worth \$354 million, largely unchanged from the previous year.

In recent years, China and Japan have been the major offal markets but in 2024/25 they were overtaken by the US where exports grew 40 percent to \$64 million.

With the growth in exports to the US, exports to China were down six percent to \$62 million and exports to Japan were down 13 percent to \$56 million.

While the US, China and Japan are primarily markets for bovine offals, in 2024/25 the UK and EU were New Zealand's two major ovine offal markets. Overall, offal exports to the UK increased by 24 percent for the year to \$31 million, and 99 percent of these were ovine offals. Exports to the EU grew by 53 percent to \$22 million, and ovine offal made up 63 percent of these exports.

## Blood products and glands

Blood products and glands have a variety of uses including in vaccines, diagnostic kits, and laboratory media.

After a significant growth in exports last year, in 2024/25 exports grew by a more modest two percent to \$276 million. The US remained the largest market with exports worth \$74 million, up by three percent.

The year saw significant growth in exports to the EU, which increased by 62 percent to \$74 million. Within the EU, the majority of these exports went to Denmark. The third largest market for the year was Australia with exports up 16 percent to \$41 million. The one major market where there was a drop in exports was China, down 42 percent to \$38 million.

## Prepared and preserved meat

This category covers meat that has undergone some form of processing before being exported, ranging from raw meat patties that have had ingredients added through to corned beef and other ready-to-eat products, such as cooked lamb shanks.

After dropping in value last year, exports recovered in 2024/25 by 12 percent to be worth \$267 million. The two largest markets remained unchanged, with exports to Australia worth \$128 million and exports to the US worth \$63 million. Exports to these two markets were up by 20 percent and three percent respectively, and between them they accounted for 72 percent of total exports for the year.

The next largest markets were South Korea at \$17 million, Canada at \$9 million, and Japan at \$8 million.

## Hides and skins

As highlighted above, hides and skins accounted for the largest proportion of fifth quarter exports in 1985, apart from wool, and the majority of exports were of ovine skins.

In 2024/25, overall exports were worth \$245 million, and 80 percent of these exports were bovine hides.

Compared to the previous year, overall exports in hides and skins were down six percent, and largest market was the EU with exports worth \$98 million. Nearly all of these exports were bovine hides and this trade will be impacted by the EU Deforestation-free supply chain Regulation (EUDR) (which is detailed in the market access section of the report).

China was the next largest market with exports worth \$92 million in 2024/25, which were more evenly split between bovine hides and ovine skins.

The EU and China accounted for 78 percent of exports during the year, and the next largest markets were Australia at \$17 million, Viet Nam at \$14 million and Indonesia at \$8 million.

## Petfood

Exports of petfood made from meat were down by 19 percent from last year to \$62 million. Exports to China were down 30 percent to \$25 million, exports to the US were down by 26 percent to \$13 million and exports to Japan were down by 13 percent to \$3 million. These decreases were only partly offset by growth in exports to Australia, which were up 32 percent to \$10 million and to Taiwan which were up 40 percent to \$3 million.

## Rendered products

This category comprises meat and bone meal (MBM) and tallow. MBM is used mostly as a feed ingredient for non-ruminant animals and while tallow has a variety of uses, in recent years the bulk of New Zealand's tallow exports have been going into bio-fuel manufacturing.

### Tallow

In 2024/25, the value of tallow exports increased by 28 percent to \$218 million.

The US and Singapore are the two major markets for tallow. In recent years, exports have shifted between the two markets depending on demand and pricing. In 2024/25, the US was the largest market with exports up 73 percent to \$126 million. Conversely, exports to Singapore decreased 37 percent to \$52 million.

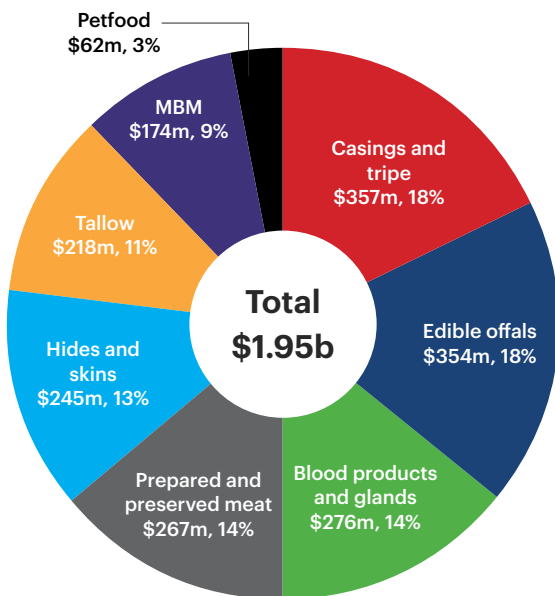
While the majority of exports, 82 percent, went to those two markets, there was an increase in tallow exports to other markets during the year. These include Malaysia with \$20 million, Canada with \$6 million and the Philippines with \$5 million.

### MBM

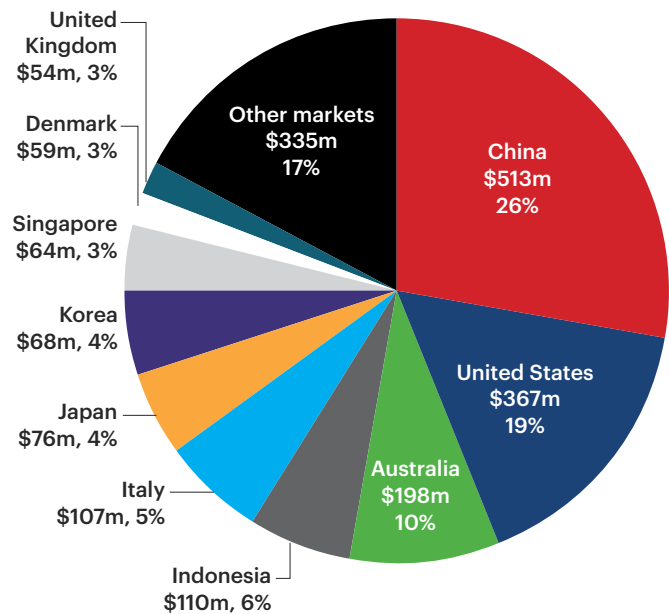
In contrast to tallow, exports of MBM decreased by 15 percent in 2024/25 to \$174 million.

This was mainly due to a drop in exports to the largest MBM market, Indonesia, where exports were down 13 percent to \$82 million. While exports to Indonesia are primarily bovine meal for use as an ingredient in aquafeed, the next two largest markets, the US and EU, mostly take ovine meal for use as an ingredient in petfood. Exports to these two markets increased slightly in 2024/25 with the US up five percent to \$30 million and exports to the EU up three percent to \$20 million.

Fifth quarter exports by value in 2024/25



Top 10 markets for fifth quarter exports in 2024/25



# Red Meat Sector Strategy

The Red Meat Sector Strategy (RMSS) launched in December 2020 laid the foundation for the new recently released *Our Pathway to Growing Value Action Plan*. Working with B+LNZ, this plan outlays how the two organisations are working together and with other key stakeholders and the government to drive innovation and increase value within the sector.

With a vision to create a high-value, resilient red meat sector that thrives through change by seizing every opportunity to

deliver greater value across the supply chain, Our Pathway to Growing Value Action Plan builds on the RMSS to ensure long-term profitability and resilience for red meat processors and farmers.

The following sections in the report highlight the range of work and initiatives that MIA has been progressing during the year under the three current strategic priorities of the RMSS: Market Position, Innovation, and Sustainability.

## Our Pathway to Growing Value Action Plan



**VISION** – Creating a high-value, resilient red meat sector that thrives through change by seizing every opportunity to deliver greater value across the supply chain



**GOAL** – Ensure long-term profitability and resilience for meat processors and farmers through sustainable practices and value chain efficiency

<b>PRIORITY AREAS</b>	<b>OUTCOMES</b>			<b>KEY ENABLERS</b>	
<b>Enhancing On-Farm Productivity</b> Unlocking productivity gains at the farm gate	<b>Higher farm productivity and profitability</b>  Sector's low environmental footprint is recognised and acknowledged with fit-for-purpose regulation settings to provide for headroom and support growth	<b>Taste Pure Nature preference measures</b>  Export revenue increased  Streamlined regulatory settings support ease of trade  Enhanced product diversification	<b>Non-Tariff Barriers have reduced</b>  Trade is maintained in key markets  Risk of trade impediments is reduced	<b>Food Safety</b>  World leading food safety standards and regulatory settings to maintain New Zealand's reputation as a producer and exporter of safe, high quality food, and to maintain customer confidence	<b>Innovation</b>  Value of our products is supported by substantiated attributes and credentials  Productivity and efficiency is enabled by R&D, innovation and automation
<b>Spotlight on China</b> Amplifying our first mover advantage		<b>Tariff costs are reduced as industry takes advantage of tariff free access</b>  Market share growth to support market diversification  New products add value to the whole animal			
<b>Address Non-Tariff Barriers</b> Removing costs to add further value	<b>Increased revenue from sales of new products</b>	<b>Tariff costs are reduced as industry takes advantage of tariff free access</b>  Market share growth to support market diversification  New products add value to the whole animal	<b>Innovation is unlocked</b>  Migrant and sector labour capacity increased  Economic contribution increased  Environmental KPIs are reasonable and fit-for-purpose	<b>Collaboration</b>  Working sector-wide, cross-sector, and with Government to build strong relationships and understandings  Co-investment on key priorities	<b>World Class Farmers</b>  Supporting farmers to deliver world-class performance on-farm now and into the future
<b>Leverage Market Opportunities</b> Growing value by developing new revenue streams					
<b>Enabling Domestic Settings</b> Regulation to support productivity, efficiency and growth					
<b>Creating Value From the Carcass</b> Exploring opportunities for new products	<b>Increased revenue from sales of new products</b>	<b>Tariff costs are reduced as industry takes advantage of tariff free access</b>  Market share growth to support market diversification  New products add value to the whole animal	<b>Innovation is unlocked</b>  Migrant and sector labour capacity increased  Economic contribution increased  Environmental KPIs are reasonable and fit-for-purpose	<b>Collaboration</b>  Working sector-wide, cross-sector, and with Government to build strong relationships and understandings  Co-investment on key priorities	<b>World Class Farmers</b>  Supporting farmers to deliver world-class performance on-farm now and into the future



# Taste Pure Nature

## Marketing in 1985

Today, sales and marketing sit firmly with individual companies, although MIA supports the sector through initiatives such as the Taste Pure Nature origin brand in China.

However, the introduction to the first MIA annual report noted that one of the events during 1985 that *“changed significantly the face of the industry”* was the return of sheepmeat marketing to the private sector after a three-year period of Meat Producer Board ownership and control.

The official announcement of this was made on 8 November 1985, with the date of return only six weeks later on 21 December 1985. The second MIA annual report for 1986/87 set out that:

*“Many of the Association’s activities over the past 12 months have been directed towards establishing a workable system of orderly marketing for lamb in the spirit of the undertaking given to the Government relinquished control in December 1985.”*

Taste Pure Nature (TPN) was developed by B+LNZ in 2019, a beef and sheepmeat marketing campaign designed to increase awareness of New Zealand farming conditions, leading to premium beef and sheepmeat products. In 2020, the campaign expanded into China. B+LNZ did a great job with the TPN campaign.

In October 2024, MIA took on the leadership of TPN, with both organisations agreeing that the campaign needed to take a company-driven and market-focused approach that aligns with and supports MIA members in-market activities in China. Both MIA and B+LNZ agreed to invest \$2 million each into the second phase. In November, at the annual China International Import Expo (CIIE) in Shanghai, it was announced by Minister of Trade and Investment, and Agriculture Hon Todd McClay that the government would also co-fund the initiative.

As part of the new Red Meat Country of Origin Programme, which also investigates market value for grass-fed, nutrition label claims, and traceability, TPN Phase II is a three-year pilot that is taking a more targeted approach,

focused on Shanghai. The campaign is led by MIA with guidance from the Marketing Managers Advisory Group, a group of marketing managers from MIA’s members. It is overseen by a Programme Governance Group made up of funding parties, with an independent chair.

It is well-understood that Chinese consumers prefer grain-fed red meat, which has long been seen as superior to grass-fed. The aim of this new programme is to increase the awareness of New Zealand’s grass-fed, naturally nutritious red meat products by using key opinion leaders, social and mainstream media marketing campaigns and by establishing a pre-competitive umbrella brand that supports individual meat companies’ in-market activity. Throughout the three-year pilot the value attributed to the TPN brand and claims relating to grass-fed, nutrition and traceability will be monitored and tested to ensure activities are insight-led and resonate with Chinese customers and consumers.

Recognising the saturated, claim-heavy nature of the Chinese market, this strategy emphasises brand salience, emotional storytelling, and cultural connection. By building consumer loyalty and advocacy, it is intended that this demand will filter through to customer requests and deliver more value to MIA members, and sheep and beef farmers.

## A Year of Relaunch and Renewal

Following the transition of leadership for the TPN brand, MIA began working with the Marketing Managers Advisory Group to reposition the brand, rebuild key market infrastructure, and reintroduced TPN to Chinese consumers with three key events:

1. Government announcement of co-funding at CIIE in November 2024
2. Chinese New Year Campaign in January 2025
3. The official TPN relaunch in June 2025 on the Prime Minister's Business Delegation to China

To guide the relaunch strategy, MIA commissioned a User & Attitude Segmentation study in Shanghai. This research is set to unveil detailed consumer segments, their relative potential, and key gaps and opportunity spaces where the brand can grow. It will provide clarity on how to align brand messaging with consumer expectations and drive relevance across diverse demographic and psychographic profiles.

