

# Food and Fibre value chain diversification

Justine Gilliland  
Chief Executive, Venture Taranaki  
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## Taranaki is home to:

- 109,600 people
- 15,255 businesses
- 49,600 employees
- 555,532 dairy cows
- 434,333 sheep
- And stunning gardens, creative people and lots of sunshine



## Our region creates:

- \$8.1 billion in GDP  
(\$68,427 per person, 2<sup>nd</sup> highest in NZ)
- Slower growth over 2018 year (0.9%)
- Natural protein: dairy, meat and poultry
- Molecular energy: oil and gas
- Manufacturing sector our largest employer
- A fantastic lifestyle





## We're also pretty good at:

- World's fastest windsurfers
- The world's best hospital beds
- Undersea restaurants
- \$20m sculptures
- Quieter trumpets/happier marriages
- Rather good coffee

# What about the future?



## We know things are changing:

- Climate change is understood
- Work underway to eradicate predators
- Changes to our consumption
- And our energy use



And will continue to change:

- The '4<sup>th</sup> industrial revolution'
- The sharing economy
- The circular economy
- The nature of work
- Democratized information





**We also know that this will impact our region:**

- Offshore exploration halted
- Challenges to oil and gas
- And to intensive land use
- Changing nature of jobs and business



# So what are we doing?

# TARANAKI



2050

# TARANAKI 2050 Engagement

15,543  
Video views

29  
workshops



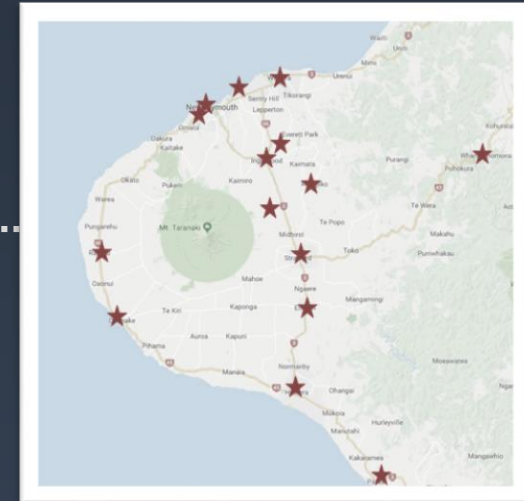
Youth workshop: 11 high schools, 45 kids  
Creative Challenge: 180+ entries

## Taranaki 2050 draft Roadmap feedback

Locations visited	43 locations with 1,022 participants
Email submissions	25 emails representing over 4,000 individuals
Online interactive tool submissions	135 submissions from individuals

## First phase of engagement

Working Groups	457 registered
Exploration Groups	215 registered
Community Survey (events/street/workshop)	271 participants
Roadmap Survey (website – free text option)	147 participants



