SPRING SHEEP
— MILK CO. —
New Zealand

‘SCALE UP’

SFFF MID-TERM PROGRAMME REVIEW

Primary Purpose

REPORT

June 2025



“I think there is huge potential for sheep milking in New Zealand. I really do hope that we are the first of many that say, you know what, this is better, it's better for the land, it's better for the people, it's just better, you know? I genuinely believe that.”

Stakeholder interview

Disclaimer:

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1. About this report

This report contains the findings of a mid-term review of the Scale-Up sheep milking project funded by Spring Sheep Ltd and MPI through the Sustainable Food and Fibre Futures programme (SFFF).

Intent

This mid-term review is designed to assess the progress, relevance, and strategic alignment of the Scale Up programme at its halfway point. It serves to evaluate whether the programme is on track to deliver its intended outcomes across multiple workstreams—particularly in relation to market development, product innovation, advanced sheep genetics, and regional development. The review also provides an opportunity to reflect on external factors influencing performance and to recalibrate effort where needed. Fundamentally, it is intended to ensure accountability and support continuous improvement.

Approach

The review combines qualitative and quantitative assessment methods to examine progress against agreed milestones and KPIs, as outlined in the original business case and contractual documentation. Approach included a background document review, interviews with key stakeholders, and examination of internal programme reports. Emphasis has been placed on what is working, what requires adjustment, and how the programme may be better positioned to achieve long-term goals and impact. The process was intended to be both reflective and forward-looking, supporting collaboration between the Crown and the commercial partner, Spring Sheep, in adapting to challenges and pursuing opportunities.

Structure

This report is structured as follows:

- An overview of the programme background and objectives
- A summary ‘scorecard’ assessment of overall programme mid-point progress
- A detailed assessment of workstream and sub-project progress
- An assessment of programme governance and management performance
- Conclusions and recommendations for continuous improvement

Acknowledgements

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2. Executive summary

This mid-term review evaluates the progress of the Scale Up Programme, now at its halfway point (2022-2027), amid what has been a challenging global operating environment. Over the past 18 months, the programme has had to navigate a period of economic uncertainty, inflationary pressure, disrupted supply chains, and cautious investor sentiment—factors that have influenced delivery across multiple workstreams. Despite these headwinds, the programme has maintained strong strategic focus and demonstrated agility, with encouraging signs now emerging that market conditions may support renewed momentum in the second half of the programme.

One of the programme's significant achievements has been the successful retail launch of infant formula into premium retail channels in China. This was enabled through SAMR (infant formula food safety part of the previous Sheep Horizon 3 SFFF programme, and by Scale-Up programme insight research that identified premium and super premium retail channels over highly competitive mas market retail in China. Spring Sheep are only the second entity with SAMR registration for sheep milk and retail product in this highly regulated and strategically important market.

This milestone is seen as both a technical and commercial breakthrough, opening the door for long-term revenue growth, through previously inaccessible retail channels.

Emerging traction in target markets signals confidence in New Zealand's sheep milk proposition. As economic conditions begin to stabilise, reviewers believe the programme is well-placed to scale these opportunities.

Product innovation has also progressed, in multiple areas despite regulatory and input cost challenges. Three new NZ sheep cheeses, Southern Light (Havarti style) Pecorino and Ossau Irarty have been developed and trialled for anticipated US market launch following NZ market testing.

With improving supply conditions and greater market certainty, the programme now needs to accelerate commercial launches to capitalise on product readiness and first-mover advantage.

The genetics workstream remains a programme strength. The Zealandia breeding programme has delivered measurable gains in milk yield and breeding index accuracy, backed by a maturing performance recording platform (Dtreo). Expansion of artificial insemination trials has been paused with existing breeding systems more than meeting requirements.

The most significant constraint has been in farmer conversion and regional expansion, particularly in Taranaki. Economic conditions have compounded existing barriers—such as capital costs, land use caution, and infrastructure gaps resulting in only two of the targeted ten new suppliers being onboarded to date.

While engagement and regional partnerships are in place, further investment in on-farm incentives, conversion support, and clearer ROI messaging will be required to unlock growth in this area.

Programme governance and management have responded well to difficult conditions, making deliberate decisions to pause or re-sequence workstreams where appropriate. The team's ability to balance ambition with commercial realism, ensuring resources remained aligned with market readiness, is noted.

The programme has continued to invest in farm R&D, with multiple trials completed and ongoing across regions. More structured knowledge transfer will be essential to lift adoption and visibility among farmers.

Looking ahead, signs of improving market conditions—including softening freight costs, renewed investor interest, and increasing demand for alternative nutrition products are likely to boost the programme's performance trajectory.

The groundwork laid over the first half provides a strong platform from which to scale market growth, accelerate product commercialisation, and expand the supplier base.

In summary, while global market volatility has constrained delivery in some areas, the programme remains broadly on track to achieve its strategic goals, particularly in genetics, market development, and innovation.

To realise its full planned impact, the next phase will require targeted investment in farmer conversion, faster speed-to-market for new products, and strong alignment between supply capability and commercial growth.

Although the original targets may not be fully achieved within the five-year timeframe, improving market conditions place the Scale Up Programme in a strong position to consolidate progress and deliver lasting value to New Zealand's developing sheep dairy industry.



Recommendations

The following recommendations are made to support success in the second half of this programme. These are further expanded in the conclusions and recommendations section.

1. **Focus on Speed-to-Market for New Products**

   Prioritise the commercial launch of market ready products (e.g. Chinese infant formula products and sheep cheeses to the US), leveraging regulatory and market access wins to convert technical work into sales.

2. **Rebuild Market Momentum While Activating New Markets**

   Build on SAMR registration and retail channel launch in China with deeper in-market activity, while advancing registration and go-to-market plans in USA and Saudi Arabia.

3. **Prepare to Reactivate Farmer Conversion Through Targeted Support**

   Prepare to restart farmer recruitment as demand returns. Offer targeted conversion support including financial modelling, financing options, infrastructure co-investment, and tailored advice. Convert farmer focussed research into practical tools, guides, and training to improve farm performance and build confidence.

4. **Reassess Regional Strategy with PKW and Key Partners**

   Engagement in Taranaki has slowed, and PKW has deferred on-farm conversion and is reducing flock size. There is a risk that regional momentum will dissipate without a refreshed plan.

5. **Continue Agile Governance and Forward Planning**

   Focus Programme Governance Group and management to realisation of commercial growth opportunities and support long-term strategy beyond the programme window, including succession planning, post-programme investment, and sector-wide communication and alignment.

3. Introduction

Programme overview

The Scale Up Programme is a five-year initiative (2022–2027) jointly funded through the Sustainable Food and Fibre Futures (SFFF) fund and led by Spring Sheep Milk Co. Its primary aim is to accelerate the development of a world-leading sheep dairy industry in New Zealand by removing scale and capability barriers that inhibit sector growth. The programme builds upon earlier proof-of-concept work (SFFF Project: Sheep Horizon 3) and seeks to cement economic, environmental, and social benefits across the supply chain.