Early results affirm the brand's strong perception in terms of trust and grass-fed differentiation, while also highlighting areas requiring further investment — particularly in visibility and emotional resonance. These combined insights are now shaping the next phase of TPN's market development strategy.

To support the value of the TPN brand, key systems are being upgraded to support scale and brand consistency. MIA is working on a brand licensing framework to strengthen brand governance through a structured authorisation process for market partners. Once approved by the Marketing Managers Advisory Group and the Programme Governance Group, the system will uphold brand integrity and support strategic collaboration across the value chain.

In parallel, updated digital and print marketing assets have been developed to reflect the refreshed brand identity. Social media channels have undergone renewal to enable more contemporary storytelling and improve audience engagement across key digital platforms.

With the relaunch complete and early momentum underway, the next year will focus on expanding TPN's presence across retail, foodservice, and digital platforms. Priority will be placed on building consumer loyalty and advocacy through consistent, culturally resonant storytelling.





# SENDING NEW ZEALAND EXPORTS TO THE WORLD

## Advocacy

Advocacy efforts over the last year have focused on educating policy decision makers on the nuances of the red meat sector, specifically red meat processing and exports.

MIA's advocacy efforts are underpinned by strong relationships with other agencies in the wider pastoral sector and other industry bodies, with whom we often partner and engage with on key policy matters. MIA enjoys strong relationships with senior government officials, ministers, and Members of Parliament.

In addition to the Red Meat Sector Conference, attended by approximately 300 senior leaders and people from across the sector and government, MIA's annual cocktail event brings together Wellington's movers and shakers, providing members an opportunity to engage directly with key stakeholders on a range of matters.

MIA regularly supports and speaks at conferences around the country on a range of topics and issues that impact the sector, highlighting the socioeconomic importance the sector has on New Zealand's wellbeing and economy.

MIA is involved in several formal and informal working groups that come together to influence government policy to ensure better outcomes for all. Over the last year, MIA's advocacy work has been focused on the following areas:

- Meat processing work force capacity and capability, including migrant worker policy settings
- The environment
- Reducing operational costs and increasing value for processors and exporters
- Energy infrastructure
- Gene technology

During the year, MIA made submissions on a wide range of government policy and legislation covering the following areas of strategic focus:

### Biosecurity



- Proposed amendments to the Biosecurity Act
- NAIT Operations Plan
- Biosecurity Action Plan 2025
- Review of the Biosecurity (Meat and Food Waste for Pigs) Regulations 2005
- Proposed amendments to the Animal Status Declaration Form

### Environment



- New Zealand's second emissions reduction plan (2026–30)
- Gene Technology Bill
- Feedback on Proposed Phase-out of PVC, PVdC and Rigid Polystyrene

### Food Safety



- Agricultural and Horticultural Products Regulatory Review
- Proposed Amendments to the Agricultural Compounds and Veterinary Medicines Act 1997
- Proposed Amendments to ACVM Regulations

### Government Policy and Regulation



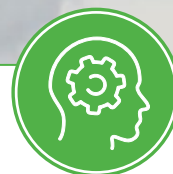
- Taxation and the not-for-profit sector
- Regulatory Standards Bill
- Proposed changes to MPI's cost recovery settings
- RMA reform consultation

### Innovation



- Science System Advisory Group – Phase 1 and Phase 2 Consultation

### People and Skills



- Vocational education and training system redesign
- Options for the Future of Work-based Learning
- Education and Training (Vocational Education and Training System) Amendment Bill
- Consultation on Industry Skills Boards' coverage
- The future of occupation classifications in Aotearoa New Zealand
- Design options for seasonal visas

### Trade and Market Access



- Submission on a proposed Open Plurilateral Arrangement for non-tariff barriers
- Free Trade Agreement between New Zealand and India





# Red Meat Sector Conference

2025

## Red Meat Sector Conference

In July 2025, almost 300 people attended the Red Meat Sector Conference (RMSC) in Christchurch. MIA extends its thanks to the sponsors who helped make the event possible and everyone who took the time out of their busy schedule to attend.

Given the current environment it is unsurprising there was a large focus on the global meat markets and especially the sweeping tariff announcements out of the US.

We had some returning speakers from previous years and some new faces and topics to pique interest and kick start conversations on trade, co-products innovation, on-farm productivity and marketing.

MIA and B+LNZ chairs Nathan Guy and Kate Acland kicked off the conference, sharing their views of the sector and vision for the future with the release of the biennial Barriers to International Trade report and the new action plan to increase export value *Our Pathway to Growing Value*.

Partnership sponsor B+LNZ's session featured Simon Quilty and Brett Stuart, co-founders of market intelligence and analysis company Global AgriTrends advised attendees that the market has not yet peaked, and they expect global beef and sheepmeat prices to continue to increase over the coming years as tight global supplies affect value.

The conference provided an opportunity for the sector to hear directly from ministers with key portfolios that influence the sector. This year two ministers spoke to attendees: Hon Todd McClay, Minister of Trade and Investment, Agriculture, Forestry and Associate Minister

of Foreign Affairs and Trade, and Hon Nicola Grigg, Minister of State for Trade and Investment, Minister for Women, Associate Minister of Agriculture and of ACC.

The government was further represented with speeches from Vangelis Vitalis, the Ministry of Foreign Affairs and Trade (MFAT) Deputy Secretary Trade and Economic, and MPI Chief Science Adviser Dr. John Roche, who was also recently appointed as the Prime Minister's new Chief Science Adviser.

Both Vangelis and John provided insights into how their work can help to support the sector to innovate and grow, with Vangelis talking to *The Emerging Trade Landscape and Keys to Success*, and John giving his view on *Enhancing On-Farm Productivity Through Innovation*.

Grahame Morton, MFAT's Deputy Secretary Asia and Americas and until February, the Ambassador to China, also made an appearance on the *Spotlight on China* panel alongside MIA's Chief Executive, Sirma Karapeeva, and Jiao Jiao Chen, Chief Executive of Grand Farms in a discussion about the opportunities and learnings from the China market for red meat products.

A panel on the opportunities and challenges in the co-product space was facilitated by Max Kennedy of Biolighthouse Ltd, helping our panelists Nicola O'Rourke from Joy Consulting, John Morgan from the New Zealand Food Innovation Network, and Nicky Solomon from Bioresource Processing Alliance navigate the complexity of this area. With a shallow investment pool in New Zealand, they encouraged companies to work together in the pre-competitive space to drive technology and innovation in this area.



A key emerging issue for red meat producers and exporters is the implementation of the European Union’s Deforestation Regulation. Matt Lythe, Managing Director of PRISM Earth, has been working with MIA for more than 12 months now to help exporters prepare for the implementation of this regulation. Matt presented conference attendees with the sector’s solution, identifying what we have all known—that New Zealand does not have a deforestation issue. In fact, of all the sheep and beef farms in New Zealand, only 24 farms have been identified as meeting the EU’s definition of deforested land. This is great news for the sector and ensures this market remains accessible for New Zealand’s exports, worth \$200 million each year.



Breakout sessions this year focused on nutritional information and how that is relevant for exporting companies, what is in the AgriZeroNZ pipeline for Kiwi farmers, customer segmentation of New Zealand meat eaters, and how gene technology can unlock potential and shape the future of sheep and beef farming.



The day was rounded off with three MIA scholars shared their visions for the sector and its future leaders, ending the day as we began—with a note of positivity and looking forward to the future.

**We are deeply grateful to all our sponsors who make this event possible. This year we ran an early bird prize with Mike Smith from Kotahi taking away an Honest Wolf Weekender bag – made with 100 per cent Papanui Estate Wool.**



*Mike Smith from Kotahi accepting the early bird prize*

We look forward to seeing you in 2026 when we return to Wellington to capture politicians as they head into campaign mode ahead of the General Election.

# Market Access

## Market Access in 1985

The market access landscape was significantly different in 1985 than it is today.

New Zealand had only just signed its first comprehensive Free Trade Agreement (FTA), the New Zealand-Australia Closer Economic Relations (CER), and while New Zealand had a degree of preferential access to key markets in Europe and North America, this access was not comprehensive.

In Europe, New Zealand did have access for around 250,000 tonnes of sheepmeat into the EU, but these exports were subject to a 10 percent tariff.

In North America, imports of beef into the US were subject to “voluntary restraint” agreements, where New Zealand and other suppliers agree to restrict the quantity of meat shipped to the US during the calendar year to a negotiated tonnage if the global estimate of US imports exceeds a “trigger” level. No restraints were required in 1985 although, at 181,000 tonnes, final imports were very close to the “trigger”.

In 1985, the Canadian Government introduced quotas on beef imports following a significant increase in EU exports of subsidised beef to Canada the previous year, and New Zealand was allocated 28 800 tonnes. This quota (and the out-of-quota rate) was finally removed in 2023 under CPTPP.

Since then, New Zealand has gained substantial quotas for sheepmeat into the EU and for beef into the US through negotiations at the WTO, and thanks to the efforts of successive governments around 65 percent of meat industry exports are now covered by a comprehensive network of FTAs.

## China

### Listings in China Import Food Enterprises Registration (CIFER)

In 2023, the General Administration of Customs for China (GACC) introduced its online registration platform, CIFER. As noted in the previous annual report, activity has moved from registering in CIFER to modifying listings to update information and add new products. Following audits conducted the previous year, over 2024/25 GACC continued to approve modifications to existing listings in CIFER. The system is performing as expected, and ongoing support from MPI has been crucial for successfully registering new premises and new products for China.

### Meat Hygiene Cooperation Programme

The Meat Hygiene Cooperation Programme between New Zealand and China gained significant traction over the past year, following the formal signing of the Terms of Reference (TOR) for the Meat Hygiene Experts Group (MHEG) during the Joint Advisory Panel (JAP) meeting held in Wellington in November 2024. This milestone marked the formal establishment of a multi-year cooperation framework between MPI and China's Ministry of Agriculture and Rural Affairs (MARA), with strong support from MIA and industry partners.

Planning has since focused on delivering a re-familiarisation visit to New Zealand by MARA MHEG officials, which will serve as the launchpad for deeper technical engagement.

In preparation, MIA has actively engaged with MPI and New Zealand MHEG members to shape the agenda and identify areas of shared interest. MARA has expressed interest in a broad range of topics, including New Zealand's quality assurance systems, biosecurity and pathogen monitoring, traceability, government support policies, meat inspection, and slaughtering technology.

In parallel, MIA is preparing for New Zealand's participation in the China International Meat Industry Exhibition (CIMIE) in September 2025. A technical workshop is being planned as part of efforts to sustain momentum and showcase New Zealand's commitment to this flagship bilateral initiative.



### Beef safeguard investigation

On 27 December 2024, China’s Ministry of Commerce (MOFCOM) Trade Remedy Investigation Bureau announced a safeguard investigation on global beef imports. The announcement followed a petition by the China Animal Agriculture Association (CAAA) and nine provincial animal agriculture associations which claim that the sharp rise in beef imports from 2019 to the first half of 2024 has injured China’s domestic industry. The safeguard investigation covered all global imports of beef, and the main sources of this trade for China are Brazil, Argentina, Uruguay, Australia, New Zealand, and the United States.

MIA registered as an interested party, acting on behalf of its members. The investigation process involved submitting information to MOFCOM, presenting New Zealand’s argument in person, and hosting a delegation to visit New Zealand to further understand the beef supply chain. MIA was supported by B+LNZ, as well as by MFAT, MPI and the Ministry of Business, Innovation and Employment (MBIE).

In its submissions on behalf of the industry, MIA outlines the case for why New Zealand beef imports into China are not injurious to the domestic industry, and so should be exempt from the investigation and from any safeguard measures imposed. The key arguments are:

- Imports from New Zealand have remained relatively consistent

- The proportion of beef from New Zealand to China has consistently been small
- New Zealand’s beef production is not expected to expand substantially
- New Zealand’s beef industry responds to market signals
- Other factors may play a role in the increase in beef imports
- New Zealand and China’s trade relationship is long-standing complementary and mutually beneficial

MOFCOM was due to release its findings in late July 2025 but announced in August that because of the complexity of the case it has extended the investigation period until the end of November 2025.

### Visits - CIIE, PM delegation

Over the year, MIA has continued its in-market visits to this crucial market, including:

- Chair and CEO leading delegation to CIIE in November 2024
- MIA CEO engaging in-market on TPN in September 2024 and in May 2025
- The MIA CEO attending safeguard hearings in March 2025
- The MIA Chair being part of the Prime Minister’s delegation to China in May 2025



## United States

Following the election on 5 November 2024, the US Administration has led a flurry of activity domestically and internationally. Campaign promises on trade in particular were executed with some haste and then withdrawn or amended equally as abruptly. A campaign promise on a universal tariff was realised on 2 April 2025 when the Administration announced that an additional 10 percent tariff would be applied to nearly all goods entering the US. In addition, higher rates on top of that would be applied to goods from select countries. However, that was suspended for 90 days until 9 July 2025. All New Zealand goods exports faced a 10 percent tariff on top of current tariffs.