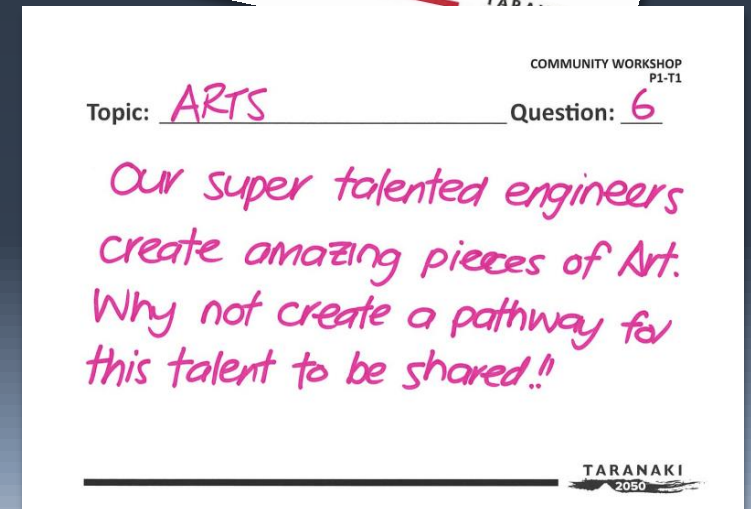
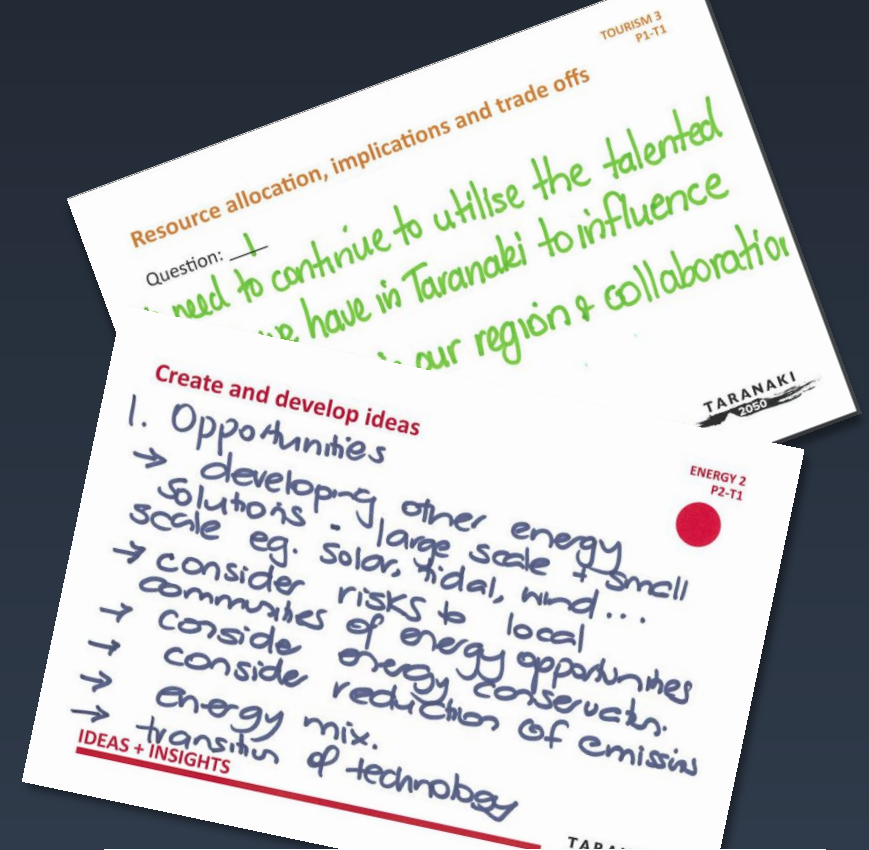
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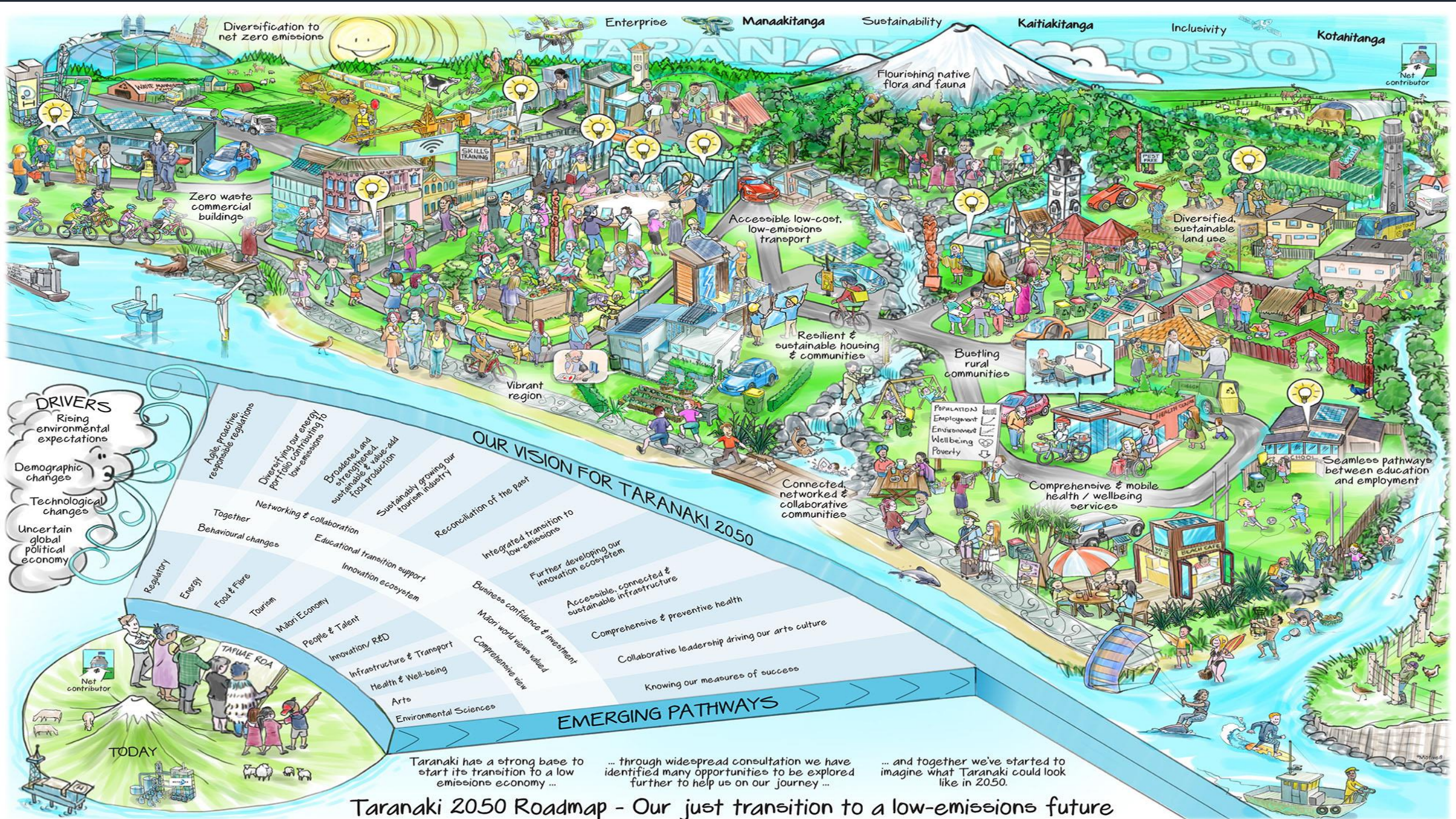
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# Taranaki 2050 Roadmap themes:

- Strong, sustainable environment
- Education options that move & flex with a changing world
- Attractive jobs
- Similar lifestyle to the one we enjoy now
- Lead the way in sustainable, low-emissions energy
- A region that looks out for and cares for itself and its people.







Diversification to net zero emissions

Enterprise

Manaakitanga

Sustainability

Kaitiakitanga

Inclusivity

Kotahitanga



Flourishing native flora and fauna

Zero waste commercial buildings

Accessible low-cost, low-emissions transport

Diversified, sustainable land use

Resilient & sustainable housing & communities

Bustling rural communities

Vibrant region

Seamless pathways between education and employment

Comprehensive & mobile health / wellbeing services

Connected, networked & collaborative communities

OUR VISION FOR TARANAKI 2050

EMERGING PATHWAYS

Taranaki has a strong base to start its transition to a low emissions economy ...

... through widespread consultation we have identified many opportunities to be explored further to help us on our journey ...

... and together we've started to imagine what Taranaki could look like in 2050.

Taranaki 2050 Roadmap - Our just transition to a low-emissions future

**DRIVERS**  
Rising environmental expectations  
Demographic changes  
Technological changes  
Uncertain global political economy

Agile, proactive, responsible regulations  
Diversifying our energy portfolio contributing to low-emissions  
Broadened and strengthened sustainable & value-add food production  
Sustainably growing our tourism industry  
Networking & collaboration  
Educational transition support  
Innovation ecosystem  
Regulatory  
Energy  
Food & Fibre  
Tourism  
Maori Economy  
People & Talent  
Innovation R&D  
Infrastructure & Transport  
Health & Well-being  
Arts  
Environmental Sciences

Reconciliation of the past  
Integrated transition to low-emissions  
Further developing our innovation ecosystem  
Accessible, connected & sustainable infrastructure  
Comprehensive & preventive health  
Collaborative leadership driving our arts culture  
Knowing our measures of success  
Business confidence & investment  
Maori world views valued  
Comprehensive view



TODAY

TAPIAE ROA

Net contributor





## Our region's economic development strategy

- 4 Futures:  
Energy, Tourism, Food, Māori Economy
- 4 Foundations:  
People, Connectivity, Liveability,  
Investment