At its core, the programme is designed to validate and de-risk a scalable production and business model for sheep dairy farming. It focuses on four interrelated workstreams:

1. **Global Market Development** – expanding into high-value international markets, particularly across Asia.
2. **New Product Development** – supporting innovation in sheep milk product formats for export markets.
3. **Farmer Conversion and Regional Development** – enabling new farm conversions with strong regional support, particularly in Waikato and Taranaki.
4. **Farm R&D and Training** - on-farm insights, supporting farmer capability, and driving productivity gains through research trials, benchmarking, and workforce development
5. **Advanced Sheep Genetics** – introducing and proving high-performance dairy sheep genetics suitable for New Zealand conditions.

Key objectives:

Key objectives as identified in the business case include:

- Establishing a cost-effective and scalable sheep milking farm system.
- Demonstrating strong farmer and regional uptake to support industry growth.
- Developing a suite of products with validated market demand.
- Building a recognised premium brand in global markets for NZ sheep milk.

Milestones and targets:

Milestones and programme targets as described in the MPI contract include:

- Expansion into three priority export markets, with associated product listings and channel development.
- Onboarding of at least 10 new commercial suppliers by 2026

- Commercialisation of multiple new sheep milk products.
- Development of a next-generation high-performance dairy ewe through the breeding programme.
- Deployment of regional extension and training support in partnership with industry stakeholders.

Programme structure

The following table is drawn and summarised from the SFFF partnership grant agreement (2021) and outlines the initial contracted programme of workstreams and projects. Note: this describes the programme at outset. Changes in programme and project structure have occurred and are detailed within the body of this report.

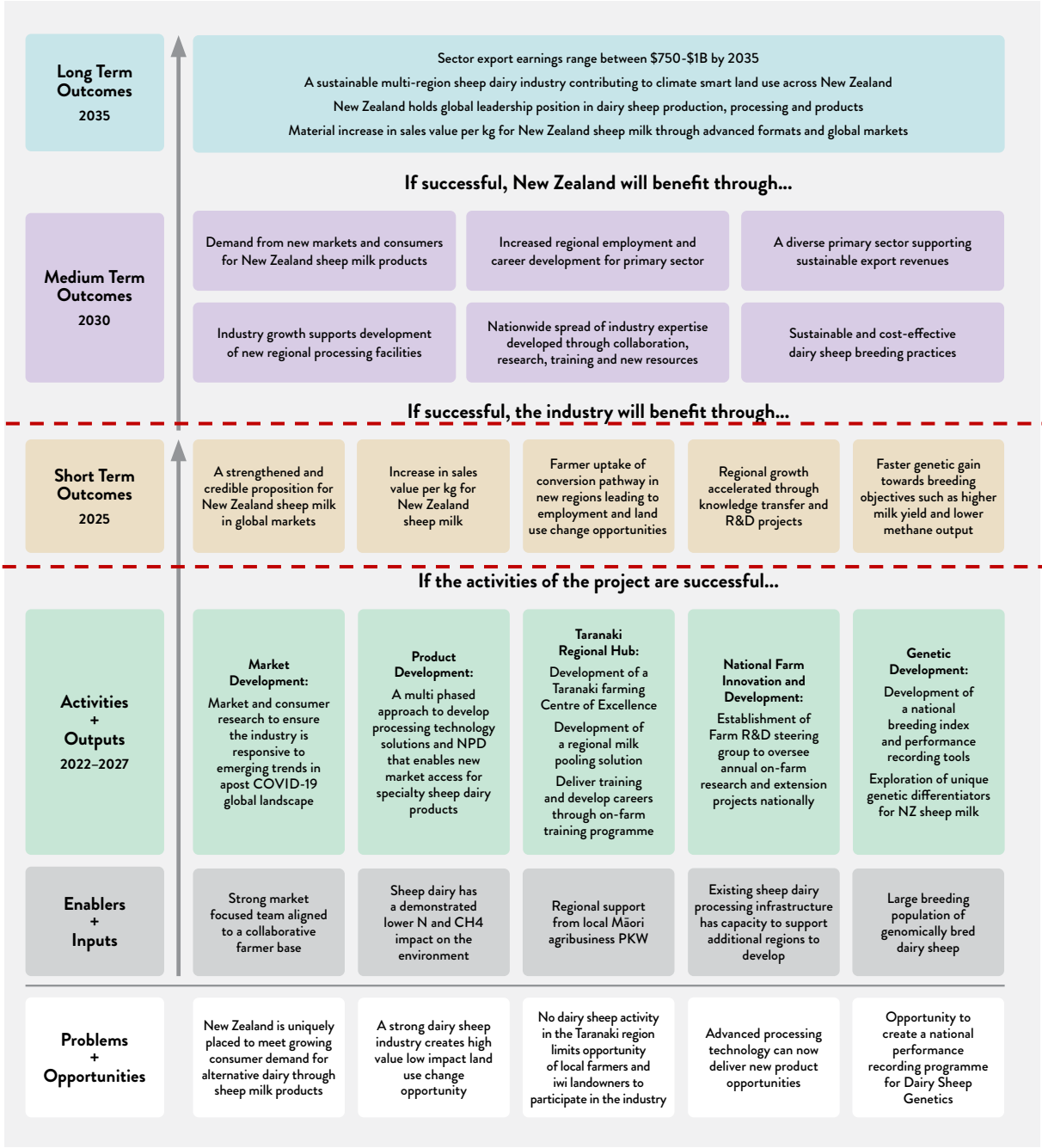
Table 1: Structure at outset

Workstream	Project	Intent
New market development	New market development and expansion	Targeted market research is intended to identify the next major international growth opportunity, strengthen understanding of New Zealand sheep milk consumers, and inform product launch strategies; additional research will support existing markets and guide new product development and market access planning.
	Sheep association publication, and content creation	Establish and manage a publication platform to regularly share research findings and industry-relevant material, supporting the growth of the New Zealand dairy sheep sector and contributing to a robust, accessible body of knowledge.
New product development	Advanced formulation for new markets	Develop an infant formula for a new market, including animal testing to assess regulatory compliance, followed by human trials to confirm safety, suitability, and alignment with market entry requirements.
	Unlocking sheep milk secrets	Advance scientific research into the benefits of sheep milk to explore a high-priority commercial opportunity. If findings are supportive, develop, formulate, and test new products based on the research, including consumer and in-market testing, to enable commercialisation and support a targeted product launch.
	Advanced sheep milk secrets	Use research insights to guide the development of a new sheep milk format, including product and packaging trials, regulatory compliance, and formulation work. Develop a product and commercialisation strategy aligned with research, with potential for trial and market entry.
Taranaki regional development	Taranaki extended transport	Trial advanced tanker scheduling and transport technology solutions to improve logistics efficiency and reduce emissions and transport costs.
	Taranaki regional Hub education and RND Centre	Establish and operate a regional hub site in partnership with PKW to support farmer engagement, public education, and industry development through open days, supplier