For beef and sheepmeat exports to the US, this meant a 10 percent tariff on top of the current tariffs for beef (US 4.4c/kg), lamb (US 0.7c/kg), and mutton (US 2.8c/kg). Despite the tariff, trade in beef continued at high levels, meeting increased demand in the market, but also reflecting the integral nature of New Zealand lean beef into the US supply chain. Sheepmeat exports remained steady.

During the 90-day “pause” on reciprocal tariffs, the US entered into discussions with trading partners to reach “deals”. The ambitious goal to reach “90 deals in 90 days” was not realised with “deals” only reached with the UK and China, and negotiations continuing with the EU, Vietnam, and India. The implementation of these agreements is still pending and unclear given they are not treaty-level agreements. The 90-day “pause” on reciprocal tariffs for all countries except China came to an end on 9 July but was extended to 1 August, and then extended again to November. Negotiations with trading partners continue.

In early August, the US Administration further modified the reciprocal tariffs announced in April, and the tariff on New Zealand imports was increased to 15 percent on top of the current tariffs. The implications of this for

New Zealand red meat exports are still unclear. While other major beef exporters such as Brazil now face significantly higher tariffs of up to 50 percent, the tariff on imports from Australia has stayed at 10 percent, providing Australian exporters with an advantage into the US.

### **Shiga toxin-producing E. coli (STEC) management work programme**

Following the joint industry-MPI senior technical delegation led by the MIA CEO to the US, progress has been made on the STEC management work programme. US authorities consider some serotypes of STEC to be an adulterant in raw beef products and therefore implement strict criteria surrounding STEC management in beef, something which New Zealand takes very seriously to ensure it can continue to service this very important market.

While STEC prevalence in New Zealand beef is low the industry has focused on continuous improvement of management practices, focusing on best hygienic preventative practices, new technologies and antimicrobial interventions where appropriate.

A significant component of this work programme has seen the introduction of changes to how companies and MPI respond to the random low-level detections of top seven STEC strains in adult beef within a specific season. The goal of these changes is to facilitate ongoing trade with the US while also recognising measures taken by companies to continuously improve microbiological performance.

### **Other developments**

The US undertook a systems-based audit in late-January to mid-February 2025. The audit focused on a sample of meat establishments, recognised laboratories, and MPI regional offices. The audit went well with few site-specific and national issues raised.

## European Union

### EU deforestation-free supply chain regulation (EUDR)

The EUDR requires products being placed on the EU market that are linked to global deforestation to be accompanied by a due diligence statement (DDS). Enforcement of the EUDR begins on 30 December 2025 after being delayed by 12 months. For the last year, industry has been preparing for compliance to enable continued access to the high value EU market.

Products in scope of the EUDR include cattle and cattle-derived products. The obligation for compliance is on those who place those products on the market, or exports them from the EU (“the operator” or “the trader”). In most cases for New Zealand exporters, the onus will be on their importer to comply with the EUDR.

The DDS needs to include information on the country of production, and the geolocation of all the plots of land where the commodities are produced. For cattle and cattle-derived products, the geolocation of all establishments where the cattle were kept from birth to slaughter.

The EUDR categorises countries into high-, standard-, or low-risk. The majority of countries, including New Zealand, are in the low-risk category. This means they are subject to a “simplified due diligence” process (i.e. submitting the DDS as described above), and checks by competent authorities are less frequent.

New Zealand does not have a deforestation issue, and MIA has consistently advocated for New Zealand’s exemption from this onerous and complex regulation. Over the last year, MIA has engaged with New Zealand

and EU officials calling for recognition of New Zealand’s strong environmental credentials and its management of its land resources and forestry system.

In parallel, MIA has worked on finding an industry-wide solution for compliance for its affected members. It has worked with earth observation technology specialists Prism Earth and Lynker Analytics to develop a deforestation monitoring system that will enable meat importers to ensure all beef and leather products arriving in the EU from New Zealand are deforestation free. This required analysis of forest loss between the present day and December 2020 across more than 10 million hectares of grazing land.

By using and independently verifying medium resolution satellite imagery to detect forest canopy changes in half hectare areas across grazing land, and intersecting that cattle movement data from OSPRI, exporters can use that information to generate the DDS required by the EUDR. Processors receive reports of affected animals. This is modelled on the monitoring of HGP (hormone growth promotants). Animals that are on that list have been flagged as crossing deforested areas, and so could be separated off or marked as such by the processors.

It is a verifiable and auditable approach that can be flexible to use for other similar requirements.

MIA members will have access to a portal, managed by Prism, which shows all farms (based on NAIT numbers) that have been mapped and classified. No identifying information is provided (i.e. no names, supplier information, or private identifying features).

## FTA updates

Two agreements in the Middle East will provide opportunities in this part of the world. In October 2024, an FTA with the Gulf Cooperation Council (GCC) was concluded. Once in force, all tariffs on New Zealand’s red meat exports to the GCC will be eliminated within 10 years. In addition, the FTA provides avenues for engagement on Halal through the Trade and Food Products Committee. The FTA is undergoing legal verification for preparation for signature by both parties.

In January 2025, the Comprehensive Economic Partnership Agreement (CEPA) was signed with the United Arab Emirates (UAE). Once in force, frozen

New Zealand red meat and other fifth quarter products can be exported to the UAE tariff-free. Chilled products are already tariff-free. The CEPA entered into force in late August 2025.

New Zealand also launched FTA negotiations with India in March 2025. MIA advocates for a comprehensive, commercially meaningful, high-quality agreement, including measures to address NTBs and the complete elimination of all tariffs within a reasonable period. Negotiations continue. India is a market with great potential for the red meat sector for sheepmeat as well as the fifth quarter.



## Halal market access

Halal processing is a core component of the meat industry's business model as it allows companies to supply cuts from every carcass to both Muslim and non-Muslim customers around the world. In 2024/25, Halal-certified exports made up 38 percent of total red meat and edible fifth quarter exports, and were exported to 73 markets. These exports were worth approximately \$3.4 billion for the year.

Previous MIA annual reports have highlighted that the lack of an international standard for Halal processing and trade creates additional costs and challenges for the industry and for New Zealand's certification bodies in complying with the different standards in key Halal markets.

While agreement on a global Halal standard is unlikely anytime soon, during the year there has been progress in improving the recognition of New Zealand's Halal regulatory framework in key Muslim markets.

### Gulf Cooperation Council (GCC)

While the GCC FTA and the UAE CEPA agreements do not specifically recognise New Zealand's Halal regulatory framework, they both include mechanisms for discussion and cooperation on Halal matters.

This is a positive step as the GCC is a market that takes more than \$200 million in red meat exports annually, but where differing Halal requirements within the GCC countries can create challenges.

### Malaysia

As noted in the trade overview Malaysia is a significant export market, particularly for sheepmeat, despite having only a small number of premises approved to export to the market. During the year, there has been significant work undertaken to update the export requirements for Malaysia that have largely been unchanged since 2011. This work was an important step to increase access to the market

MIA is hopeful that an audit visit by Malaysia authorities will take place in the near future so that companies can make the most of the opportunities in the market.

### Indonesia

In mid-June, MPI signed a Halal Cooperation Arrangement with the Indonesian Halal authority BPJPH.

While the arrangement does not provide for full equivalence of the New Zealand Halal regulatory framework with Indonesia's Halal requirements, it does see Indonesia recognise the New Zealand system and provides a precedent for discussions with other Muslim markets.

## Barriers to Trade

In July 2025, MIA in conjunction with B+LNZ released the biennial Barriers to International Trade report, which provides an overview of the red meat sector trade and barriers that the sector faces in international markets.

The report highlights that non-tariff trade barriers (NTBs) cost the red meat sector an estimated \$1.5 billion every year. It also shows that while tariff rates have been steadily decreasing under New Zealand's network of FTAs, the sector still faced tariff costs of nearly \$155 million in 2024.

The report is available on the [MIA website](#).

### New Zealand Sheep and Beef Sector BARRIERS TO INTERNATIONAL TRADE



Prepared by Beef + Lamb New Zealand and the Meat Industry Association





**INNOVATION**

Innovation is a pillar of MIA's work programme, where investment is made on behalf of industry to generate solutions for issues of common interest to processors. Science and technology have the power to unlock value for processors and consumers, grow the sector's reputation as providers of safe, high quality, nutritious food and improve sustainability and profitability. The meat processing industry has a strong record of investment in science and technology, and this collaborative investment has produced many innovative approaches and methods to maintain the sector's competitive edge in global markets

### **Innovation in 1985**

In 1985 the Meat Industry Research Institute of New Zealand (MIRINZ) was the backbone of research and development for the meat processing industry. MIRINZ was established in 1955, and by the mid-1980s was recognised around the world for its innovations in both meat science and processing technology. Techniques developed at MIRINZ in that era are still important in today's processing operations, including accelerated aging and conditioning of carcasses (AC&A), inverted dressing of lambs, low temperature rendering (MLTR) and vacuum and controlled atmosphere (CAP-tech) packaging crucial for underpinning the shelf-life necessary for the export of chilled meat by sea.

MIRINZ was disestablished in 1999, and the science functions of the organisation sold to AgResearch who completed a small number of strategic projects before MIRINZ-AgResearch closed for good in 2010. This ended over 50-years of strategic investment in meat processing that significantly advanced our understanding of the properties of meat, quality and safety and the development of new processing technology, building the foundation of modern meat processing in New Zealand.

Since that time innovation activities have continued, directly funded by the processing companies themselves, often in collaboration with the Government, to push initiatives that will have impact for all processors. While today's investments are significant, few modern developments have had the impact of the advances achieved by the scientists and innovators in the heyday of MIRINZ.

## **MIA Innovation Limited**

MIA Innovation Limited is the research arm of MIA. The wholly-owned subsidiary was established in 2015 to oversee the MIA's research investment, specifically the MIRIF (Meat Industry Research and Innovation Fund), a research partnership with MBIE, completed in 2023.

Currently, MIA Innovation is focused on a new tranche of innovation investment, which is due to get underway in the 3rd quarter of 2025. This portfolio of innovation projects has been designed to underpin achievement of goals in the 2020 Red Meat Sector Strategy and builds on and incorporates past learnings from the MIA R&D investment.





## Nutritional Science - Pasture Raised Advantage

The Pasture Raised Advantage (PRA) is a \$2 million research programme exploring the health and nutritional benefits of New Zealand pasture-raised beef and lamb compared to grain-finished beef and plant-based alternatives, when eaten as part of a balanced diet. The aim of the research was to provide robust scientific data about the benefits of including pasture-raised meat in the diet and provide a counterpoint to data in the scientific literature focused on grain-raised production systems. The research team included experts from the University of Auckland, AgResearch, Massey University, Riddet Institute and the University of Otago.

The research was made up of four stages, including both laboratory-based studies and human clinical trials. Results published to date show significant differences in the digestion of protein from meat compared to plant-based alternatives, but only subtle differences in response to lipids and fatty acids. All of the results show that pasture-raised or grassfed red meat is highly nutritious and can be included as part of a balanced healthy diet that will be good for you.

Further information is available on the MIA and BLNZ Inc websites.

### Nutrition

In the 1980s red meat was just coming under scrutiny for its saturated fat and cholesterol content, as scientists were making the link between the food we eat and health outcomes. Meat was still considered a staple in the diet, but concern was rising about its impact on health and its potential contribution to heart disease.

While the nutrient density of red meat was acknowledged, the fat content story overshadowed these benefits in public health discussions and red meat was grouped with other “high fat” foods which needed to be limited in the diet. US dietary guidelines began recommending lean meats and reducing saturated fat intake, with these guidelines shaping public health messaging globally. No differentiation was yet recognised in terms of processed versus unprocessed meat in terms of health risk.

While fat was still considered desirable for taste and tenderness, there was growing interest in lean meat production, to breed animals with a lower fat content.

There was very little knowledge of the importance of bioactives in red meat, including omega-3 fatty acids or full amino acid profiles. Nutritional analysis was mostly done for labelling or quality control and not to assess health risk. Long term health studies were just being considered and cooking methods, and their impact on health were not widely understood or studied.

This stands in contrast to today where we rely heavily on advanced nutritional analysis and robust human clinical studies to provide a realistic picture of meat as an essential part of a healthy diet.

## Food Safety Science Research

The New Zealand Food Safety Science and Research Centre (NZFSSRC, the Centre) is a virtual Centre of Excellence for Food Safety research in New Zealand, funded via Massey University, MPI and industry. MIA has been a member of the Centre since 2015 and via its gold membership status both MIA and its members have access to co-funding for research projects, and a seat on the NZFSSRC Industry Leadership Group. The Centre acts as a focal point for research coordination and is held in high regard for its scientific credibility and integrity, providing a platform for effective communication, networking and relationship building across the food sector and into government.

A focus of the 2025-27 work programme between the MIA and Centre is research into the management of Shiga Toxin producing Escherichia Coli (STEC). STECs are a group of bacteria that can contaminate food and cause illness, particularly in young and vulnerable patients. Internationally understanding around which STECs are causing human illness is changing as detection methods improve. Our work is looking at better understanding the genetic types of STECs found in New Zealand using advanced scientific techniques and preparing industry for any changes in management that might be required by global markets.

A core function of the Centre is managing the Emerging Risk Identification System (ERIS), which provides intelligence to the New Zealand food industry on emerging

food safety risks. The system has been running since 2021 and is providing regular feedback regarding emerging or recurring food safety related risks. ERIS is complementary to and operates alongside horizon scanning systems run by New Zealand Food Safety (NZFS) and Food Standards Australia and New Zealand (FSANZ).