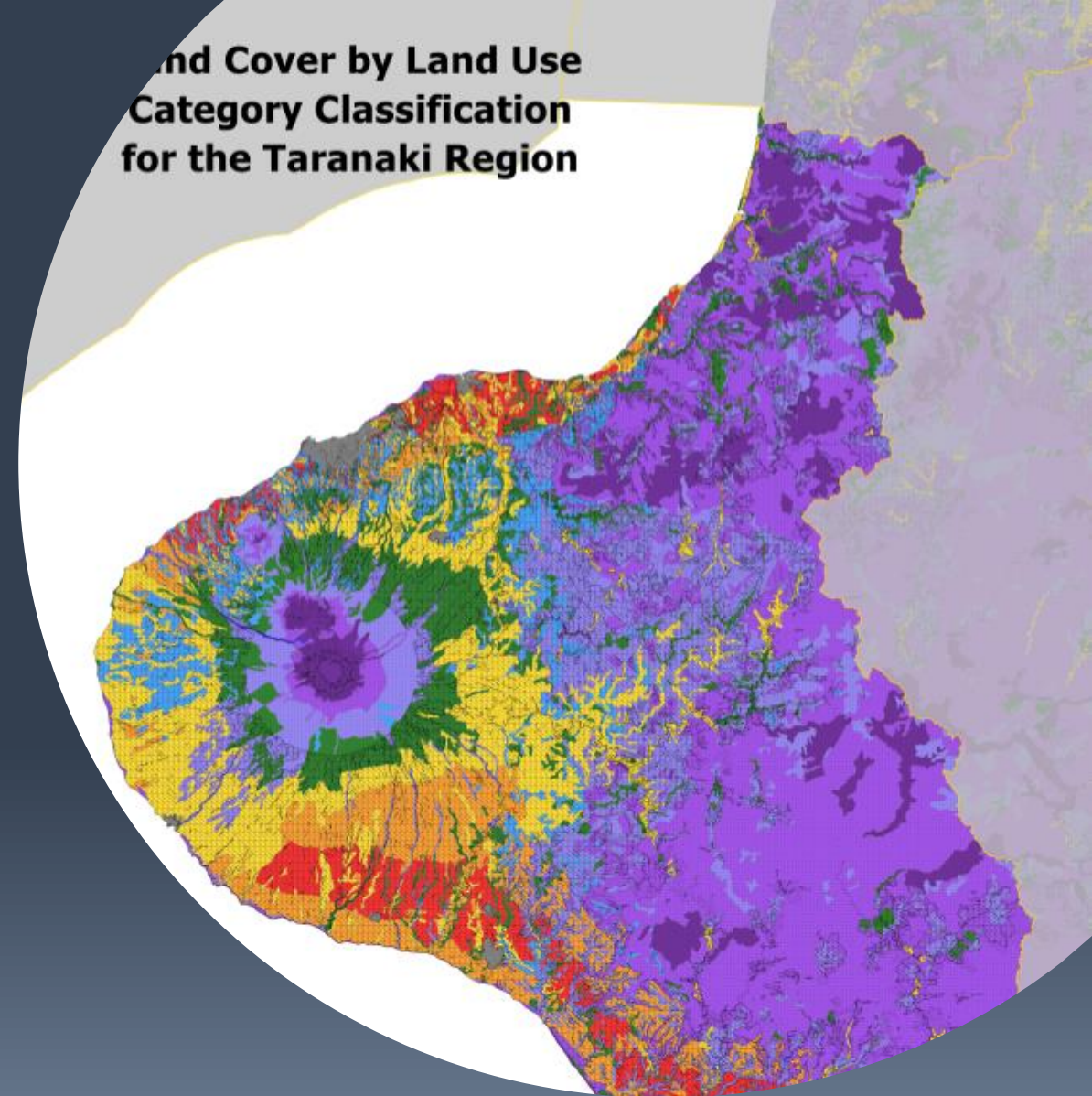
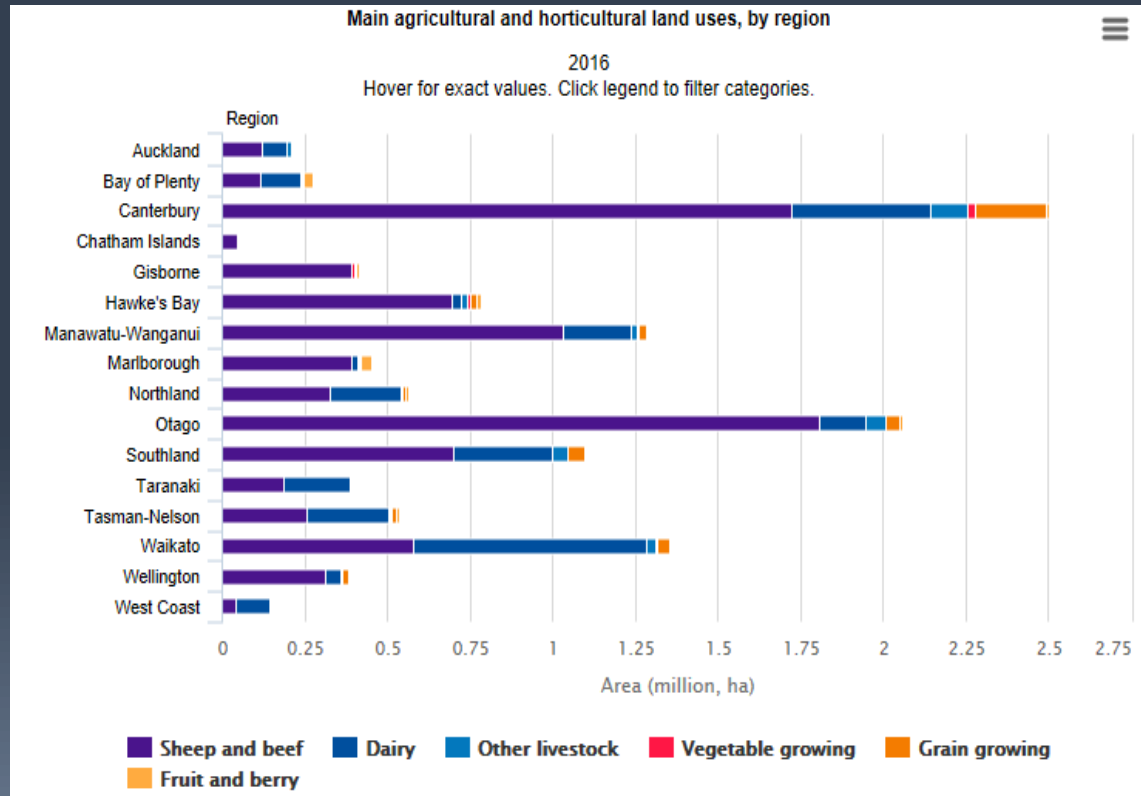