		meetings, training programmes, and regional events.
	PKW relationship and in kind	Support PKW to develop two dairy farms by the end of 2022–23, with ongoing delivery of quarterly in-kind reports and annual activity plans. Establish a Taranaki Regional Steering Committee with terms of reference confirmed
	Regional milk pooling and transport solution	Investigate and trial a best-value pilot solution—such as heat treatment or reverse osmosis—to reduce tanker trips between Taranaki and Waikato, including on-site process validation, commissioning of a pilot facility, and assessment of ongoing milk pooling costs and inter-regional feasibility.
National farm training, research and development	Dairy sheep industry training module	Establish a certified training programme in partnership with a suitable provider, with continuous improvement based on feedback. Enrol eight students each season, aiming for six completions annually, to build skills, confidence, and employability across the dairy sheep industry.
	Region specific R&D programs	Establish a National Farm R&D Steering Committee with clear terms of reference for funding allocation and project approval. Support R&D projects in Waikato, Canterbury, Taranaki, and Wairarapa to improve industry understanding and develop best practice standards across the dairy sheep sector.
	Life cycle assessment	Lifecycle assessment of dairy sheep farming, and post-farm environments.
	Canterbury and Southland	Establish relationships with growers in Canterbury and Southland to deliver training and R&D programmes, with annual reporting on regional R&D investment and outcomes.
Advanced dairy sheep breeding breeding strategies	The genetics tech stack	Develop and support a cost-efficient digital genetics recording platform for Zealandia dairy sheep farmers, with expanded functionality and trait processing to enable improved genetic decision-making and on-farm gains across the industry.
	Advanced breeding strategies	Conduct large-scale artificial breeding trials across multiple Zealandia flocks, including cervical AI, with successful approaches scaled to support wider farmer adoption. Refine breeding techniques to improve conception rates, reduce costs, and increase access to diverse and targeted sire lines aligned with specific genetic goals.
	Nucleus breeding flock development	Operation of three nucleus breeding flocks as elite recording herds providing progeny tested sire Rams and genetic material to the growing Zealandia breed
	Reducing farm emissions	Development of methods and standardisation of environmental practises for low methane emitting sheep. Climate smart farming systems life cycle assessment measurements of dairy sheep farming and post farm environments.

Intervention logic model

Figure 1 below show the intervention logic model employed in the Scale-Up business case and recognised in associated contract delivery targets.



4. Programme Progress

At the halfway point of the Scale Up Programme, there is evidence of good progress in several strategic areas alongside persistent challenges in others. The programme has demonstrated its ability to adapt under pressure - navigating global market volatility, regulatory complexity, and delivery constraints. This while maintaining a clear focus on its long-term objectives. The following high-level assessment summarises the programme's overall performance to date, drawing on reporting data, stakeholder feedback, and milestone tracking across all major workstreams.

Table 2 below shows overall assessment of the Scale Up programme at mid-point against the mid-point (2025) objectives in the business case. These assessments are further detailed within the report.

Table 2: Assessment of mid-term progress

	Mid-term (2025) objectives	Assessment
	A Strengthened and Credible Proposition for NZ Sheep Milk in Global Markets	**Achieving – at lower trading volumes**
	Increase in Sales Value per Kilogram for NZ Sheep Milk	**Tracking positively**
	Farmer Uptake of Conversion Pathway in New Regions (Employment & Land Use Change)	**At risk – slower than targeted**
	Regional Growth Accelerated Through Knowledge Transfer and R&D Projects	**At risk – slower than targeted**
	Foster Genetic Gain Towards Breeding Objectives (Higher Yield, Lower Methane)	**Achieving**

What has gone well?

This section outlines areas identified as significant to the future success of the programme. These are further detailed within the workstream analysis in the next section.

China infant formula retail launch

In China, infant formula products, both domestically produced and imported, are required to obtain a registration certificate from the State Administration for Market Regulation (SAMR) allowing retail sales. Achieving this registration in China in 2024, pursued under the previous Sheep Horizon 3 SFFF programme enabled development and retail launch of New Zealand sheep milk infant formula products in late 2024. Thia is recognised as a major milestone for Spring Sheep and the broader New Zealand sheep milk industry.

The successful SAMR registration, described as a complex and protracted process, positions Spring Sheep as one of only two non-Chinese companies authorised to place sheep milk infant formula into Chinese retail channels. Achieved under the Sheep Horizon 3 initiative and activated through the Scale-Up Programme, this milestone can be viewed as a major turning point. Enabling access to China's high-value infant formula market, and unlocking projected revenue streams, and building confidence in the viability of New Zealand's sheep dairy sector.

The Scale-Up Programme has played a pivotal role in shaping the China commercial activation strategy. In parallel with the regulatory process, the programme invested in consumer insights work in China to inform a targeted market entry. This research revealed that despite declining birth rates, opportunity remains within the premium and super-premium segments, particularly independent high-end mother-and-baby retail stores, where price points were holding.

Strategic shifts

Throughout the first half of the programme, the Scale Up team has demonstrated a clear capacity for strategic change, making a series of deliberate pivots in response to market conditions, implementation challenges, and learning. One of the most notable shifts has been from a volume growth model to a value-led approach balancing supply against weaker than anticipated demand. There has been a prioritisation of premium markets, higher-margin products, and long-term brand positioning in readiness for a return to the fundamentals identified in the business case of future demand for sheep milk products.

This market led shift was accompanied by a decision to slow the pace of farm conversions and regional expansion, particularly in Taranaki, in favour of consolidating readiness and support systems. The programme also adopted a measured and patient approach to new market entry, focusing on resilience while regulatory approvals and brand development matured. Internally, the programme has successfully realigned its workstream priorities, concentrating on core areas of genetics, on-farm performance, and product commercialisation, while pausing or slowing lower-impact initiatives. Governance and management systems have supported this agile approach, allowing decisions to be made in real time and ensuring strategic discipline remained aligned with evolving programme realities.

What have the biggest challenges been?

This section identifies key challenges faced by the programme from inception to mid-point. These are shown below in high level form and expanded in greater detail within section 6 detail on workstream progress.

1. External Market and Economic Volatility

Challenge:	Ongoing uncertainty in global trade and economic conditions.
Underlying Issues:	Freight costs, inflation, and consumer demand shifts.
Implication:	Increased risk to commercial forecasts and investment confidence—though mitigated by emerging positive market demand signals

2. Supplier Expansion

Challenge:	The programme has onboarded five new commercial suppliers by mid-2025—only half of the original milestone target.
Underlying Issues:	High capital costs, land-use change hesitancy, uncertain farmer ROI, and the need for more robust demonstration of farm profitability
Implication:	Delayed sector expansion and risk to achieving full supplier scale targets by 2027.