The ERIS triages and identifies food safety risks of relevance for food producers in New Zealand and generates briefing notes that are then assessed by industry experts. Any issues of significance are followed up with research or other actions as appropriate. Of interest in 2024-25 is the growing number of reports about chemical residues in food, much of which is related to the increasing ability of investigators to identify potential contaminants via improved testing methods. ERIS is maintaining a close watch on this topic and its potential impact for New Zealand producers.

In identifying these potential risks, the system has provided a focal point for industry to discuss emerging issues from a pan-sector perspective, increasing the depth of discussion about issues and widening the scientific knowledge base amongst the participants.

Updates from the ERIS are available to members on the MIA website.

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## Strategic Initiative Fund

In October 2023, MIA formally established the Strategic Initiative Fund, collected via a levy on processors, to fund innovation and strategic industry projects. Formally called the Industry Initiative Fund and collected by the MPI, changes to the way the fund is collected and administered allow for greater scope and flexibility in the use of funds for industry.

The Strategic Initiative Fund is administered by MIA and invests in a range of strategic projects that benefit the whole sector, from market access and trade, sustainability and the environment, to innovation initiatives.

## Research and Development Workshop

In late March, the MIA and AgResearch held the annual Red Meat Innovation Workshop in Palmerston North. This event, a highlight on the MIA calendar, focuses on enhancing our understanding of red meat and leveraging innovation and technology to boost productivity and profitability in the sector.

The workshop attracted a record crowd of over 100 delegates in 2025. Speakers included Edwina Toohey, CEO of AMPC, who spoke about the breadth of work AMPC is undertaking in innovation - ranging from advanced manufacturing to environmental projects and student development programmes to encourage more young people to take up a career in the sector. There were also discussions about R&D and market strategies for leather, an update on meat inspection, marketing and trading of venison, advances in plastics for packaging, breeding and the use of Artificial Intelligence for meat quality.

The next workshop is scheduled for March 2026 in Palmerston North.

**This year, MIA held its inaugural Dragons Den at the workshop, designed to spark fresh and innovative ideas for the sector. The contest attracted 42 entries, five of which were invited to present their concept to a panel of industry experts at the workshop in the Dragon's Den setting.**

Renyu Zhang, a senior scientist with AgResearch, was named winner of the contest, with an innovative idea for transforming mechanically deboned meat (MDM) into a meat flake for seasoning. The prize was \$10,000 to develop a business case, to progress the idea into a research project. Zhang's proposed a novel unamification process to transform lower-value MDM into a meat flake with high unami — savoury flavour — which would be stable at room temperature and have uses as a protein enhancer and snack food. Renyu's idea stood out both for the innovative process proposed and the opportunities for global interest in such a product.



*Renyu Zhang, the inaugural Dragons Den winner*

# WORKFORCE





### Industrial relations and the workforce in 1985

While industrial relations are relatively stable in 2025, the mid-1980s was a period of change and upheaval, which had a significant impact on the meat industry.

The MIA annual report for 1985/86 noted that:

*“The first wage talks for awards under the country’s new system of flexibility in wage bargaining commenced on 16 September 1985. The Meatworkers’ award was one of the three lead awards starting on the first day. Seven months later the award was finalised. At that time the industry was standing alone on two counts – it had taken seriously the Government’s call to fix wages dependent on an industry’s ability to pay and had suffered a six week national strike, which lasted a further two weeks in the Auckland area to achieve that.”*

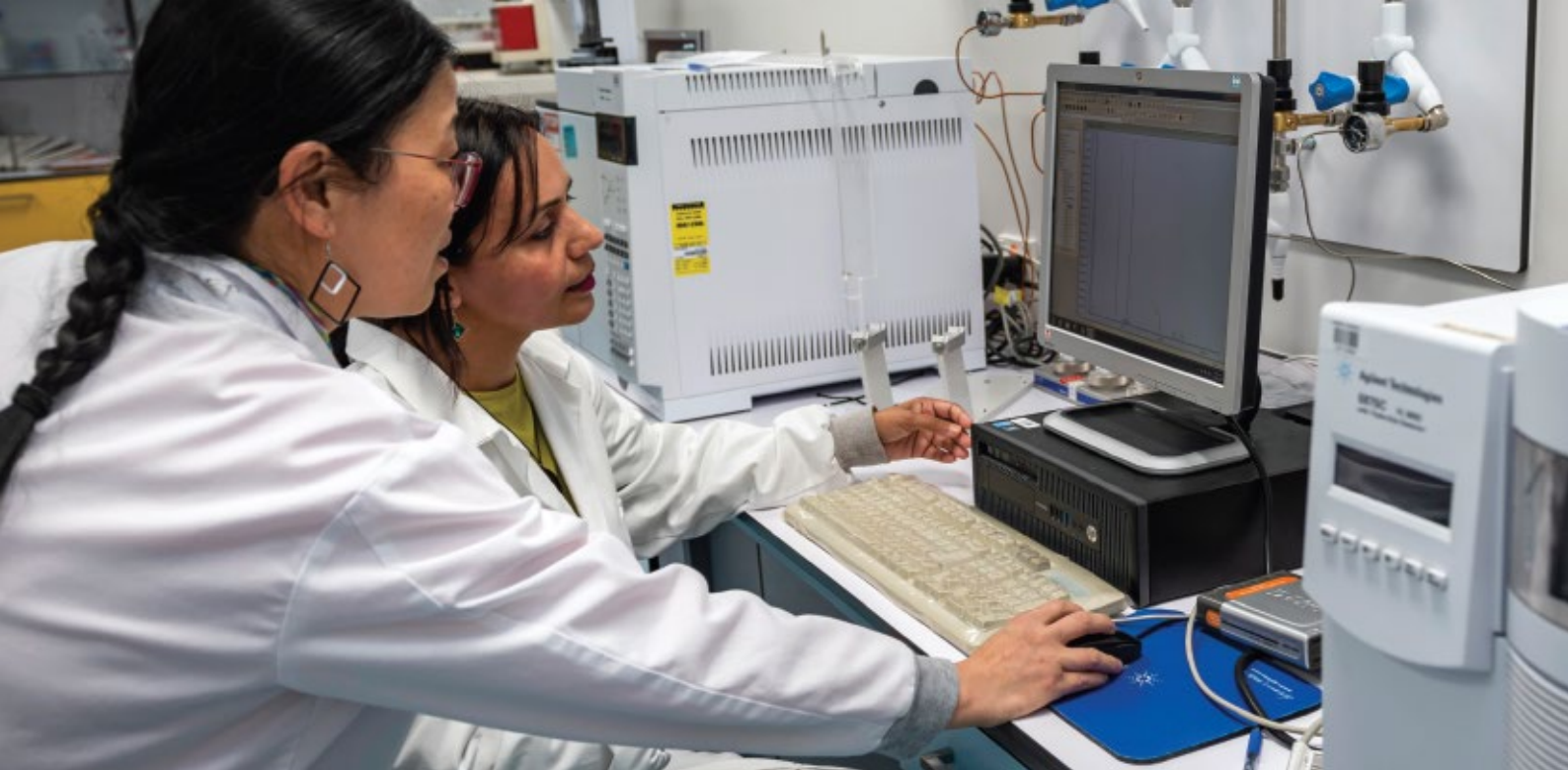
The 1985/86 annual report shows that work stoppages in the 1985 calendar year resulted in 320,761 lost work hours and an estimated \$28 million in lost wages.

The following year’s annual report shows that work stoppages in the 1986 calendar year resulted in 8.5 million lost work hours and an estimated \$100 million in lost wages. This included the six-week national stoppage between late February and early April 1986.

Another change over compared to 40 years ago is the age of the workforce. The first MIA annual report noted that the meat industry workforce was relatively youthful, with 22 percent under 25 years old and 65 percent under 40 years old, and only a small proportion, four percent, over 60 years old.

In contrast the age of the current meat industry workforce is somewhat older. 19 percent are under 25 year old and 50 percent are under 40 years old, but 12 percent of the meat industry workforce are over 60 years old.

The red meat industry is a cornerstone of New Zealand’s economic and social wellbeing, earning \$10.87 billion in export value in 2024/25 and supports around 25,000 jobs, mostly in regional New Zealand.



## Training

During 2024/25, MIA actively engaged in seeking to shape the future of vocational education and training to ensure it remains relevant and capable of supporting productivity growth in the meat processing industry.

With the Government's decision to replace Te Pūkenga and Workforce Development Councils with Industry Skills Boards (ISBs), the year was marked by an intense series of consultations, member engagement and submissions to regulatory agencies.

### **Taking stock of the industry's needs**

MIA began the year by seeking to further characterise the industry's current uptake and needs for vocational education and training, to inform policy and advocacy activities when engaging in reform of the education system.

Across the industry, there is considerable variability in the extent to which companies enrol staff in NZQA-recognised training courses. While some companies maintain strong participation, industry data indicates that overall enrolments in these formal programmes have been declining in recent years. In contrast, the use of private training providers has been increasing, suggesting a shift toward more flexible or tailored training solutions that better align with plant operations.

Most processor member companies continue to have at least some staff enrolled in apprenticeships, which remain a valuable pathway for developing skills in the industry. However, members have expressed some frustration with the administrative aspects of training, particularly the processes and paperwork required to manage and report on learner progress.

Government contributions towards formal training were widely acknowledged as vital, particularly in enabling companies to deliver a more rewarding and structured induction for new staff. Programmes such as the Apprenticeship Boost and various Ministry of Social Development schemes continue to play an important role in both recruitment and training, supporting companies to attract new workers and build capability within their teams.

Moving forwards, MIA members emphasised the importance of the vocational education system continuing to cater for learning and assessment within the workplace and on training that is efficient to administer and industry relevant. Competition among training providers is regarded as necessary to maintain efficiency and responsiveness in the system.

### **Influencing Vocational Education Reform**

In early- to mid-2025, the Government's reform of vocational education (RoVE) included a series of consultations seeking feedback about the settings for the system in future. Across these, MIA was supportive in principle of ISBs as a means to improve the system's responsiveness to industry needs but pressed for safeguards to ensure they remain firmly led by and accountable to the sectors they serve.

Key themes in submissions included a focus on ensuring ISBs remain strongly aligned with their core functions and a stronger focus on their potential to play a role in improving industries' productivity.

MIA has also emphasised the importance of public funding for standard setting, with a preference for sustainable funding arrangements and no shift of costs to employers, avoiding the risk of compromising sector growth and profitability.



## Immigration

Whilst the meat industry aims to employ New Zealanders first and foremost, the reality is that during the peak months of the season, the demand for these roles exceeds the available workforce in New Zealand. Therefore, a small number of migrants are a vital part of the meat industry.

The meat industry has benefitted from more permissive immigration settings under the Accredited Employer Work Visa (AEWV) this year. Changes included a market rate for the role being paid, instead of specific wage thresholds, and the visa term being increased from two years to three years. The requirement to complete Employment New Zealand's online modules was removed, only two years of experience was required instead of three years, and employers only need to declare that lower-skilled roles have been advertised with Work and Income. However, many migrants have been unable to pass the English language test that became a requirement of the AEWV from April 2024. Like other industries, later this year many AEWV holders will need to leave New Zealand because they have reached the end of their visa term and will need to be replaced by new AEWV holders.

In August 2024, the Specific Purpose Work Visa (SPWV) for a nine-month visa term was introduced. The SPWV has been popular because it only requires four months

of experience and has no English language requirement. The SPWV will be available until the two new Seasonal Visas are introduced in December 2025.

The meat industry was fortunate again to receive an allocation of 320 places for a seven-month visa term under a Sector Agreement in July 2024. Whilst no experience is required under a Sector Agreement, the English language test still applies, so many employers and migrants have preferred to use the SPWV instead.

To recognise their importance to the industry, Halal slaughterers are now categorised as ANZSCO Skill Level 3 (instead of Level 4). This means that slaughterers can obtain a five-year visa and may have a pathway to residency. Halal slaughterers are already on the Green List with a pathway to residency.

MIA has responded to two extensive consultation processes and has developed positive working relationships with immigration officials to ensure that settings are suitable for members.

# MIA Scholarship Programme

The MIA Scholarship programme is a highlight for MIA, with a growing community of tertiary level students having received support from this initiative as they begin their careers in agriculture and the red meat sector.

The programme was established in 2017 by MIA with a grant from the Food Industry Training Trust but has been funded directly by processors since 2022. This year's cohort of 15 students includes one doctoral student (jointly funded by MIA and the NZFSSRC) and 14 undergraduates studying law, commerce, agribusiness, mechanical engineering, agriscience, and environmental science.

Alongside a financial stipend, the scholars receive a package of benefits that includes a tailored mentoring programme. This is highly valued by the scholars and thought to be one of the reasons for the programme's continued success. Mentoring assists scholars into processing industry employment, provides one-on-one support for individuals and gathers the group together for industry events and workshops twice in the academic year. Via mentoring, students engage with executives and influencers in the processing industry and, often through these encounters, are finding inspiration and new career opportunities that encourage them to stay in the sector.

Since its inception in 2017, 64 students have passed through the MIA scholarship programme, 15 of whom were postgraduates.

Lincoln and Massey University graduates make up the majority of students, with 58 percent enrolled in business and 42 percent in technical/science aligned degrees.