## Tapuae Roa actions VT is leading:

- National New Energy Development Centre
- H2 Roadmap
- Innovation Ecosystem
- Food Futures Capability
- Food and Fibre diversification
- Talent
- Investment Prospectus
- Event Strategy
- Taranaki Story

# Taranaki land use: current state

## Land Cover by Land Use Category Classification for the Taranaki Region



Main Agricultural and Horticultural Land Uses, by Region 2016  
New Zealand's Environmental Reporting Series, Environmental Indicators, Statistics NZ

Land Cover by Land Use Category Classification for the Taranaki Region  
Ministry of Primary Industries



# Why change?

- Land-owner, community and consumer demand
- Future proofing and resilience (*Tapuae Roa*)
- Meeting future consumer needs
- Regional aspiration for diverse and sustainable food & fibre sector
- Adding value within Taranaki
- Telling our Taranaki story
- Declining farming/food GDP (Infometrics, May 2019)
  - 10% GDP 2001 - 2018
  - 16% employment 2001 -2018

# In New Zealand we grow value

Export Value  
\$42 Billion



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Estimated Retail Value  
\$0.25 Trillion



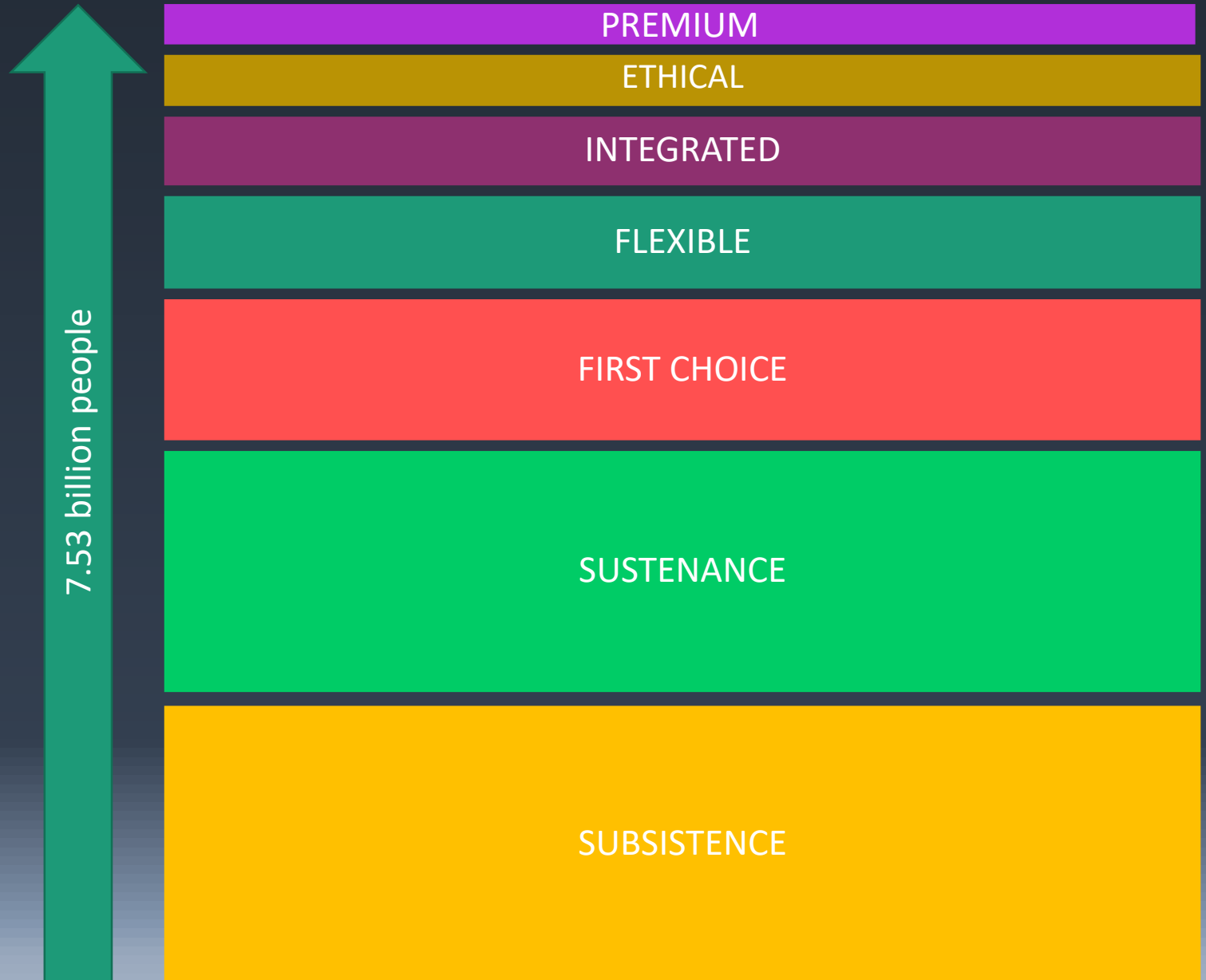
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6.5 Times

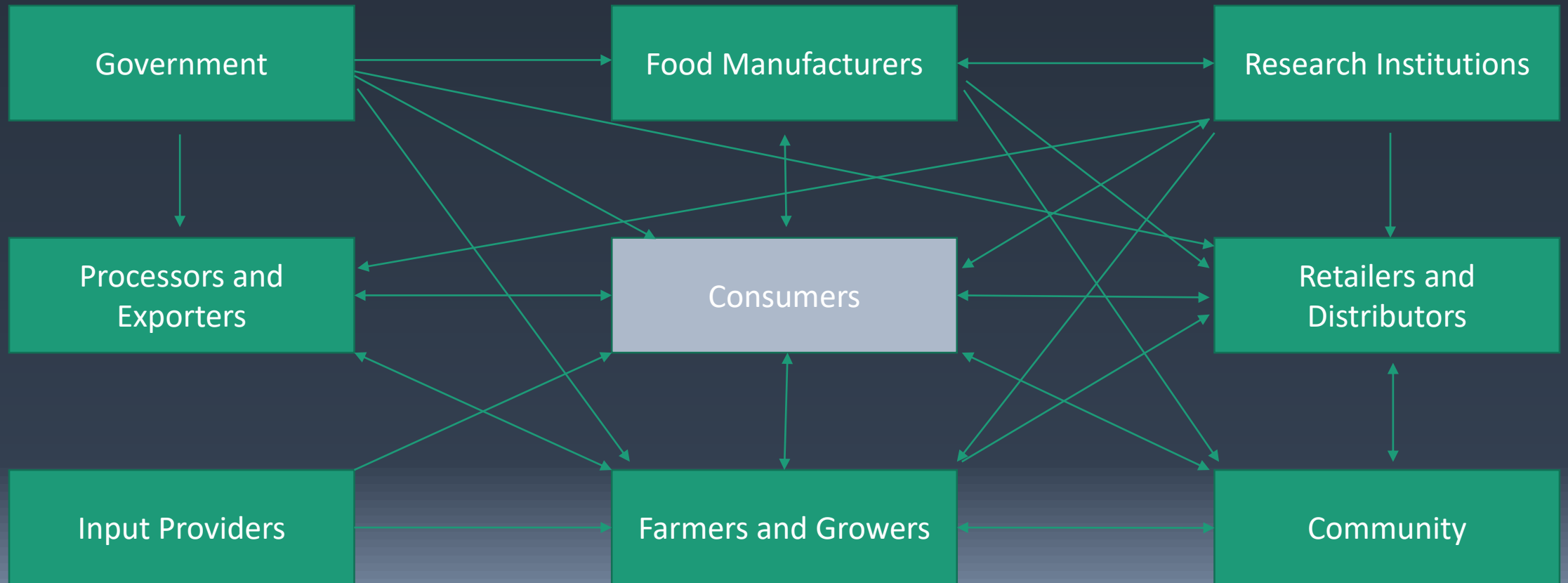
## But our challenge has been capturing value