3. Regional Development in Taranaki

Challenge:	Slower-than-expected progress in establishing sheep dairy activity in Taranaki.
Underlying Issues:	Infrastructure gaps, need for stronger local extension, and limited conversion momentum despite engagement efforts.
Implication:	Risk to achieving regional diversification and wider industry uptake.

4. Variability in Farm Performance

Challenge:	Large variation in productivity and profitability across supplier farms.
Underlying Issues:	Differences in farm systems, experience, and implementation of best practices.

Implication:	Need for more targeted technical support and benchmarking tools to lift performance and reduce risk for new entrants.

5. Artificial Insemination (AI) and Genetic Scaling

Challenge:	Slower rollout of scalable AI systems and incomplete integration of genomic data into all farm systems.
Underlying Issues:	Technical bottlenecks, skill gaps, and system complexity.
Implication:	Limits the speed at which genetic gain can be realised across the wider commercial base.

6. Infrastructure and Supply Chain Constraints

Challenge:	Constraints in on-farm and processing infrastructure, especially for new suppliers or regions.
Underlying Issues:	Supply chain delays, cost escalation, and co-investment barriers.
Implication:	Limits farm conversion rate and overall industry capacity expansion.

5. Workstream progress

The following section provides a detailed assessment of performance across each workstream, highlighting areas of success, emerging challenges, and key developments that will shape the final phase of delivery.

Global Market Development

At the mid-point of the Scale Up Programme, the Global Market Development workstream has made progress against the objectives outlined in the original business case, despite navigating a highly complex and shifting global trade environment. The business case called for a deliberate reduction in reliance on China by developing two new international markets, with priority placed on infant formula in China and the Middle East, and cheese or nutritional products in the USA

China has however remained a central focus due to its scale and strategic value, and the programme achieved a major milestone with SAMR registration, enabling entry into the tightly regulated infant formula category. Although regulatory changes (such as new 'Guobiao' (GB) Chinese standards) disrupted parts of the sector and affected some ingredient sales, Spring Sheep is now well-positioned to rebuild momentum and activate consumer-facing brands in-market.

Progress in the United States required a strategic pivot. Originally targeting infant formula, the team has refocussed towards specialty cheese, recognising significant regulatory barriers and quota constraints in the formula category. This shift appears viable, with growing consumer interest and a clear niche market opportunity. Similarly, the Middle East—particularly Saudi Arabia—has emerged as a good prospect for infant nutrition, based on demographic demand, premium pricing potential, and cultural compatibility with sheep milk products. Although one early partnership was lost, market fundamentals in this region remain favourable.

Challenges in this workstream have included protectionist trade policies, geopolitical disruptions (e.g. US tariffs, the Ukraine and Middle East conflicts), associated weakened consumer confidence and demand leading to fluctuating milk powder pricing. These externalities required agile planning, robust internal governance, and careful timing of regulatory and commercial decisions. Internal alignment also required time, particularly when business case pivots needed both Spring Sheep and PGG board-level approval.

Despite these headwinds, Spring Sheep is successfully establishing a diversified market footprint, with commercial activity now underway or in development in multiple markets. Interviews and reporting confirm a disciplined and agile market development approach, balancing responsiveness to market signals with long-term brand building.

Looking forward towards the remainder of the programme, the outlook remains positive. Key markets are now unlocked or in late-stage development, consumer demand indicators are more encouraging, and the programme has demonstrated both strategic clarity and execution capability. To fully realise business case objectives, continued focus on partner development, regulatory navigation, and rapid product activation will be essential.

New Product Development

At the mid-point of the Scale Up Programme, the New Product Development (NPD) workstream has made progress in expanding the range and depth of sheep milk-based product offerings, aligned to both domestic and international market opportunities. Interview feedback and programme reporting indicate that the NPD function is playing a strategic role in supporting market development, brand credibility, and commercial value.

Product development under the Scale Up programme has focused on two key areas: infant formula for the Chinese market and specialty cheese for the US. Following the successful SAMR registration, Spring Sheep completed commercial development, production and launch of a compliant infant formula range into China in late 2024. Simultaneously, the team developed and trialled three US focussed sheep cheese recipes. Product development has emphasised regulatory readiness, market fit, and nutritional differentiation to support positioning in both markets.

Work has advanced on infant nutrition products, including infant formula and other nutritional powders. The achievement of SAMR registration and product placement in China has created a viable path to market, with formulation refinement and safety validation forming a critical part of this workstream. Stakeholders expressed confidence in the scientific and technical robustness of these products, though acknowledged the process has been complex and time consuming.

Research findings, particularly around the nutritional benefits of sheep milk are beginning to influence product development direction. It was noted that the team is increasingly looking to link R&D insights with commercial formulation, especially in functional and health categories. However, a recurring theme in both interviews and reporting is the need to accelerate the translation of product concepts into market-ready SKUs, particularly for newer high-value formats.

From a capability standpoint, the NPD team is seen as well-integrated and effective, collaborating across market, regulatory, and operations teams. Processes are considered agile and iterative, with improvements made in response to consumer insights and technical feedback. However, it was noted that limited manufacturing flexibility and regulatory hurdles can slow speed-to-market, especially for novel product formats.

In summary, the New Product Development workstream is delivering on key programme commitments and is well positioned to support growth in targeted markets. Continued progress will depend on scaling pilot successes into full commercial launches, leveraging health-based claims, and reducing the time from concept to market. With a growing foundation of validated product ideas and supporting research, the second half of the programme presents a critical window to fully capitalise on this development work.

Regional Expansion and Taranaki Development

At the midpoint of the Scale Up Programme, progress on regional expansion, particularly the Taranaki development pathway, has been slower than originally anticipated. While the programme overall continues to prioritise broader industry uptake and regional diversification, a number of structural and market-based challenges have slowed momentum.

Several interviewees noted that the programme has wisely chosen to deliberately slow the pace of conversion in order to balance supply and demand, and consolidate early learnings. While this has impacted programme mid-term targets, it has allowed for a more strategic, phased approach to growth—focusing on readiness, farm system profitability, and local capacity building.

The original intent was to establish a viable conversion pathway for farmers outside Waikato, with Taranaki identified as a key target region due to its dairy infrastructure, farming expertise, and regional support networks. While the foundation for this workstream has been laid—through relationship-building, regional hub planning, and engagement activities—the number of successful farm conversions has been below target at the mid-point.

Several contributing factors are identified, including:

- Capital costs of conversion and limited financial incentives to de-risk the transition
- A degree of uncertainty among prospective farmers about the commercial pathway, profitability, and long-term market security
- The need for more visible, on-the-ground demonstrations of sheep milking success in regional contexts
- Delays in establishing infrastructure to support milk collection, processing, and advisory services at regional scale

The relationship with Parininihi ki Waitōtara (PKW) remains a strategically important part of the Scale Up Programme, particularly in the context of Taranaki development and Māori agribusiness. PKW has actively supported the Taranaki pathway through the establishment of a regional hub and participation in training and extension activities.