Of the 49 scholars graduated from the programme, the first job for 76 percent of them was in the agricultural sector, with 49 percent working directly for meat processors. In 2025, 63 percent are still working for the agricultural sector and 16 percent for meat processors.



## ***MIA scholars at the conference***

In 2024 MIA held two events for the students. The first in Wellington was hosted at the MIA offices, where the focus of the day was the work of the MIA and relevant government agencies such as MPI. The scholars also toured Parliament and spoke with government officials.

The second event was held in Christchurch, aligned with the 2025 Red Meat Sector Conference. In a half-day session scholars were introduced to the careers of meat industry executives and then participated in media training, which included scenarios requiring them to front foot answers to complex questions around health and safety, greenhouse gas mitigation, and animal welfare concerns. The scholars also attended the conference itself and participated in a panel discussion providing a Gen-Zer's perspective on the future of the sector. This is an outstanding group of young leaders who have a passion for the sector and its future, and this was very clear from their time at the RMSC.

We continue to gather testimonials from both past and present students, which are available on the MIA website, and highlight the value of the scheme for supporting the introduction of talent into the processing industry.





### Health and safety in 1995



It is difficult to provide an exact comparison between health and safety statistics in 1985 and today, due to changes in the way injury data has been recorded. However, one area where there has been a significant improvement is in the protective equipment that workers wear, as highlighted in these contrasting photos from 1985 and today.

Health and Safety continues to be a critical whole-of-industry issue that must be dealt with in a well-coordinated and committed way.

There is a clear commitment that we need to work together with our partners and workers to lead a significant change to improve the wellbeing and safety of everyone working in the red meat processing industry so our people will thrive. To take this commitment forward, work is near completion on a “strategy on a page” setting out what we want to see improved. MIA is currently advertising for a Health and Safety coordinator to support the work that the MIA Council has agreed on the strategy.

At an operational level, MIA facilitates a Health and Safety Forum, which includes company health and safety managers and representatives from MPI, AsureQuality and the New Zealand Meat Workers Union.

The Forum meets twice per year with a key goal of lifting health and safety outcomes across the processing industry by sharing knowledge and experience across MIA members reflecting the non-competitive nature of

health and safety, as well as engaging with third parties to understand how other industries are engaging on health and safety.

The major projects for the year completed include:

- The development of a benchmarking tool allowing participant companies to benchmark their performance against the wider processing industry. It will also provide critical data to direct resources to where we can get the greatest improvement in health and safety outcomes for our workforce.
- Updating the MIA Industry Health and Safety Guidelines to better reflect the technology and regulatory environment along with changing demographics in our workforce to ensure that we can get more substantial engagement.
- Member companies working with MPI on developing Person Conducting a Business or Undertaking (PCBU) agreements.



# Biosecurity

## Biosecurity in 1985

In 1985, New Zealand was making great progress towards the national eradication of bovine brucellosis, whilst concurrently seeing escalating cases of bovine tuberculosis, both important zoonotic diseases of cattle.

Overseas at this time, nobody realised that a disease that would soon rock livestock production and the international trade in beef was silently spreading through cattle farms located primarily in southern England. This would come to be known as bovine spongiform encephalopathy (BSE), first observed in April 1985 in Sussex, England.

New Zealand has never had a recorded case of BSE, a status that reflects both an element of good fortune and the ongoing commitment of government and industry to maintaining strict biosecurity and feed controls.

While many countries have had to respond to the serious consequences of BSE outbreaks, New Zealand's disease-free status has been preserved through careful regulation, surveillance, and a precautionary approach to managing potential risks. This outcome is not taken for granted; it underscores the importance of continued vigilance and collaboration to protect animal health, trade, and public confidence.

The continued high performance of the biosecurity system is essential for the viability of New Zealand's red meat sector because:

- export of livestock products to premium markets requires the maintenance of freedom from a wide range of exotic pests and diseases
- low occurrence of endemic diseases among New Zealand's extensive pastoral farms supports their financial sustainability
- the high health status of pastoral farming in New Zealand enables world leading standards of animal welfare and minimal use of antimicrobials and other veterinary medicines. These attributes of the provenance of New Zealand red meat products are increasingly demanded by customers and support the sector's competitiveness in the international marketplace.

## Review of the Biosecurity Act

In late-2024, MPI consulted on wide-ranging proposals to amend and modernise the Biosecurity Act 1993.

MIA's submission focused on ensuring the Act remains science-based, equitable, and practical for the livestock sector. The proposals included measures that would enable more sector-specific governance and delivery of biosecurity readiness and response activities, which was welcomed by MIA. Measures to introduce stronger penalties for high-risk goods breaches, the streamlining of biosecurity emergency declarations and provisions to make the process of preparing and assessing claims for compensation more efficient were all supported.

MIA also recommended increased risk management for Foot and Mouth Disease (FMD) by strengthening controls on feeding food waste to pigs, and by requiring all owners of FMD susceptible animals to register the location of their premises in a biosecurity database.

## Mandatory eASDs to improve animal traceability

Traceability of livestock is essential for effective preparedness and response to outbreaks of exotic diseases. It also underpins the management of issues associated with residues and supports assurance related to product provenance.

In the case of a notifiable disease incursion, such as FMD, a reliable, robust and recognised traceability framework is required to prove that red meat products from New Zealand, or parts thereof, are disease-free to resume trade.

As it currently stands, traceability for sheep (and goats and pigs) is enabled by consignment level Animal Status Declarations (ASDs), supplied as either paper forms that

accompany animal movements or as electronic records (eASDs) entered into an electronic system maintained by OSPRI. Use of the latter is, however, currently optional and cannot be used for movements of stock involving saleyards.

There are significant potential benefits to all owners of livestock making these declarations electronically and holding this information in a central database where it can be accessed in the event of an emergency. To enable this, MIA has been working with B+LNZ, MPI, OSPRI and other partners seeking to make the changes and investment necessary to phase out use of paper records for movements of groups of livestock.

## Foot and mouth disease operational agreement / readiness work

During 2024/25, MIA along with MPI and five other partners, Pork NZ, Deer Industry New Zealand (DINZ), DairyNZ, B+LNZ and the Dairy Companies Association of New Zealand (DCANZ), signed an FMD Operational Agreement (OA), which came into effect on 1 July 2025.

This agreement will be governed by an FMD Council and agrees how industry and the Crown (MPI) will both prepare for FMD and, in the event of an FMD incursion, will manage its eradication.

- Included in the OA is agreement on funding splits:
- Readiness: 60 percent MPI, 40 percent Industry
  - Response: 85 percent MPI, 15 percent Industry

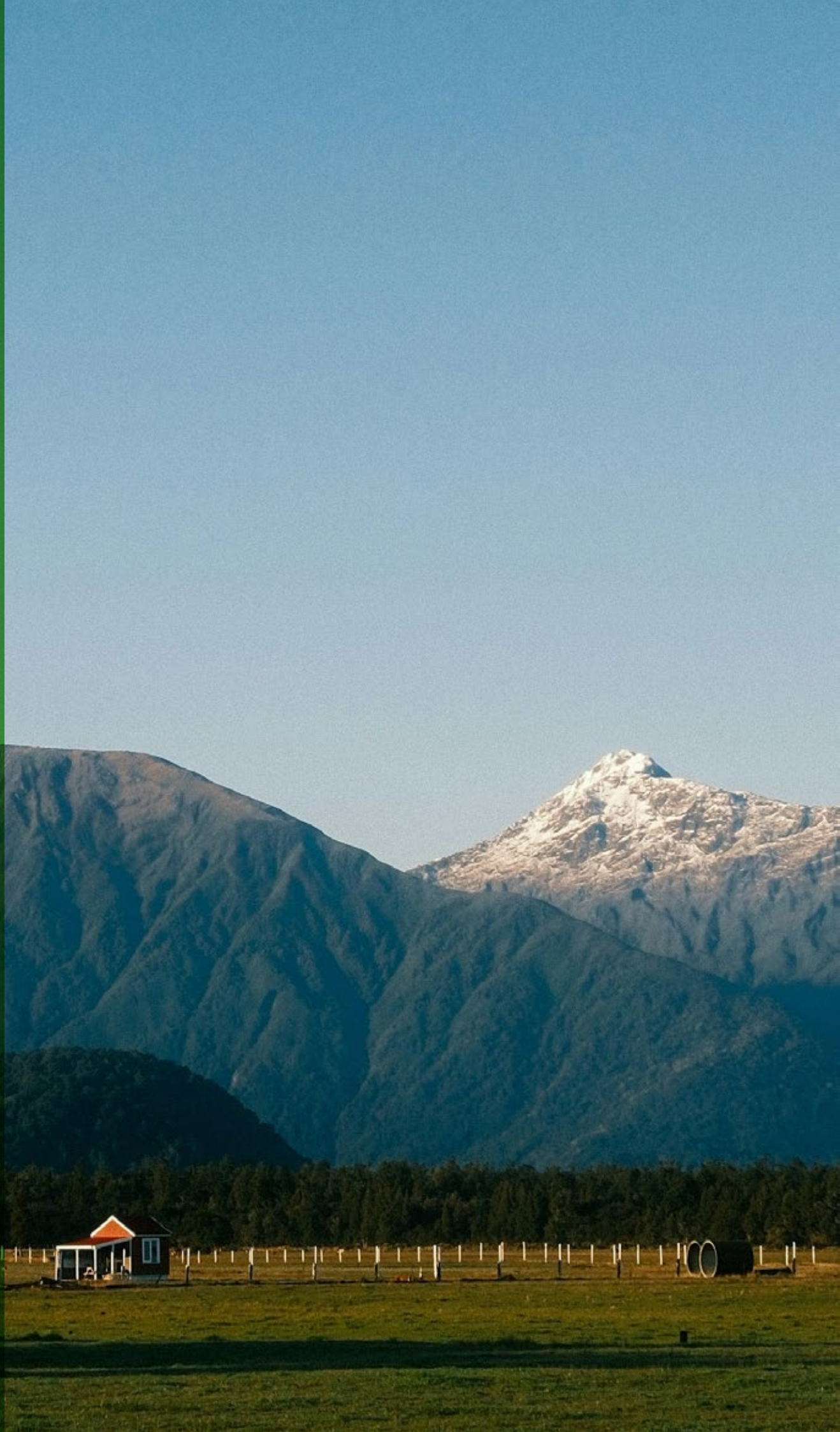
Industry has also agreed a fiscal cap of \$450 million in the event of a response, which is the maximum liability under the agreement for a response event. Based on current industry valuations the MIA liability would be approximately \$70.5 million.

Repayment is not expected to begin until one year after FMD freedom is recognised by the World Organisation for Animal Health with a 10-year repayment period.



The agreement has taken a number of years to negotiate and is a testament to both MPI and industry willingness to work collaboratively together to manage the risk to the sector and the wider New Zealand economy.

# ENVIRONMENT



## Climate change

MIA, jointly with B+LNZ, provided a submission on the Government's approach to New Zealand's second emissions budget (ERP2), which covers emissions reduction between 2026-2030. In its submission, MIA highlighted that access to markets, shelves, and consumer pockets are affected by responses to climate change. The climate impact of red meat production is framed as a key risk for investors, insurers and banks. On-farm, emissions reductions are occurring due to land-use change. The ERP2 was finalised in December 2024 and takes a technology-led approach to agriculture emissions, as well as changes to ETS settings to curtail whole farm conversions to forestry.

Other developments in the year saw the continuation of the Pastoral Sector Group (PSG), which the Government established as a forum to discuss agriculture emissions. MIA is a member of the PSG along with Federated Farmers, B+LNZ, DCANZ, DairyNZ, and DINZ.

MIA continues to advocate for pragmatic and practical climate change policy. Clear pathways must be developed to ensure any targets set are achievable. This includes increased investment in research and development of low-emissions technologies and creating an enabling regulatory environment to enable the application of tools to mitigate and adapt to a low emissions future. Any targets and policies must consider the impact on trade and market access, ensuring New Zealand's agricultural products remain competitive internationally.

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## Sector decarbonisation

To support industry efforts on decarbonisation, MIA and the Energy Efficiency and Conservation Authority (EECA) have entered into an agreement designed to benchmark energy use and efficiency in the red meat processing sector. Following a similar exercise undertaken in 2010, the purpose of this survey is to understand aggregate energy consumption and efficiency in the industry and how it has changed over time. The survey results will allow members

to benchmark their energy use and enable meaningful comparisons to be made about progress over time in decarbonising the sector and becoming more energy efficient.

Aggregate data for the industry will be presented in a report (to be prepared by B+LNZ under contract to MIA) which will be made public by the MIA and EECA.

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## Reform of the regulation of use of gene technology

In late-2024, the Government consulted on proposals for significant reform of how use of gene technology in New Zealand is regulated. This included adopting a much more permissive regulatory environment overseen by a bespoke Gene Technology Regulator, which was strongly influenced by the approach taken to gene technology in Australia.

MIA recognises that gene technology offers potential solutions to some of the most significant biological challenges facing New Zealand's red meat sector. However, gene technology also poses risks to trade and market access for primary sector exports that underpin the New Zealand economy.

Specifically, MIA is concerned that meat from gene edited animals requires specific regulatory approval before it is eligible to be sold in any of our major markets.

Accordingly, MIA supported the progress of the Bill but has proposed that amendments are required to allow for the prevention and management of the potential risks to trade. These included advocating that risks to regulated market access must be among the risks that are required to be considered by the regulator before making any decision about the release of gene edited or modified animals.