# The Primary Food System Streams

Comprise millions of niches



# The connected consumer now sets the agenda





# Diverse, global consumers



Animal welfare



Organic content



Feed the world



Clean food



Genetic change



Demographics



Health/wellness



Farming practices



Food safety



Incomplete understanding



Affordability



Novel taste/texture

# Examine Every Fundamental

The opportunity is huge: the world wants what NZ can do



Nature of a farm

How we farm

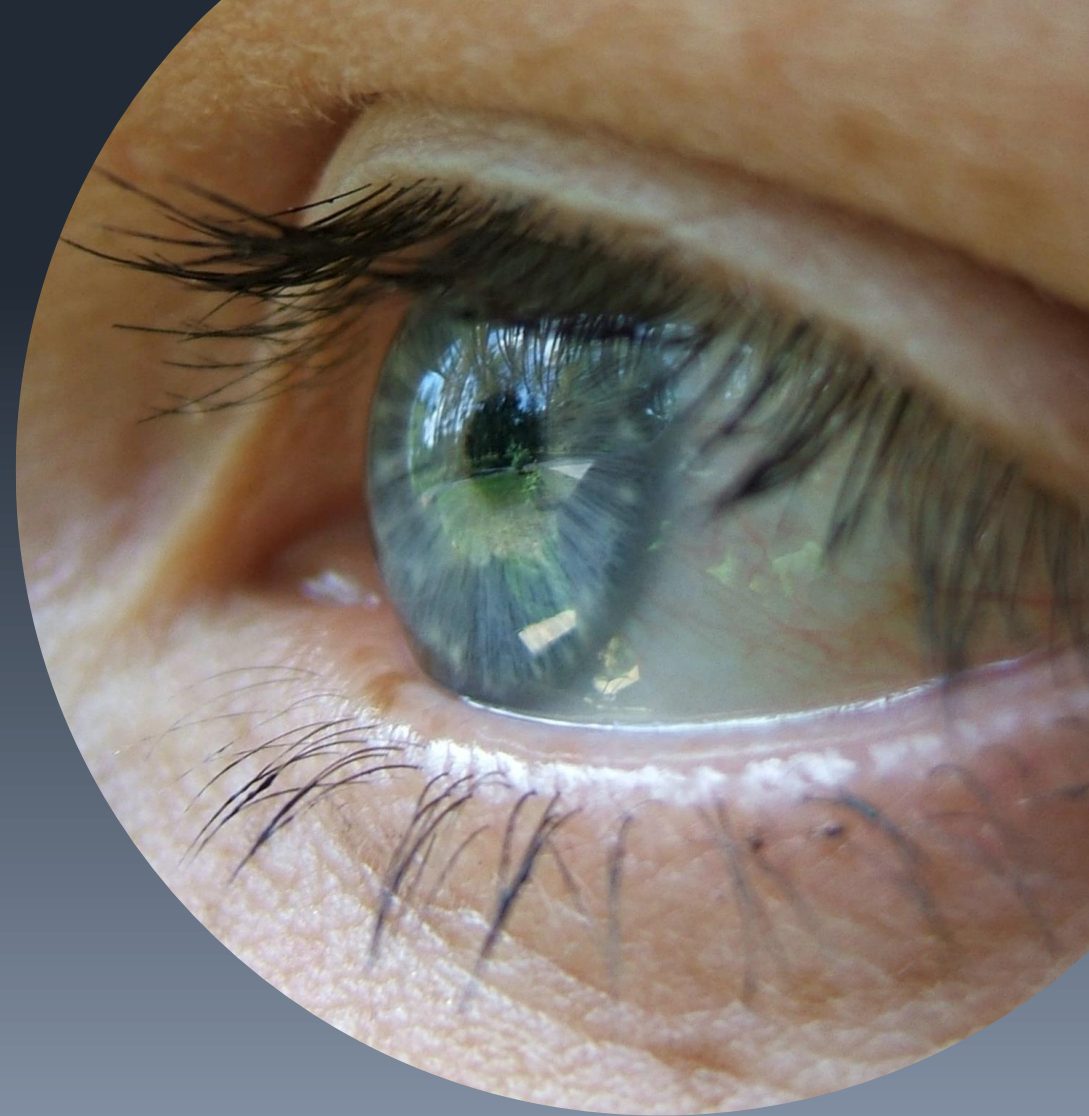


Products grown

Processing and distribution



Consumer and consumption



# “Branching out” – diversifying and adding to Taranaki’s food and fibre value chains

To investigate the addition of complementary commercial food & fibre enterprises to Taranaki value chains and land-uses

- Colliding Taranaki farmer and food marketer product aspirations with NZ ‘know-how’ and coming up with some great ideas
- Agreeing criteria for selection of complementary enterprises
- Shortlisting 10-12 opportunities with potential for Taranaki