While there is strong strategic alignment and long-term agreement on sheep milking as a land use diversification strategy, on-farm conversions have not progressed as originally expected. PKW confirm they will not proceed with farm conversions in the upcoming season, citing capital costs, infrastructure challenges, and a shift in internal investment priorities. Nonetheless, the partnership remains constructive. PKW continues to contribute in-kind support, participate in quarterly reporting, and advocate for clearer planning and more tailored engagement to help reignite momentum. Their current focus is on consolidating operations and re-evaluating long-term opportunities, with continued support for regional capability-building through the hub and training initiatives.

In summary, while the Regional Expansion and Taranaki Development workstream has not yet delivered its intended impact, the programme has laid important groundwork for future uptake. Stronger investment in regional infrastructure, clearer communication of commercial pathways,

and deeper partnership with local stakeholders will be critical to unlocking further conversions and regional scale in the second half of the programme.

Farm Research and Development

At the midpoint of the programme, the Farm R&D workstream has delivered progress in productivity improvement, knowledge sharing, and workforce development. A key feature has been the evolution of the earlier Project Springboard from a collection of trials into a sector-wide R&D platform, contributing to significant yield gains (an average increase of 24 litres per ewe). This required a strategic pivot with a refocusing of investment and extension of the earlier much smaller Springboard project.

The development and dissemination of a "Farming Principles" guide, supported by benchmarking data and best-practice insights, has helped foster consistency in management standards across participating farms.

The cadetship programme has also shown positive results, with good engagement from returning cadets and new entrants. A second iteration of the training model ("Cadetship 2.0") is planned to deepen capability and support succession within the industry. Collaboration across sector partners including Spring Sheep, Maui Milk, and PKW has improved through shared R&D forums, feedback loops, and farmer-led discussion groups. Practical R&D outcomes in areas like milk quality, nutrition, and genetics are being applied on-farm, including the validation of diagnostic tools and feeding strategies.

However, challenges do persist. Adoption of best practices remains inconsistent, with some farmers reluctant to shift away from traditional methods or sceptical of data-driven recommendations. Regional engagement—particularly in Taranaki—has not met expectations, with lower-than-planned cadet and farm participation. Facilitating this workstream will require careful relationship management, especially in the face of economic pressures on farmers. Additionally, while topic-based advisory coordination exists, the absence of a fully formalised national R&D steering group may limit the cohesion and strategic alignment of research efforts.

Overall, the Farm R&D workstream is tracking well against its objectives, having made clear contributions to farm performance, sector learning, and workforce development. The remaining period will require a greater focus on scale, consistency, and strategic coordination to fully realise its potential.

Advanced Dairy Sheep Breeding

The genetics workstream of the Scale Up Programme has made significant progress at the programme's midpoint, laying a strong scientific and operational foundation for long-term productivity gains and industry resilience. Drawing on both programme reporting and stakeholder interviews, it is clear that this workstream is delivering on its core objective: to

develop and distribute high-performing dairy sheep genetics suited to New Zealand farming systems.

A significant success has been the development and refinement of the Zealandia breeding programme, which integrates phenotypic data, performance benchmarking, and selection indices. Reports confirm that genetic gain is already being realised across several commercial flocks, with measurable improvements in milk yield and other performance traits.

Interviewees consistently identified the scientific integrity and strategic clarity of the breeding programme. They highlighted the strength of the nucleus flock, the increasing accuracy of breeding values, and the use of digital tools to support on-farm decision-making. Several pointed to the genetics programme as a cornerstone of the industry's credibility and a key differentiator from international competitors.

Successful advanced breeding trials involving artificial insemination (AI) took place in 2023 showing AI to be a viable technology to support growth. The program has subsequently stepped back from artificial breeding, citing both the effectiveness of the natural breeding programme and lower flock growth than originally anticipated in the business case. With reduced growth the PGG deemed operating both natural and artificial breeding streams unnecessary. This AI workstream was paused, at a defined stop/go point as noted in the Year 2 Annual Review

Reports also noted the expansion in functionality and use of the Dtreo genetics recording system developed by AbacusBio platform to support trait tracking and herd management. Farmers now have access to a growing body of data to inform breeding decisions, though full system uptake remains in progress. Feedback suggests that the next phase should focus on farmer engagement, training, and practical application, ensuring that the benefits of genetic progress are fully realised at farm level.

Finally, early work on emissions-linked traits, such as reduced methane output, has begun, with the potential to align the genetics workstream with broader sustainability objectives in the years ahead. Currently this area has been reduced in priority through strategic reprioritisation driven by the challenging market conditions.

In summary, the genetics workstream is well on track and seen by stakeholders as one of the programme's most technically advanced and strategically valuable components. Continued focus on AI scale-up, system usability, and farmer-facing support will be key to maximising impact in the remainder of the programme.

Programme Governance and Management

At the mid-point of the Scale Up Programme, the performance of both management and governance functions is viewed as a strength of the programme. Interview feedback and programme reporting consistently reflect a high level of programme's leadership, strategic discipline, and agile decision-making.

Governance Performance

The Programme Governance Group (PGG) is seen as functional and effective, providing strategic oversight, constructive challenge, and continuity. Interviewees acknowledged the value of the diverse perspectives around the table including industry, investor, and government voices. This has helped guide key decisions and ensure balance between innovation, agility, and accountability.

The PGG has supported the programme through critical pivots, such as recalibrating timelines in response to SAMR delays, USA re-orientation, managing conversion risk in Taranaki, and reinforcing investment in market-led product development.

MPI representation on the PGG has changed during the programme, with some delay in new representation noted. This is resolved and fully functional now.

As the programme enters its final stages, the PGG could play a stronger role in cross-sector engagement and post-programme transition planning, particularly in linking the programme's legacy to future investment and policy.

Examination of PGG board packs and agendas suggests a strong focus on information updating. This, while essential for governance understanding and context may not be drawing PGG to engage deeply where decisions are required.

Programme Management

Spring Sheep's internal programme team is described by multiple stakeholders as capable, responsive, and deeply invested in the long-term success of the industry. Workstream roles are clear, with strong cross-functional coordination. Spring Sheep has shown an ability to balance commercial imperatives with sector-building objectives, adapting strategy where needed (e.g., pausing rapid regional expansion in favour of product-market readiness).

MPI programme management representative has been consistent through the project, a point noted and valued by programme stakeholders. The Spring Sheep project manager has changed during the project but this has been seamlessly delivered with no negative impact to the programme.

Programme reporting has remained regular and detailed, with evidence of well-managed milestones, risk tracking, and alignment to business case objectives. The team's ability to manage complexity is noted particularly across interdependent workstreams such as genetics, on-farm systems, and market development.

Some noted that the programme could strengthen its external communication, especially around articulating clear commercial pathways for prospective farmers and sharing success stories to build regional momentum.