At the time of writing, the Select Committee is still considering feedback and preparing its report.



# Animal Welfare

New Zealand takes animal welfare seriously and the New Zealand system for ensuring high animal welfare standards is well regarded internationally. MIA works closely with other primary sector organisations to ensure that we maintain this reputation.

MIA continues to play an active role in the Farm to Processor Animal Welfare Forum ensuring that issues of national importance are identified, prioritised and managed appropriately.

Our members continue to manage animal welfare, having trained animal welfare officers at plants allowing them to meet both their commercial commitments along with the regulatory requirements whilst maintaining the highest animal welfare standards.

## **Bobby calves**

The processing industry has a goal of ensuring that the welfare of bobby calves is safeguarded during transportation and lairage prior to processing. In the 2024 season, 1.851 million bobby calves were processed, with a calf mortality rate of just 0.05 percent.

Calf numbers were down compared to 2023. This is due to the increased confidence in the beef sector, so more calves were retained for rearing as well as a slight reduction in dairy cow numbers.

The mortality rate of 0.05 percent is the same as 2023 and was vastly improved over 2008, when the rate was 0.68 percent. This demonstrates that MIA members are able to consistently manage the challenges associated with processing bobby calves.

By managing the challenges processing bobby calves, there were no material delays in getting calves processed, and farmers were able to move calves off farm in a timely manner improving animal welfare outcomes.

Aiding this was a number of processors continue to expand the use of electronic booking systems to ensure ease of booking, improved logistics and improved experience for suppliers.

As MPI Verification Services had identified calves getting wet during transport as an issue, considerable planning with transport operators went into managing this issue and it was pleasing to note that there were no material issues with wet calves.

Expectations for the 2025 season are a continued reduction, albeit slight, in calf numbers due to the reduced dairy herd and increased numbers retained for rearing.

# Ovis Management Limited

## Nearly 40 years of Ovis Management Limited

After initial success with control measures in the 1970s, the prevalence of *Cysticercus ovis* (sheep measles) in New Zealand began rising again around 1985. Between 1985 and 1988, the prevalence of sheep measles showed a concerning upward trend. Dogs were undergoing blood testing during this period, and infection rates showed that 0.01 percent of dogs had *Taenia ovis* tapeworms. There is no longer a blood test available for this because it was deemed to have limited diagnostic value. The test measured antibodies and did not reliably indicate an active infection. It was also expensive and logistically complex to blood test working dogs regularly.

While exact prevalence levels are not available, surveys from the late-1980s indicated a resurgence in visible sheep measles cysts found in lamb and ewe carcasses at processing plants. Processing plants had to divert resources to identify and trim infected areas, slowing down processing lines and increasing costs. During this time, authorities started separating *Cysticercus ovis* control from *Echinococcus granulosus* (Hydatids). This reduced the frequency of dosing dogs and is likely to have contributed to the rise in sheep measles prevalence, as more dogs could act as carriers.

Overseas buyers, especially in the US, began rejecting shipments with visible lesions, which raised concerns about New Zealand's meat hygiene standards. The presence of sheep measles cysts was cited as justification for trade restrictions. Even with only three farms confirmed to have infected sheep in 1990, the economic impact was significant – a one percent drop in export value was estimated to cost the industry \$12 million.

Ovis Management Limited (OML) was formed in 1988 as a non-profit subsidiary of MIA as a strategic response to the growing economic and reputational risks posed by sheep measles in New Zealand's red meat industry. This reflected a coordinated effort by processors to address a shared biosecurity challenge.

OML has been highly effective in reducing the prevalence of sheep measles across New Zealand. In the early years, sheep measles prevalence was around 1.92 percent in lambs and 4.8 percent in sheep, with actual infection likely to be higher due to detection limitations. Currently, the lamb prevalence levels are 0.54 percent and 1.58 percent in sheep. According to surveys, 68 percent of farmers now prioritise controlling sheep measles, compared to 25 percent in 2010. This low-cost programme monitors 98 percent of sheep processed nationwide.

Ovis Management Ltd (OML), a non-profit, wholly owned subsidiary of the MIA, provides a low-cost programme to help sheep farmers and dog owners in rural areas control *Cysticercus ovis*, also known as sheep measles.

The current OML board consists of Chair Andrew Morrison and George Tatham (both farmer representatives) and Sirma Karapeeva and Greg McSkimming, who represent the industry. In August 2024, Sophie Henderson joined the OML board as an Associate Director. Michelle Simpson is the Project Manager.

OML is pleased to have the support of New Zealand Farm Assurance Incorporated (NZFAI) and the New Zealand Farm Assurance Programmes. This is a positive

opportunity to collaborate and ensure that dog dosing is being reinforced on farm with combined messaging, therefore preventing an increase in sheep measles.

OML's unique farmer database allows us to work with farmers where sheep measles is having a direct impact. We achieve this by our close partnership with the meat companies and AsureQuality.

### Programme in Action: A Case Study

During February 2024, OML was alerted by one of our partner plants to a sudden increase in incidence of sheep measles on the property of a supplier. A line of 310 lambs had 177 incidences reported: a 57 percent incidence rate. This one farm's sheep measles outbreak increased the region's prevalence by 0.5 percent for the 2024/25 season.

After further investigation and working closely with the farm owner, a management plan was implemented to minimise the risk of further infection. The results have been extremely pleasing.

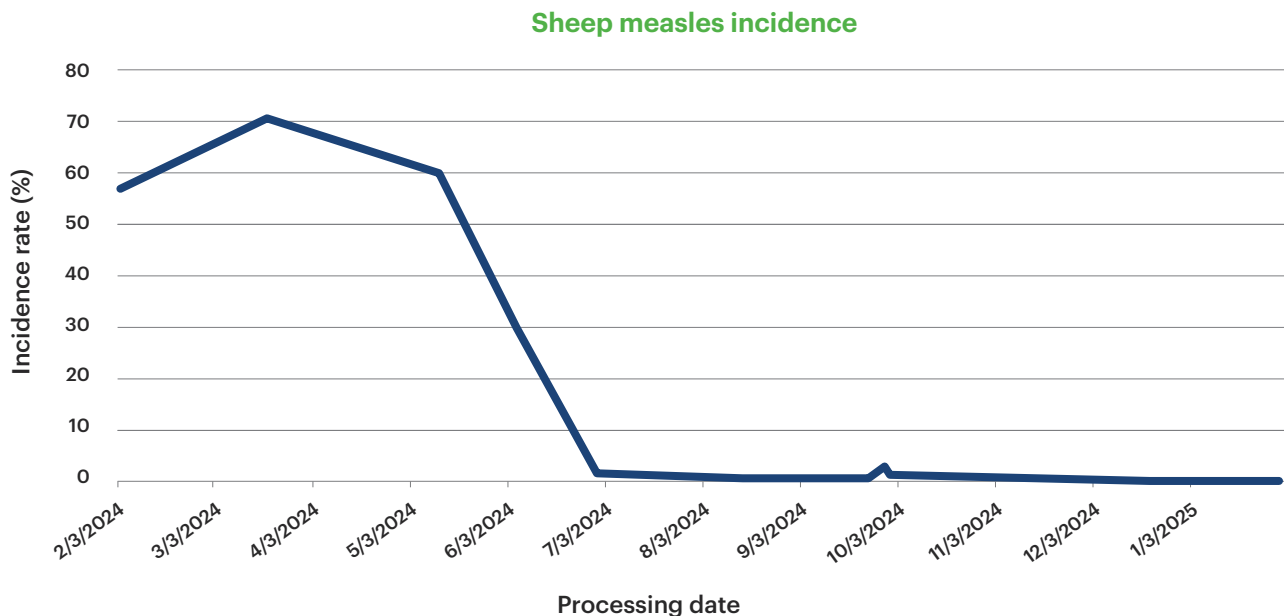
While it is encouraging that the prevalence in New Zealand of sheep measles in lamb and mutton is being maintained around 0.54 percent and 1.58 percent respectively, OML has faced several challenges over the past 12 months, including rising costs. Operating with lean resources means balancing impact with affordability. OML is constantly reassessing its strategy to stay effective without overspending.

The ongoing concerns remain:

- Farmers who have had minimal infections in recent years scaling back dog treatments due to affordability.
- Low national infection rates causing farmers to become relaxed or complacent.
- The increasing climate changes whereby parasites are surviving for longer.
- Farmers who finish store lambs pass the issue on with no awareness.
- Infected roaming urban and rural dogs.

These factors reiterate the importance of being able to generate a nationwide conversation to reach the appropriate target audiences and ensure that sheep measles does not affect the industry.

Date of slaughter	Number in line	Number infected	Incidence %
03/02/2024	310	177	57.1
20/03/2024	410	290	70.7
13/05/2024	325	195	60.0
04/06/2024	343	109	31.8
01/07/2024	428	6	1.4
15/08/2024	197	1	0.5
24/09/2024	398	2	0.5
29/09/2024	35	1	2.9
30/09/2024	161	2	1.2
01/10/2024	183	2	1.1
23/12/2024	223	0	0.0
24/12/2024	143	0	0.0
29/01/2025	129	0	0.0







**Special Purpose Financial Statements  
for the year ended 30 June 2025**

# **FINANCIAL REPORTS**

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## Directory

for the year ended 30 June 2025

<b>Principal Business:</b>	Trade Association representing New Zealand Meat Processors, Exporters and Marketers
<b>Registered Office:</b>	Wellington Chambers Level 5 154 Featherston Street Wellington
<b>Incorporation Number:</b>	217685
<b>IRD Number:</b>	26-974-542
<b>Auditors:</b>	KPMG 44 Bowen Street Wellington
<b>Solicitors:</b>	Burrowes & Company 24 Johnston Street Wellington
<b>Bankers:</b>	Bank of New Zealand 222 Lambton Quay Wellington
<b>Business Location:</b>	Wellington

# Independent Auditor's Report

To the members of Meat Industry Association of New Zealand (Inc)

**Report on the audit of the Incorporated Society and Group special purpose financial statements**

## Opinion

We have audited the accompanying Incorporated Society and Group special purpose financial statements which comprise:

- the Incorporated Society and Group balance sheet as at 30 June 2025;
- the Incorporated Society and Group statement of changes in equity and statement of comprehensive income for the year then ended; and
- notes, including a summary of significant accounting policies and other explanatory information.

In our opinion, the accompanying Incorporated Society and Group special purpose financial statements of Meat Industry Association of New Zealand (Inc) (the Incorporated Society) and its subsidiaries (the Group) on pages 52 to 60 present fairly in all material respects:

- the Incorporated Society and Group's financial position as at 30 June 2025 and its financial performance for the year ended on that date;
- In accordance with the accounting policies outlined in the special purpose financial statements.

## Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (New Zealand) (**ISAs (NZ)**). We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

We are independent of Meat Industry Association of New Zealand (Inc) in accordance with Professional and Ethical Standard 1 International Code of Ethics for Assurance Practitioners (Including International Independence Standards) (New Zealand) issued by the New Zealand Auditing and Assurance Standards Board and the International Ethics Standards Board for Accountants' International Code of Ethics for Professional Accountants (including International Independence Standards) (**IESBA Code**), and we have fulfilled our other ethical responsibilities in accordance with these requirements and the IESBA Code.

Our responsibilities under ISAs (NZ) are further described in the *Auditor's responsibilities for the audit of the Incorporated Society and Group special purpose financial statements* section of our report.

Our firm has provided tax compliance services to the Incorporated Society and Group. Subject to certain restrictions, partners and employees of our firm may also deal with the Incorporated Society and Group on normal terms within the ordinary course of trading activities of the business of the Incorporated Society and Group. These matters have not impaired our independence as auditor of the Incorporated Society and Group. The firm has no other relationship with, or interest in, the Incorporated Society and Group.



## Emphasis of matter – Basis of Accounting

Without modifying our opinion, we draw attention to Note ii of the Incorporated Society and Group special purpose financial statements, which describes the basis of accounting. The Incorporated Society and Group special purpose financial statements are prepared to meet the requirements of the Incorporated Society's rules. As a result, the Incorporated Society and Group special purpose financial statements may not be suitable for another purpose. Our opinion is not modified in respect of this matter.

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## Other information

The councillors, on behalf of the Incorporated Society and Group, are responsible for the other information. The other information comprises information included in the Annual Report, but does not include the Incorporated Society and Group special purpose financial statements and our auditor's report thereon.

Our opinion on the Incorporated Society and Group special purpose financial statements does not cover any other information and we do not express any form of assurance conclusion thereon.

In connection with our audit of the Incorporated Society and Group special purpose financial statements our responsibility is to read the other information and in doing so, consider whether the other information is materially inconsistent with the Incorporated Society and Group special purpose financial statements or our knowledge obtained in the audit or otherwise appears materially misstated.

If, based on the work we have performed, we conclude there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.



## Use of this independent auditor's report

This independent auditor's report is made solely to the members. Our audit work has been undertaken so that we might state to the members those matters we are required to state to them in the independent auditor's report and for no other purpose. To the fullest extent permitted by law, none of KPMG, any entities directly or indirectly controlled by KPMG, or any of their respective members or employees, accept or assume any responsibility and deny all liability to anyone other than the members for our audit work, this independent auditor's report, or any of the opinions we have formed.