- Researching key opportunities – feasibility, market opportunity, complementarity, investment and consumer demands

To support the emergence of new value chains within the region

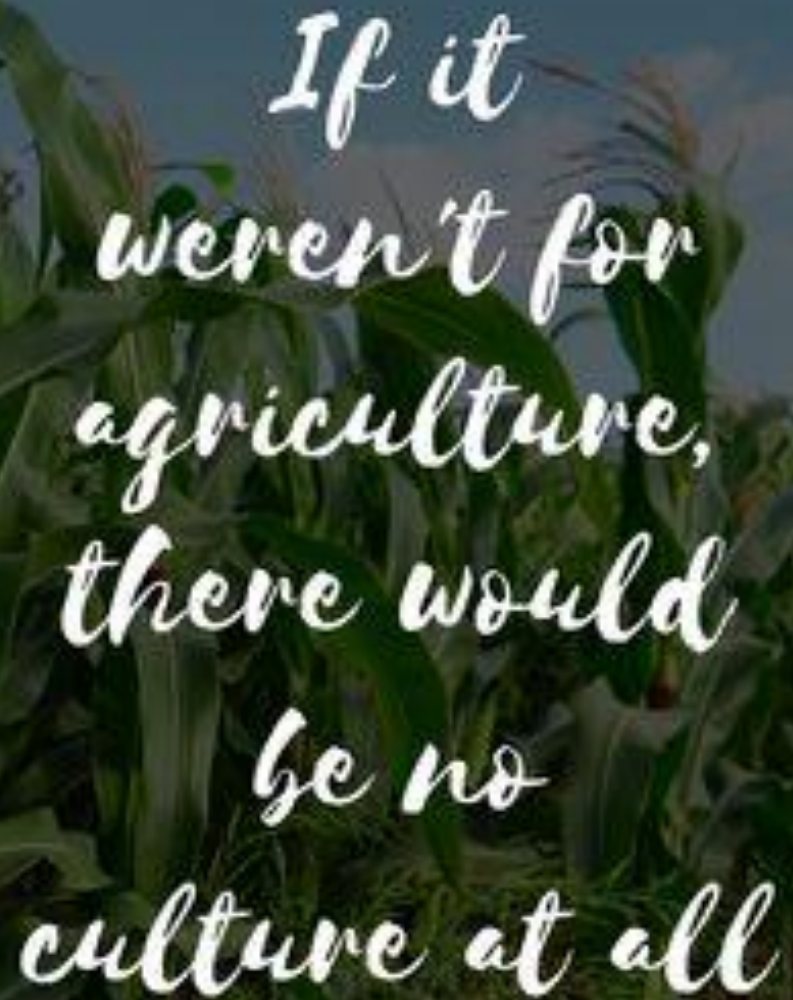
- Piloting and sharing grounded experience
- Capability development and ‘regional toolkits’ for ongoing support of new enterprise

# Outcomes

1. On-the-ground food and fibre value chain diversification
2. At-scale, cross-region collaboration, behavioural shift and action
3. Tools, data and information regarding complementary commercial enterprise
4. Per-opportunity studies, pilots and blueprints
5. Capability development and systems to sustain ongoing capability development







*If it  
weren't for  
agriculture,  
there would  
be no  
culture at all*

ELWYNN TAYLOR

“Tomorrow is the most important thing in life. It comes to us clean at midnight; it’s perfect when it arrives and it puts itself in our hands. It hopes we’ve learned something from yesterday.”

John Wayne