In conclusion, the programme's management and governance structures are performing strongly and have played a key role in navigating uncertainty, maintaining delivery momentum, and reinforcing strategic focus through a period of significant challenge.

6. Funding

Business case budget for the five year programme to 2027

Funder	$ million
Spring Sheep	$11.77
MPI (SFFF)	$ 8.17
TOTAL budget planned	**$19.94**

Actual budget against planned – to 31/3/25

Total	$ million
Original business case	$11.98
Programme changes[1]	($3.3)
Programme to 31/3/25	$ 8.24
Variation	**$ 0.44**

[1] Two large projects did not progress through programme stop/go points.

Project 3.2 'Advanced Formulation for new markets / FDA approval' did not proceed past a stop/go point due to the documented pivot away from infant formula in the USA to speciality sheep cheeses. Project 4.5 'Regional Milk Pooling/ Transport Efficiency' did not proceed past a stop/go point due to lower than anticipated supply expansion. Collectively these projects plus the paused AI programme reduced the overall programme size by $3.3 million.

As noted elsewhere the programme has maintained discipline while adapting to external conditions, with remaining funds expected to support accelerated delivery and commercialisation in the final programme phase.

7. Risk management

The Scale Up Programme has maintained a formal and regularly updated risk register, which is referenced in multiple quarterly reporting packs. The register outlines key strategic and operational risks, their assessed severity, and associated mitigation strategies, forming a routine part of the programme's governance and performance monitoring framework. The documentation demonstrates active risk management, with the register being reviewed and updated quarterly.

Key risks currently identified include:

- Farmer conversion delays, particularly in Taranaki, impacting scale targets;
- Market risk, including evolving regulatory environments in China and the Middle East and emerging tariffs in the US;

- Timing risk on product launches, with several products still in development or regulatory phases;
- Supply chain and cost pressures, affecting capital infrastructure and input availability; and
- Partner engagement risk, particularly in new export markets where commercial partnerships are still maturing.

There is evidence that risks are being actively monitored and updated, with mitigation strategies in place to support ongoing programme delivery.

8. Unintended Consequences

It is anticipated in public/private funding arrangements that there may be unintended consequences, both positive ('spill-over benefits') and negative. Some that have emerged during the first half of the Scale-Up Programme are outlined below.

On the positive side, despite a very challenging operating environment, the programme has stimulated cautious optimism among some stakeholders, particularly in relation to the potential for greater industry collaboration and sector growth. Growing premium retail market demand in China, and early success in the speciality cheese sector are two examples. These developments suggest that the programme may be building momentum and opening commercial pathways not explicitly targeted in the original business case.

However, a few unintended negative consequences have also been identified. Some industry participants perceive an imbalance in the distribution of funding and research focus, with Spring Sheep viewed as disproportionately benefiting from programme resources. Additionally, the programme's perceived approach to information sharing has raised concern about transparency, with at least one stakeholder/competitor. This potentially challenging the collaborative industry growth intent of the initiative. Lastly, logistical and infrastructure constraints outside the Waikato region may be unintentionally entrenching regional disparities, reducing the feasibility of national-scale expansion in the short term.

9. Conclusions & Recommendations

At the mid-point of the Scale Up Programme, the initiative is broadly on track to achieve its strategic objectives in genetics, product innovation, and global market development. The programme has demonstrated strong capability in navigating regulatory challenges, adapting to market dynamics, and delivering technical milestones. However, slower-than-expected progress in farmer conversion, regional expansion, and the pace of commercialisation due to documented market conditions suggests a need for targeted action in the second half of the

programme and makes it unlikely that the original growth metrics will be realised within the duration of the programme.. The following conclusions and recommendations are offered to support continued momentum and impact:

Focus on Speed-to-Market for New Products

Conclusion:

The programme has successfully delivered two key product readiness milestones: SAMR-compliant infant formula was launched into China in late 2024, and US specialty cheese products have completed commercial trials. Stop/go decisions taken during FY24 and FY25, pausing lower-priority initiatives, have enabled resource reallocation toward these high-impact product launches. These wins represent the opportunity to convert technical work and regulatory investment into near-term commercial opportunity.

Recommendation:

Prioritise the commercial launch of market-ready products (e.g. Chinese infant formula products and sheep cheeses to the US), leveraging regulatory and market access wins to convert technical work into sales.

Rebuild Market Momentum While Activating New Markets

Conclusion:

Reporting confirms that in-market work is yielding positive feedback and commercial leads, suggesting momentum can now be rebuilt with more targeted market activation.

Recommendation:

Build on SAMR registration in China with deeper retail channel activity, while advancing registration and go-to-market plans in USA and Saudi Arabia.

Prepare to Reactivate Farmer Conversion Through Targeted Support

Conclusion:

With milk supply contraction and reduced supplier onboarding in recent seasons, the programme has focused on supplier performance optimisation via Project Springboard. However, as market conditions improve, the need to rebuild supply will return. Preparing to reactivate supply growth to maintain supply demand balance will be important for sector growth and stability.

Recommendation:

Prepare to restart farmer recruitment as demand returns. Offer targeted conversion support including financial modelling, financing options, infrastructure co-investment, and tailored advice. Convert farmer-focused research into practical tools, guides, and training to improve farm performance and build confidence.

Reassess Regional Strategy with PKW and Key Partners

Conclusion:

Regional milk supply growth in Taranaki (and across New Zealand) has slowed due to well documented market conditions. It will be critical to maintain regional awareness, understanding and interest in sheep milking in order to convert this into growth as market demand returns.

Recommendation:

Engagement in Taranaki has slowed, and PKW has deferred on-farm conversion and is reducing flock size. There is a risk that regional momentum will dissipate without a refreshed plan.

Continue Agile Governance and Forward Planning

Conclusion:

The Programme Governance Group has used stop/go points effectively to prioritise projects and manage delivery under changing conditions. As the programme enters its second half, the need to translate preparatory efforts into commercial wins becomes paramount. Consideration of post-programme planning, including succession, ongoing investment, and industry coordination will also be required.

Recommendation:

Focus Programme Governance Group and management to realisation of commercial growth opportunities and support long-term strategy beyond the programme window, including succession planning, post-programme investment, and sector-wide communication and alignment.

10. Appendix

Mid-term review lines of enquiry

The table below describes key lines of enquiry for the Spring Sheep SFFF mid-term review. The following pages outline more detail to support interviews in respective focus areas.