## Responsibilities of councillors for the Incorporated Society and Group special purpose financial statements

The councillors, on behalf of the Incorporated Society and Group, are responsible for:

- the preparation and fair presentation of the Incorporated Society and Group special purpose financial statements in accordance with the accounting policies outlined in the special purpose financial statements;
- implementing the necessary internal control to enable the preparation of a Incorporated Society and Group set of special purpose financial statements that is free from material misstatement, whether due to fraud or error; and



- assessing the ability of the Incorporated Society and Group to continue as a going concern. This includes disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless they either intend to liquidate or to cease operations or have no realistic alternative but to do so.

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## Auditor's responsibilities for the audit of the Incorporated Society and Group special purpose financial statements

Our objective is:

- to obtain reasonable assurance about whether the special purpose financial statements as a whole are free from material misstatement, whether due to fraud or error; and
- to issue an independent auditor's report that includes our opinion.

Reasonable assurance is a high level of assurance but it is not a guarantee that an audit conducted in accordance with ISAs NZ will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error. They are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of the Incorporated Society and Group special purpose financial statements.

A further description of our responsibilities for the audit of the Incorporated Society and Group special purpose financial statements is located at the External Reporting Board (XRB) website at:

<https://www.xrb.govt.nz/standards/assurance-standards/auditors-responsibilities/audit-report-s2/>

This description forms part of our independent auditor's report.

KPMG  
Wellington  
27 August 2025

# Councillors' Report

for the year ended 30 June 2025

## Introduction

The Councillors have pleasure in submitting the Annual Report of the Meat Industry Association of New Zealand (Inc) incorporating the special purpose financial statements and auditors report, for the year ended 30 June 2025.

On behalf of the Council these special purpose financial statements were approved for issue on 27th August 2025.



Willie Wiese  
Councillor  
27 August 2025



Councillor  
27 August 2025

# Statement of Comprehensive Income

for the year ended 30 June 2025

	Note	Group		Association	
		2025 \$	2024 \$	2025 \$	2024 \$
Operating revenue		4,009,079	6,167,529	3,405,472	5,688,496
Operating expenditure	1	(4,746,616)	(3,415,606)	(4,124,628)	(2,950,418)
<b>Operating surplus/(deficit) before other income</b>		<b>(737,537)</b>	<b>2,751,923</b>	<b>(719,156)</b>	<b>2,738,078</b>
Other Income/(expense)		(28,362)	100,597	(36,305)	100,597
<b>Operating surplus/(deficit) before financing income</b>		<b>(765,899)</b>	<b>2,852,520</b>	<b>(755,461)</b>	<b>2,838,675</b>
Financial income		128,253	99,274	121,270	86,522
Financial expenses		-	-	-	-
<b>Net financing income</b>		<b>128,253</b>	<b>99,274</b>	<b>121,270</b>	<b>86,522</b>
<b>Operating surplus/(deficit) before tax</b>		<b>(637,646)</b>	<b>2,951,794</b>	<b>(634,191)</b>	<b>2,925,197</b>
Income tax expense/(benefit)	2	-	-	-	-
<b>Net surplus/(deficit) for the year</b>		<b>(637,646)</b>	<b>2,951,794</b>	<b>(634,191)</b>	<b>2,925,197</b>
Other comprehensive income		-	-	-	-
<b>Total comprehensive income for the year</b>		<b>(637,646)</b>	<b>2,951,794</b>	<b>(634,191)</b>	<b>2,925,197</b>

## Statement of Changes in Equity

for the year ended 30 June 2025

	Group		Association	
	2025 \$	2024 \$	2025 \$	2024 \$
Opening Balance	4,512,120	1,560,326	4,092,017	1,166,820
Total comprehensive income for the year	(637,646)	2,951,794	(634,191)	2,925,197
<b>Closing Balance</b>	<b>3,874,474</b>	<b>4,512,120</b>	<b>3,457,826</b>	<b>4,092,017</b>

## Balance Sheet

as at 30 June 2025

Note	Group		Association		
	2025 \$	2024 \$	2025 \$	2024 \$	
<b>Equity</b>					
Accumulated funds	3,874,474	4,512,120	3,457,826	4,092,017	
<b>Total equity</b>	<b>3,874,474</b>	<b>4,512,120</b>	<b>3,457,826</b>	<b>4,092,017</b>	
<b>Represented by:</b>					
<b>Current assets</b>					
Cash and cash equivalents	3	4,262,698	4,264,025	3,706,955	3,814,328
Trade and other receivables	4	1,138,676	1,889,653	1,109,101	1,845,442
<b>Total current assets</b>		<b>5,401,374</b>	<b>6,153,678</b>	<b>4,816,056</b>	<b>5,659,770</b>
<b>Current liabilities</b>					
Trade and other payables	5	1,092,178	1,115,714	891,277	1,021,116
Employee benefits	6	78,632	102,572	69,686	91,929
Income in advance		505,521	570,025	505,521	583,400
<b>Total current liabilities</b>		<b>1,676,331</b>	<b>1,788,311</b>	<b>1,466,484</b>	<b>1,696,445</b>
<b>Working capital</b>		<b>3,725,043</b>	<b>4,365,367</b>	<b>3,349,572</b>	<b>3,963,325</b>
<b>Non current assets</b>					
Property, plant and equipment	7	141,113	130,441	99,936	112,380
Intangibles (software)	8	8,318	16,312	8,318	16,312
<b>Total non current assets</b>		<b>149,431</b>	<b>146,753</b>	<b>108,254</b>	<b>128,692</b>
<b>Non current liability</b>		-	-	-	-
<b>Total non current liability</b>		-	-	-	-
<b>Net Assets</b>		<b>3,874,474</b>	<b>4,512,120</b>	<b>3,457,826</b>	<b>4,092,017</b>

# Notes to the Special Purpose Financial Statements

## Statement of significant accounting policies

### (i) Basis of reporting

The special purpose financial statements presented are for the reporting entity of the Meat Industry Association of New Zealand (Inc) and the consolidated financial statements of the group consisting of the following organisations; Meat Industry Association of New Zealand (Inc) ("Association"), MIA Holdings Limited, MIA Innovation Limited and Ovis Management Limited (collectively "the Group").

The purpose of the Association is to act as a trade association formed for the benefit of New Zealand meat processors, exporters and marketers.

The special purpose financial statements of the Association and Group are for the year ended 30 June 2025. The financial statements were authorised for issue by the directors on the 26th August 2025.

### (ii) Statement of compliance and basis of preparation

The special purpose financial statements are prepared to meet the requirements of the Association's rules.

The special purpose financial statements have been prepared in accordance with the accounting policies outlined in (iii) below.

The special purpose financial statements are presented in New Zealand Dollars (NZD). The financial statements are prepared on the historical cost basis except for accounts receivable which are at cost less impairment.

The accounting policies set out below have been applied consistently to all periods presented in these special purpose financial statements.

### (iii) Particular accounting policies

#### Principles of consolidation

The consolidated special purpose financial statements include the financial performance and position of Meat Industry Association of New Zealand (Inc) and its subsidiaries MIA Holdings Limited, MIA Innovation Limited and Ovis Management Limited. The subsidiaries are accounted for using the purchase method. All inter-company balances and unrealised profit and losses on transactions between group entities are eliminated.

#### Property, plant and equipment

Property, plant and equipment are stated at cost, less accumulated depreciation and impairment losses. Depreciation of property, plant and equipment is calculated on a straight-line basis over their useful lives. Gains and losses on disposal of assets are taken into account in determining the operating results for the year. The rates are as follows:

Furniture and fittings	8 - 20%
Leasehold improvements	8.4%
Motor Vehicles	21%
Computer systems	10 - 67%
Office equipment	17.5 - 36%

#### Intangible assets

Intangible assets are stated at cost less any accumulated amortisation.

Amortisation is recognised in the Income statement on a straight line basis over the estimated useful life of the intangible asset.

Computer software	36 - 40%
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#### Cash and cash equivalents

Cash and cash equivalents comprise cash balances and call deposits.

#### Trade and other receivables

Accounts receivable are stated at cost less impairment losses.

#### Trade and other payables

Trade and other payables are stated at cost.

#### Goods and Services Tax

The special purpose financial statements are prepared so that all components are stated exclusive of Goods and Services Tax (GST), with the exception of receivables and payables, which include GST.

#### Taxation

The tax expense recognised in the Statement of Comprehensive Income is the estimated income tax payable in the current year, adjusted for any differences between the estimated and actual income tax payable in prior periods.

No account is taken of deferred income tax.



### Revenue

- a Revenue represents amounts received and receivable from members including subscriptions and non-members for services provided during the year. No revenue is recognised if there are significant uncertainties regarding recovery of the consideration due. Subscriptions in advance are subscriptions invoiced in June, and included in Accounts Receivable, which relate to the following financial year and hence not included as revenue for the current financial year.
- Revenue amounts received and receivable from industry partners is recognised in profit and loss on a systematic basis in the same periods as expenses are recognised with the balance recorded as income in advance.
- b Revenue from services is recognised in the accounting period in which the services are rendered by reference to the stage of completion of the service contract.
- c Net financing income comprises of interest received on call deposits is recognised in the Statement of Comprehensive Income.

### Scholarships revenue and expense

MIA applies for grants from the Food Innovations Training Trust (the "Trust") to fund the MIA Scholarship program and teaching agribusiness to students. These grants are recognised as revenue to the extent that the scholarships/teaching grants have been expensed in the period. MIA expects any remaining funds to be paid out in future periods or returned to the Trust and recognises a liability for this amount. The scholarships cover multiple years of study however future payments are contingent on scholars passing their current year of study.

### Expenses

Expenses represents amounts paid and payable to suppliers for services received during the year.

### Employee Benefits

#### Long Service leave

The Association's net obligation in respect of long service leave is the amount of future benefit that employees have earned in return for their service in the current and prior periods.

## 1 Operating expenditure

	Group		Association	
	2025 \$	2024 \$	2025 \$	2024 \$
Amortisation of Intangibles (software)	9,314	5,875	9,314	5,875
Audit remuneration	44,000	40,000	34,907	31,340
Other professional services	17,081	8,200	9,945	3,650
Contracts/consultants/projects	386,443	504,879	189,016	481,537
Depreciation	28,923	27,428	21,758	17,534
Director's fees - Chairman	90,000	80,000	90,000	80,000
Director's fees - Subsidiary's Chairman	21,000	21,000	-	-
Personnel expenses	2,012,592	1,885,288	1,767,721	1,643,656
Rental & leasing costs	131,242	107,847	131,242	107,847
Other operating expenses	2,006,021	735,089	1,870,725	578,979
<b>Total operating expenditure</b>	<b>4,746,616</b>	<b>3,415,606</b>	<b>4,124,628</b>	<b>2,950,418</b>

## 2 Taxation

	Group		Association	
	2025 \$	2024 \$	2025 \$	2024 \$
<b>Reconciliation of effective tax rate</b>				
Operating surplus/(deficit) before tax	(637,646)	2,951,794	(634,191)	2,925,197
Income tax using Company tax rate	(178,541)	826,502	(177,574)	819,055
Non-assessable income/non-deductible expenses at company tax rate	202,863	(790,508)	203,333	(791,716)
Losses off set against subsidiary	-	-	1,544	1,533
Losses brought forward and utilised at Company tax rate	-	-	-	-
Tax @ 28%	24,322	35,994	27,303	28,872
Tax benefit of losses not recognised	(24,322)	(35,994)	(27,303)	(28,872)
<b>Income tax expense/(benefit) per income statement</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

The Group has \$295,481 of tax losses to carry forward (2024: \$392,992). The availability of losses to carry forward is subject to the Association continuing to meet the requirements of the Income Tax Act, and agreement of tax losses by the Inland Revenue Department.

## 3 Cash and cash equivalents

	Group		Association	
	2025 \$	2024 \$	2025 \$	2024 \$
Bank balances	563,811	489,437	563,811	489,437
Call deposits	3,698,887	3,774,588	3,143,144	3,324,891
<b>Balance as at 30 June</b>	<b>4,262,698</b>	<b>4,264,025</b>	<b>3,706,955</b>	<b>3,814,328</b>

## 4 Trade and other receivables

	Group		Association	
	2025 \$	2024 \$	2025 \$	2024 \$
Trade Receivables	674,758	1,441,622	669,610	1,401,161
GST Receivable	-	-	-	-
Other Receivables and Prepayments	441,580	448,031	439,491	444,281
<b>Balance as at 30 June</b>	<b>1,116,338</b>	<b>1,889,653</b>	<b>1,109,101</b>	<b>1,845,442</b>
Impairment loss deducted/(recovered)	-	-	-	-

## 5 Trade and other payables

	Group		Association	
	2025 \$	2024 \$	2025 \$	2024 \$
Trade Payables	937,704	681,582	731,052	591,016
GST Payable	31,731	133,500	40,881	132,803
Halal Certification	72,078	252,358	72,078	252,358
PAYE Payable	50,665	48,274	47,266	44,939
<b>Balance as at 30 June</b>	<b>1,092,178</b>	<b>1,115,714</b>	<b>891,277</b>	<b>1,021,116</b>

In addition to the Scholarship funding liability of \$80,797 at 30 June 2025, MIA has committed \$100,000 for scholarships in future years for current scholars which is contingent on passing the current year of study.

