



# Future Food and Fibre Leaders Pulse Check

Kellogg Cohort 53

April 2025



## Purpose

New Zealand Rural Leaders, and specifically the Kellogg programme, have a strong reputation for advancing the leadership pathways of those in the food and fibre sector.

PwC and Rural Leaders saw a need to better understand and amplify what is top of mind for emerging leaders in the sector. Through a bespoke workshop with the Kellogg cohort, a 'pulse check' was taken of the key messages that are top of mind for these emerging leaders.

This document outlines that 'pulse-check', in which five key messages were voted as priorities to share with food and fibre industry and government leaders.

PwC and Rural Leaders thank cohort 53 of the Kellogg programme for their contribution to this first 'pulse-check'. As this is a pilot of this concept, we would appreciate your feedback on how we can improve the 'pulse-check'.

**“To understand and amplify what is top of mind for emerging leaders in the food and fibre sector.”**

## Process



### Disruptors

The Kellogg Cohort brainstormed current disruptors in the food and fibre industry.



### Target audience

A target audience was formed based on a brainstorm of key actors within the sector and what matters to them.



### Key messages

Key messages were developed with this target audience in mind. The top 5 were voted on and then expanded with supporting ideas.

**The following presents the top 5 messages that emerging leaders want industry and government leaders to know...**



## We need to be a part of solutions that...

### Harness rapidly evolving tech in an innovative and producer-centric way

#### Changes in regulation

Advancements in technology need to be encouraged through changes in regulation. Innovative technology can enhance efficiency and productivity, while reducing waste, but requires policy makers to ease restrictions and reduce red-tape.

#### Foreign investment attraction

By easing regulation, we make New Zealand more attractive for foreign investment in tech. It will then be important to incorporate mechanisms to retain talent and profits domestically, so that New Zealand can secure economic benefits and sustainable growth.

#### Supporting producers

We must ensure new technology is used in a socially-conscious and producer-centric way. Adopting technology should augment producers, not replace them. Emphasising equitable access and respect for local values will ensure technology benefits all stakeholders in the NZ food and fibre sector.

### Optimise the use of our natural resources to create sustainable value

1

Ensure waterways are used effectively to balance agricultural productivity with future generational sustainability. Effective management and monitoring can reduce waste in both water as an input and output.

2

Use novel technologies to improve productivity and output. Technologies such as precision agriculture and biotechnology can significantly enhance yield and efficiency, while minimising environmental impact.

3

Match land use to its greatest value creation. Proper evaluation of land allows for strategic planning that optimises its use and maximises productivity without sacrificing sustainability.



## We need to be a part of solutions that...

### Promote stability and continuity in government regulation to increase sector confidence

1

Governments need to plan long term to allow for continuity. Planning beyond election cycles is essential to foster sector confidence and attract investment. Stable and future-proof policies ensure consistent support for industry growth and development, allowing stakeholders to plan effectively.

2

Regulatory frameworks need to be flexible and enable adaptability and innovation. Flexibility permits quick responses to emerging trends and risks, ensuring the sector remains competitive and dynamic.

3

Government decisions need to be balanced and evidence based. Decisions should not be made on assumptions but through using comprehensive data and stakeholder engagement to ensure policy effectiveness and fairness.

### Strengthen our overseas market perception as a premium and reputable exporter

1

We should continue to use New Zealand's renowned clean and green image to reinforce its status as a premium exporter. In the face of global trade uncertainty, we must capitalise on this reputation to enhance market appeal and consumer trust.

2

Demonstrating and showcasing our open and non-threatening export relationships ensures we are viewed internationally as a reliable trade partner. By emphasising transparency and mutual benefits, we can strengthen these international relationships.

3

Promoting our reputable and safe high-quality products is essential in maintaining our market reputation. New Zealand is consistently considered to produce premium beef, lamb, dairy, and wine<sup>1</sup> and it is important to capitalise on this perception.

### Consumer awareness of countries that produce premium food and beverage products within key market<sup>2</sup>

Australia		China		Japan	
Australia	77%	China	63%	Japan	88%
Italy	64%	<b>New Zealand</b>	<b>62%</b>	France	66%
France	64%	France	57%	Italy	55%
<b>New Zealand</b>	<b>53%</b>	Australia	51%	Australia	41%
Japan	47%	Italy	47%	<b>New Zealand</b>	<b>39%</b>
UK	21%	Chile	32%	Canada	31%
USA	19%	USA	30%	USA	22%

1. New Zealand Trade & Enterprise, 2023. <https://www.nzte.govt.nz/blog/research-shows-new-zealands-growing-reputation-for-premium-f-and-b>

2. Awareness in other markets of countries that produce premium F&B <https://my.nzte.govt.nz/article/20240625-what-global-consumers-think-of-nzs-premium-fb-products>



## We need to be a part of solutions that...

### Support and invest in our people through systems uplift and storytelling

- 1 Utilising compelling storytelling strategies can positively reshape the sector perception and attract new entrants into the workforce. By highlighting success stories, career opportunities, and the meaningful impact of the industry, we can attract new talent.
- 2 Providing systems and training that support wellbeing, foster knowledge and skills, and sector growth is essential to develop and maintain a skilled and healthy workforce. Such initiatives should focus on building community within the sector.
- 3 Addressing retention challenges like an ageing workforce and sector perceptions requires implementing robust retention strategies, including career development paths, flexible working conditions, and competitive compensation. Fostering growth opportunities will lead to long-term commitment and satisfaction.

“What we need to do is make sure that we can address [the retention challenge] and have people who come into the sector and want to stay. To feel like they’ve got a path to grow and develop, and that there is a long-term view for them.”

– Lisa Rogers | CEO Rural Leaders



# Please let us know what you think.

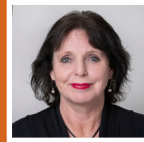
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