Focus Area	Key enquiries
Programme Governance	Has the Programme Governance Group met regularly and provided effective oversight and strategic direction?
Programme Governance	Are workstream leads delivering against agreed milestones and reporting through the Annual Plan process?
Programme Governance	Have any major risks materialised, and how were they mitigated?
Programme Governance	Are MPI reporting requirements being met, and have any scope or milestone changes been approved?
Programme Enablers	Has Waikato Innovation Park capacity been optimally utilised to support current and future supply?
Programme Enablers	How effective is the PKW partnership in delivering on regional development and Māori employment goals?
Global Market Development	Have two new international markets been validated or entered as planned?
Global Market Development	Is consumer insight research being used to reduce reliance on China and guide diversification?
New Product Development	Have at least two significant product investigations been completed to support expansion?
New Product Development	Are regulatory approvals advancing to enable commercialisation of new sheep milk formats?
Advanced Dairy Sheep Breeding	How many dairy sheep records have been captured? Is yield per ewe and methane reduction improving?
Advanced Dairy Sheep Breeding	Is the nucleus breeding flock operational and distributing elite genetics to suppliers?
National Training and R&D	Is the national training programme launched and certifying dairy sheep workers as planned?
National Training and R&D	How many regional R&D projects have started, and what benefits or insights are emerging?
Taranaki Regional Development	Are two pilot farms operational and producing toward the 750,000 kgMS target?
Taranaki Regional Development	Is the milk pooling and transport solution functioning efficiently and supporting scale?

Key Review Questions for Scale Up Programme

Governance

Governance Structure and Clarity

- Is the Scale Up Programme Governance Group (PGG) functioning effectively with the agreed composition (two MPI reps, two Spring Sheep reps, one independent chair)?
- Are the roles and responsibilities of the PGG, Steering Committees, and Workstream Managers clearly defined and documented?
- Are there any conflicts of interest noted in PGG records, and how are these managed within the governance structure?
- How does the R&D committee interact with the PGG? Is its role and reporting clearly defined and integrated into programme governance?
- Are governance members (PGG) satisfied with their visibility on Intellectual Property (IP) issues and management (e.g., IP register mentioned as "available on request")?

Oversight and Decision-Making

- Are programme decisions being made transparently and at the appropriate governance level (PGG, Steering Committees, or workstream managers)?
- How effectively is the PGG providing strategic oversight to ensure alignment with the agreed outcomes and KPIs?
- How are pivots in programme strategy (e.g., shift from US to Saudi market) approved and managed within the governance structure? Are these decisions timely and effective?
- Have there been any changes to KPIs (e.g., FY24 KPIs removed) and how has this been governed?
- Are decisions and escalations documented, and are there clear protocols for conflict resolution and issue escalation?

Performance Monitoring and Risk Management

- Is the PGG receiving and reviewing regular, accurate, and comprehensive reports on programme performance against KPIs, milestones, and budgets?
- Is the external environment's impact on programme delivery (e.g., reduced industry activity, challenging market conditions) being appropriately considered at the governance level?
- How have budget variances and programme underspends (noted ~20-25% in Y1) been managed? Are these variances considered permanent savings or temporary delays?
- How effectively are risks (such as market shifts, regulatory challenges, or environmental events) being identified, mitigated, and escalated?
- Is the programme's risk register actively maintained and integrated into governance discussions and decision-making?

Stakeholder Engagement and Communication

- Are stakeholders (including MPI, suppliers, regional representatives, and Spring Sheep staff) effectively engaged in governance and decision-making?
- Is communication within governance structures (including reporting from workstreams to PGG) timely, transparent, and action-oriented?
- How well are external communications and public reporting (e.g., quarterly summaries) being managed to reflect progress and challenges?

Compliance and Accountability

- Are governance processes ensuring compliance with the Sustainable Food and Fibre Futures (SFFF) partnership requirements, public funding obligations, and MPI reporting standards?
- Are in-kind contributions being accurately tracked and verified? What governance measures ensure their proper accounting?
- Are interest disclosures, conflicts of interest, and audit trails maintained and updated as part of governance practice?
- How robust are internal financial management and reporting processes in supporting transparent governance oversight?

Resourcing and Capability

- Does the governance group have the necessary mix of skills and expertise to provide effective oversight across programme areas (e.g., genetic development, market development, regional engagement)?
- Are workstream managers adequately supported and resourced to deliver on workstream objectives and escalate issues as needed?
- How is the transition of key personnel (e.g., Joe as Programme Manager, Thomas stepping aside) being managed? Were these changes anticipated, and how smooth was the transition?
- Are governance members provided with the necessary information and training to fulfil their roles effectively?

Global Market Development Workstream

Strategic Progress and Alignment

- How has progress tracked against the specific market development objectives outlined in the business case and annual plans?
- Are there any clear measures of success or KPIs specific to market development, and how are these being reported and evaluated?
- What are the key market development achievements to date? Which targets have been met, and where are there gaps or delays?

- Have specific new target markets been clearly identified and validated through robust insight and feasibility research?
- Is there a clear rationale for market prioritisation (e.g., USA, Middle East) beyond China?
- Is the global market development progressing in a way that supports reducing over-reliance on the Chinese market?
- Are efforts aligned with the overarching goal of positioning New Zealand as a leader in premium sheep milk products?

Market Insights and Consumer Intelligence

- Has the independent research publication or insight channel been established?
- What new insights have been generated on consumer preferences for sheep milk in key regions?
- How have these insights been used to shape product positioning, branding, or marketing strategies?

Market Entry and Activation

- Have two new markets been entered or activated with tangible sales, distribution, or regulatory steps achieved?
- What external factors or market conditions (e.g., tariffs, milk price volatility, competition, cessation of other NZ sheep milk players) have impacted the market development workstream?
- How are these challenges being addressed? Are there any mitigation strategies or new opportunities being explored?
- Have product sales commenced in any new global market as planned?
- Are current sales or pipeline projections aligned with the growth targets needed to justify upstream investment?

Reputation and Market Influence

- How is New Zealand sheep milk now perceived in target export markets compared to project inception?
- Has any content or communication been released to build the category or highlight New Zealand provenance?
- How are other industry players benefitting from the global market insights being generated?
- Is there evidence of coordinated messaging or shared branding benefits across the sector?

Programme Impact and Future Outlook

- How does the market development workstream contribute to the programme's overall growth in sheep numbers, milk yield, and regional diversification?
- Are there updated forecasts or projections for market development outcomes, particularly in light of the evolving external environment?

- What further steps are needed to sustain or expand market development over the remainder of the programme and beyond?

Integration with Broader Programme

- How well is the market development workstream integrated with other workstreams (e.g., low methane genetics, product innovation)?
- Are there any cross-workstream dependencies or risks that could impact market development success?

New Product Development Workstream

Product Innovation and Formulation

- Have at least two significant product investigations or trials been completed?
- Are there emerging formulations or product formats that address unmet consumer needs or create a competitive advantage?
- What new understanding has been gained about the functional components of NZ sheep milk (e.g. fat, bioactives, digestibility)?
- How is this knowledge influencing product development pipelines or claims?
- What progress has been made in developing advanced sheep milk product formats (e.g. nutritional powders, medical nutrition, ready-to-drink)?
- Are these formats suitable for scaling and aligned with identified market trends?

Regulatory and Market Readiness

- Are new formulations progressing through required regulatory pathways in key target markets?
- Have any new markets been unlocked as a direct result of product development efforts?
- Are any of the newly developed product formats aimed at reducing dependency on China by opening or supporting entry into other markets?