## 6 Employee benefits

	Group		Association	
	2025 \$	2024 \$	2025 \$	2024 \$
Liability for Annual Leave	78,632	102,572	69,686	91,929
Liability for Retirement Leave	-	-	-	-
<b>Balance as at 30 June</b>	<b>78,632</b>	<b>102,572</b>	<b>69,686</b>	<b>91,929</b>

## 7 Property, plant and equipment

	Group		Association	
	2025 \$	2024 \$	2025 \$	2024 \$
<b>Furniture and fittings</b>				
At cost	79,611	76,314	79,611	76,314
Accumulated depreciation	(18,443)	(11,204)	(18,443)	(11,204)
	61,168	65,110	61,168	65,110
Current year depreciation	7,239	5,493	7,239	5,493
<b>Leasehold improvements</b>				
At cost	12,404	12,404	12,404	12,404
Accumulated depreciation	(1,003)	(134)	(1,003)	(134)
	11,401	12,270	11,401	12,270
Current year depreciation	869	134	869	134
<b>Motor vehicles</b>				
At cost	46,686	40,506	-	-
Accumulated depreciation	(6,536)	(24,101)	-	-
	40,150	16,405	-	-
Current year depreciation	6,536	8,506	-	-
<b>Computer hardware</b>				
At cost	43,711	40,199	31,015	27,503
Accumulated depreciation	(36,911)	(30,628)	(24,215)	(18,425)
	6,800	9,571	6,800	9,258
Current year depreciation	8,788	11,071	8,475	9,999
<b>Office equipment</b>				
At cost	96,471	96,471	30,132	30,132
Accumulated depreciation	(74,876)	(69,385)	(9,565)	(4,390)
	21,595	27,086	20,567	25,742
Current year depreciation	5,491	2,224	5,175	1,908
<b>Total property, plant and equipment</b>				
At cost	278,883	265,894	153,162	146,353
Accumulated depreciation	(137,769)	(135,452)	(53,226)	(33,973)
	141,114	130,442	99,936	112,380
Current year depreciation	28,923	27,428	21,758	17,534

There is no impairment loss recognised during the year (2024: nil)

## 8 Intangible Assets - Software

	Group		Association	
	2025 \$	2024 \$	2025 \$	2024 \$
At cost	62,050	60,730	55,055	53,735
Accumulated amortisation	(53,732)	(44,418)	(46,737)	(37,423)
	8,318	16,312	8,318	16,312
Current year amortisation	9,314	5,875	9,314	5,875

## 9 Investments in subsidiaries

Name of entity	Principal activity	% Interest held	
		2025	2024
MIA Holdings Limited	General Partner of Limited Partnerships undertaking applied industry research	100	100
MIA Innovation Limited	Research & development	100	100
Ovis Management Limited	Control of C. Ovis Cyst.	100	100

The companies are incorporated in New Zealand and have balance dates of 30 June.

## 10 Lease reinstatement provision

Under the termination of its sublease, the Association is required to reinstate the premises to the condition prevailing upon the commencement of the sublease.

## 11 Operating leases

Non-cancellable operating lease rentals are payable as follows:

	Group		Association	
	2025 \$	2024 \$	2025 \$	2024 \$
<b>Operating leases</b>				
Not later than one year	130,108	130,108	130,108	130,108
Later than one year and not later than five years	390,324	520,433	390,324	520,433
Later than five years	433,694	433,694	433,694	433,694
<b>Total</b>	<b>954,127</b>	<b>1,084,235</b>	<b>954,127</b>	<b>1,084,235</b>

## 12 Capital commitments

There are no capital commitments as at 30 June 2025 (2024: nil).

## 13 Contingent liabilities

There are no contingent liabilities outstanding as at 30 June 2025 (2024: nil).

## 14 Related party information

### (i) Identity of related parties

The immediate parent entity is Meat Industry Association of New Zealand (Inc). All members of the group are considered to be related parties of Meat Industry Association of New Zealand (Inc). This includes the subsidiaries defined in note 9.

In presenting the special purpose financial statements of the group, the effect of transactions and balances between the subsidiaries and the parent entity have been eliminated.

The Association is a voting member of MIRINZ Food Technology and Research Incorporated ("MIRINZ"), over which the Association is deemed to have significant influence. The interest in MIRINZ is not equity accounted as the Association shall not be called upon for contributions nor is it eligible for any distributions.

### (ii) Related party transactions

Ovis Management Limited pays service fees of \$23,796 (2024: \$22,726) to Meat Industry Association of New Zealand (Inc) for administration services provided. As at year end, the Association has recognised \$7,494 as receivable from Ovis Management Limited (2024: \$586). This relates to service fees and office expenses paid by Meat Industry Association on Ovis Management Limited's behalf. MIA Innovation Limited pays

service fees of \$56,250 (2024: \$56,250) to Meat Industry Association of New Zealand (Inc) for administration services provided. As at year end, the Association has recognised a receivable from MIA Innovation Limited for the amount of \$12,843 (2024: \$18,018). This relates to service fees and travel expenses paid by Meat Industry Association on MIA Innovation Limited's behalf. During the year ended 30 June 2025, the Group received \$4,946,637 (2024: \$4,663,704) from companies related to the nine Council members which was included in operating revenue, the \$255,363 amount includes the Halal certification revenue which is offset off by expenses within the Profit and Loss statement, and has recognised a receivable of \$514,668 (2024: \$410,968) from these companies. In addition, included within the Halal Certification payable, there is \$51,041 (2024: \$219,999) payable by the Group to the companies relating to the nine Council members.

### (iii) Remuneration

Total remuneration is included in personnel expenses (see note 1).

The Chairman is paid an annual fee; (see note 1).

## 15 Subsequent events

There are no events subsequent to balance date that would materially effect these special purpose financial statements (2024: nil).



PEOPLE

# MIA Council



## Nathan Guy

Nathan was appointed as the Association's Independent Chair in June 2022 and formally took over the role at the Red Meat Sector Conference in August 2022. He served in Parliament for 15 years and was Minister for Primary Industries for five years. Nathan is also Independent Chair of Apiculture New Zealand.



## Dan Boulton

Dan Boulton is the Chief Executive of Silver Fern Farms and has been a Council member since February 2024.



## Peter Conley

Peter Conley is the Chief Executive of ANZCO Foods Limited and has been a Council member since April 2017. Peter has worked in various roles at ANZCO Foods since 1991.



## Tony Egan

Tony is the Managing Director of Greenlea Premier Meats Ltd and has been a Council member since December 2011.



## Fred Hellaby

Fred is Chairman of Auckland Meat Processors Ltd, Managing Director of Wilson Hellaby Ltd and a Director of Mathias International Ltd. Fred has been a Council member since February 2009.



## Gerard Hickey

Gerard is Managing Director of First Light Foods and joined the Council in September 2022.



## Willem Sandberg

Willem is Managing Director of Ovation New Zealand and joined the Council in September 2022.



## Nigel Stevens

Nigel is Chief Executive of AFFCO New Zealand Limited, part of Talley's Group Ltd group of food companies. Nigel has been an MIA Council member since February 2019.



## Willie Wiese

Willie is Chief Executive of Alliance Group Ltd and joined the Council in February 2023.



## Nicky Hyslop

Nicky is a Director of B+LNZ Ltd and joined the MIA Council as an observer in April 2023.

## Council Meetings and AGM

The Association's Annual General Meeting (AGM) was held in Wellington on 14 September 2024. Proceedings saw the unanimous adoption of the 2023 AGM minutes and the 2024 Annual Report, and the changes to the MIA rules. The motion to reappoint KPMG as the Association's auditor for the year ending 30 June 2025, and the election and confirmation of the MIA Council for the 2024/2025 year were adopted.





## Network

The Association is fortunate to be able to draw on considerable expertise within the membership, and there are a number of formal and informal groups that assist the Association on specific issues.

### Directorships, Memberships and Trusteeships

#### **American Chamber of Commerce in New Zealand Incorporated**

Sirma Karapeeva – Director

#### **Beef + Lamb New Zealand Limited / Meat and Wool Trust Limited / NZ Meat Board**

Peter Conley – Director

#### **Beef + Lamb New Zealand Inc**

Chair: Fred Hellaby

**Board:** Sirma Karapeeva (MIA), Alan Thomson and Kate Acland (B+LNZ Ltd), Jason Trewern (Retail Meat NZ), Brigit Corson (Foodstuffs NZ), James Miles (Woolworths NZ Ltd), Rick Walker (ANZCO Foods)

#### **Food Innovations Training Trust**

Nathan Guy, Sirma Karapeeva – Trustees. (Trust being wound up)

#### **MIRINZ Food Technology and Research Incorporated**

Tony Egan, Sirma Karapeeva – Members

### Wholly owned subsidiary Ovis Management Limited

**Board:** Andrew Morrison (Chair), Sirma Karapeeva, Gregory McSkimming, George Tatham, Jason Griffin (Associate Director) (until August 2024), Sophie Henderson (Associate Director) (from August 2024)

**Staff:** Michelle Simpson

### Wholly owned subsidiary Meat Industry Association Innovation Limited

**Chair:** Nathan Guy

**Board:** Sirma Karapeeva

**Staff:** Kaylene Larking

### Wholly owned subsidiary Meat Industry Association Holdings Limited

**Board:** William Falconer

### Strategic Directions Group

**Industry:** Richard McColl (Co-Chair), Kellie Jamison, Sirma Karapeeva, Gary Lindsay, Gary MacLennan, Neil Smith, Alastair Bayliss

**MPI:** Vincent Arbuckle (Co-Chair), Steve Ainsworth, Roger Cook, Allan Kinsella

### Sub-Groups and Committees

#### **Meat Industry Health and Safety Forum**

**Members:** Cushla Beale (AsureQuality), Jason Farrow, Shane Fletcher, Krissy Hansen, Stacey Marsh, Richard McColl, Rachael Morris, Bruce Ramsey, Kass Saimoni, Ross Smith, Amanda Stephens (New Zealand Meatworkers' Union), Kurt Thomas

#### **HR Leaders' Group**

**Members:** Dane Gerrard (Chair), Matt Carter, Craig Coburn, Aaron Craig, Sirma Karapeeva, Kirstie Gardener

**Attendees:** Richard Hellaby, Carolyn Thomson, Sian Williams

#### **Renderers' Group**

Amanda Bignell, Gordon Henderson, Dave King, Tom Macleod, Richard McColl, Jan Paton, Matthew Spence

## Staff



**Sirma Karapeeva**  
Chief Executive Officer



**Kaylene Larking**  
Partnership Manager



**Ashlin Chand**  
Manager Policy and Trade



**Michelle Li**  
Consultant (from April to September 2025)



**Leigh Coleman-Shaw**  
Manager Strategy & Advocacy



**Richard McColl**  
Industrial Operations Data and Insights Manager



**Matt Conway**  
Policy Analyst



**Michael Pran**  
Accountant



**Stephanie Fathers**  
Executive Assistant



**Tatyana Protsenko**  
Industry Training and Workforce Development Senior Advisor (Until October 2024)



**Christopher Guy**  
In-house Legal Counsel



**Yawei Wang**  
Strategic Marketing Manager (from October 2024)



**Chris Houston**  
Principal Policy Analyst (from November 2024)



**Natasha Watzdorf**  
Specialist Advisor: Technical and Regulatory

# Members

Contact details for MIA Members and Affiliate Members can be found on the [MIA website](#).

Members	Affiliate members
Advance Marketing Limited	Abattoirs Association of NZ
AFFCO New Zealand Limited	AgResearch Limited
Alliance Group Limited	Alfa Laval New Zealand Limited
Ample Group Limited	Americold NZ Limited
ANZCO Foods Limited	Amcor Flexibles (New Zealand) Limited
Ashburton Meat Processors Limited	Aon New Zealand Ltd
Auckland Meat Processors Limited	AsureQuality Limited
Bakels Edible Oils (NZ) Ltd	AusPac Ingredients NZ limited
Ballande NZ Ltd	Beca Limited
Blue Sky Meats (N.Z.) Limited	Centreport Limited
Columbia Exports Limited	CMA CGM Group Agencies (NZ) Limited
Crusader Meats New Zealand Limited	CoolTranz 2014 Limited
Davmet (New Zealand) Limited	Global Life Sciences Solutions New Zealand
Evolution Foods Limited	G-Tech Separation Limited
Fern Ridge Limited	GVI Logistics Limited
Firstlight Foods Limited	Haarslev Industries New Zealand
Garra International Limited	Hapag-Lloyd (New Zealand) Limited
GrainCorp Commodity Management (NZ) Limited	High Health Alliance
Greenlea Premier Meats Limited	IBEX Industries Limited
Harrier Exports Limited	Intralox New Zealand
Integrated Foods Limited	Kemin Industries (NZ) Limited
Kintyre Meats Limited	Liquistore (H B) Limited
Lean Meats Oamaru Limited	Maersk A/S
Lowe Corporation Limited	Oceanic Navigation Limited
Mathias International Limited	Port of Napier Limited
Ovation New Zealand Ltd	Port of Otago Limited
Peak Commodities Limited	PrimeXConnect
Prime Range Meats Limited	Pyramid Trucking Limited
Progressive Meats Limited	Rendertech Limited
PVL Proteins Limited	SCL Products Limited
SBT Marketing (2009) Limited	Scott Technology Limited
Silver Fern Farms Limited	Sealed Air (New Zealand)
Standard Commodities NZ Limited	Suncorp New Zealand Services Limited
Te Kuiti Meat Processors Limited	
UBP Limited	
Value Proteins Limited	
Wallace Group Limited Partnership	
Wilbur Ellis (New Zealand) Ltd	
Wilmar Trading (Australia) Pty Ltd	



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