Commercialisation and Impact

- Have any new products moved beyond R&D and into commercial pilot or market trial phases?
- Is there a clearly defined pipeline for product launch, including supply chain and processing capabilities?
- Are the new product formats expected to increase the economic value per kg of sheep milk?
- How are these products positioned to improve supplier returns or reduce production risk?

Collaboration and Industry Benefit

- How is knowledge from product investigations being shared with the broader sector?

- Are there opportunities for co-investment or joint ventures with other sheep milk industry players?
- How effectively is Spring Sheep leveraging external expertise, partnerships, and research connections (e.g., collaborations with AgR, B+LNZ, commercial parties)?
- Are there clear linkages between NPD work and industry-level research and development (e.g., low methane genetics, feed development, production systems)?
- How are regional and international partnerships contributing to NPD efforts?

Integration and Impact

- How well is the NPD workstream integrated with other workstreams (e.g., market development, genetics, farm systems)?
- Are there any cross-workstream dependencies or risks that could affect NPD success?
- What role is NPD playing in supporting the programme's long-term goals (e.g., market differentiation, increased milk yield and value, industry sustainability)?

Future Outlook

- What are the key focus areas for NPD over the next phase of the programme? Are resources and governance support aligned to these?
- How will NPD outcomes contribute to the broader Spring Sheep and industry-level market positioning?

Advanced Dairy Sheep Breeding Workstream

Genetic Data Infrastructure and Quality

- How many dairy sheep records have been captured in the flock recording platform to date (target: 10M+ by programme end)?
- Is the data quality sufficient to support reliable breeding value estimates?
- Are participating farmers regularly contributing data and using insights from the genetic system?
- Has the "Genetics Tech Stack" been fully implemented and adopted by suppliers?
- Are advanced breeding values (e.g. milkability, methane traits) being generated and made accessible?

Genetic Progress and Breeding Strategy

- Is there measurable genetic gain in milk yield per ewe, particularly within the elite flock (target: >10%)?
- Are genetic improvements translating to improved on-farm productivity or profitability?
- What progress has been made on breeding for low methane emissions?
- Have low methane rams or sire lines been made available for lease or distribution?

- Are alternative reproductive technologies (e.g. less invasive AI) being trialled and adopted?
- What barriers (cost, access, success rate) are limiting broader uptake?

Industry Benefit and Accessibility

- How are the breeding programme outputs contributing to the programme's broader goals of improving sheep milk production, yield, and sustainability?
- How do the breeding efforts link to market development and product differentiation (e.g., milk quality attributes, sustainability claims)?
- Are regional breeding hubs or partnerships being developed effectively, particularly in key regions (Taranaki, Canterbury, Southland)?
- Is the nucleus breeding flock contributing to wider industry access to elite genetics?
- Are mechanisms in place to ensure genetic diversity and avoid inbreeding risks?
- Are new breeding tools and strategies being shared beyond Spring Sheep to other dairy sheep operators?
- What plans are in place to ensure widespread sector benefit from the genetic platform?

Future Focus

- What are the next steps and priorities for the ADSB workstream in the remainder of the programme?
- How is the governance group ensuring that resources and strategic focus remain aligned to breeding objectives?

National Training and Research & Development Workstream

Training Programme Implementation

- Has the sheep dairy training programme been launched as planned?
- How many trainees have completed certification to date (target: 25+)?
- Is the training content aligned with industry needs, including animal welfare, milk quality, and environmental management?
- What feedback has been received from participants and employers on the value and relevance of the training?
- How has the Sheep Dairy Farming Principles document (prepared during this programme) been used to support national training efforts? Is it actively contributing to broader industry capacity building?

Workforce Development and Career Pathways

- Is there evidence of the training programme contributing to workforce mobility or regional capability growth?

- Are graduates from the programme being employed across different regions, including Taranaki and the South Island?
- Has the programme supported diversity or Māori participation in the workforce as intended?

Regional R&D Programme Delivery

- How many on-farm R&D projects have been initiated to date (target: 30+ by programme end)?
- What are some early findings or practical benefits emerging from these regional R&D projects?
- Is the National R&D Steering Committee operating effectively and equitably across regions?

Knowledge Transfer and Collaboration

- How are R&D outcomes being shared with industry participants, especially in emerging regions?
- Are farmers engaged in co-design or feedback loops to guide research priorities?
- Are there mechanisms to ensure regional learnings are contributing to national performance gains?
- How effectively is the programme leveraging partnerships with research institutions and industry bodies (e.g., AgR, B+LNZ, commercial partners) for R&D activities?
- Is there evidence of collaborative R&D projects with industry partners or regional players that contribute to the programme's goals?
- How is knowledge generated through R&D being shared with farmers, regional stakeholders, and the broader industry?
- Are there clear channels for feedback from farmers and practitioners to inform ongoing R&D and training efforts?

Integration with Broader Programme and Market

- How well is the national training and R&D workstream integrated with other workstreams (e.g., breeding, NPD, market development)?
- Are regional-specific projects or R&D hubs being supported, particularly in key areas such as Taranaki, Canterbury, and Southland?
- How does the training and R&D effort align with commercial priorities and future market development opportunities?

Challenges and Future Outlook

- What are the main challenges or barriers faced by the national training and R&D workstream (e.g., limited adoption, funding constraints, changing market conditions)?

- How is the programme adapting its R&D focus in response to external pressures, such as the closure of Maui Milk and Sheep Milk NZ?
- What next steps are planned for national training and R&D, and how will these contribute to the long-term sustainability and growth of the industry?

Taranaki Regional Development Workstream

Pilot Farm and Hub Establishment

- How well is progress tracking against the Taranaki-specific objectives outlined in the programme's business case and annual plans?
- Are the two pilot farms in Taranaki operational and progressing toward milk production targets (e.g. 750,000 kgMS)?
- Has the Taranaki Training Hub or Centre of Excellence been established and is it functional?
- Is the demonstration farm being effectively used for training, R&D, and stakeholder engagement?

Milk Pooling and Transport Logistics

- Is the regional milk pooling and transport solution operational?
- Are logistics functioning efficiently and cost-effectively between Taranaki and Waikato Innovation Park?
- Have there been any issues in milk quality, timing, or compliance with MPI transport regulations?

Regional Engagement and Stakeholder Support

- Is PKW actively involved in workstream governance (e.g. Steering Committee participation)?
- Are local stakeholders (e.g. farmers, iwi, training partners) engaged and contributing to programme success?
- Is the regional rollout aligned with Taranaki's social, cultural, and economic development goals?

Social, Economic, and Environmental Impact

- What early employment, training, or business development outcomes are evident in the region?
- Is the land use change from bovine to ovine showing measurable environmental benefits (e.g. nitrate reduction)?
- How are kaitiakitanga principles and Māori agribusiness values being embedded in development activities?