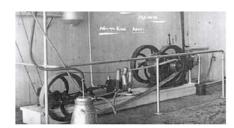


The First 110 years of the Dairy Industry¹





NZDRI

NZ Agricultural College

NZ Dairy Board

First milk powder produced

First milking machines

Land Wars 1860

Treaty of Waitangi 1840

Anchor Butter Factory, Waikato

Declaration of Independence 1835

First Cooperative, Otago

First ships to Sydney

Introduction of Shorthorns





1814

1845

1871

1886

1890

1904

1923

1926

1927

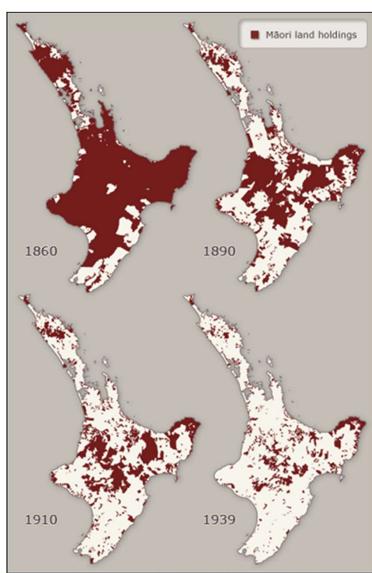
The country's first co-operative dairy factory was established at John Mathieson's 'Springfield' farm on the Otago Peninsula in 1871. The Otago Peninsula Co-operative Cheese Factory Co. Ltd began producing Scottish- style 'Dunlop' cheese in September that year, the first manager being J.L. McGregor.

¹ https://www.dairybarnsystems.co.nz/knowledge-centre/a-timeline-of-dairy-in-nz/

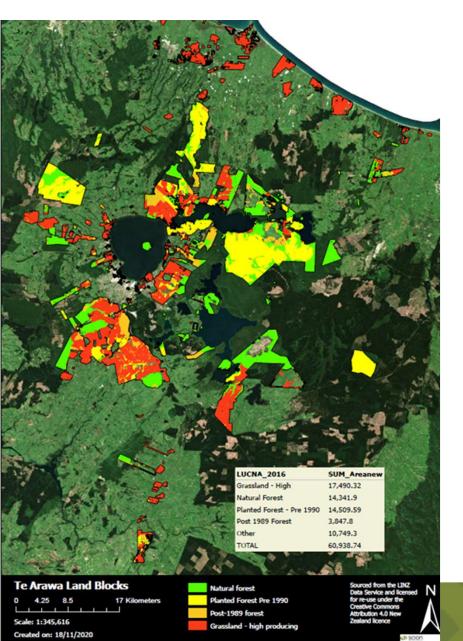
Deforestation of New Zealand² And the loss of Maori land³



² Deforestation Maps: https://envirohistorynz.com/2009/11/21/237/ and https://teara.govt.nz/en/interactive/11674/deforestation-of-new-zealand see also Paul, T., Kimberley, M.O. & Beets, P.N. Natural forests in New Zealand – a large terrestrial carbon pool in a national state of equilibrium. *For. Ecosyst.* 8, 34 (2021). https://doi.org/10.1186/s40663-021-00312-0



³ Māori land loss, 1860-2000', URL: https://nzhistory.govt.nz/media/interactive/maori-land-1860-2000 (Ministry for Culture and Heritage), updated 21-Apr-202. The majority of the SI was confiscated between 1840 and 1864



Ownership Structures - large number of small blocks fragmented land titles; a small number of large entities that control the majority of land

Key Facts – Blocks and Area

- 10 blocks are over 1,000 Ha comprising 31,671 (49%) of total land area in Te Arawa
- 47 blocks (2.3%) make up 45,447 Ha (71%) of total land area in Te Arawa
- 1,549 blocks are less than 5 Ha in size

Pohewa Pae Tawhiti (Visualising Horizons)

Guided Process for Decision Making

STRUCTURE OF MATATAU WHENUA FRAMEWORK:

Matatau Whenua

(Knowledge of the Land)



ArcGIS

Systems

and land use

decisions

Horticulture

and tree

crop models

FARM

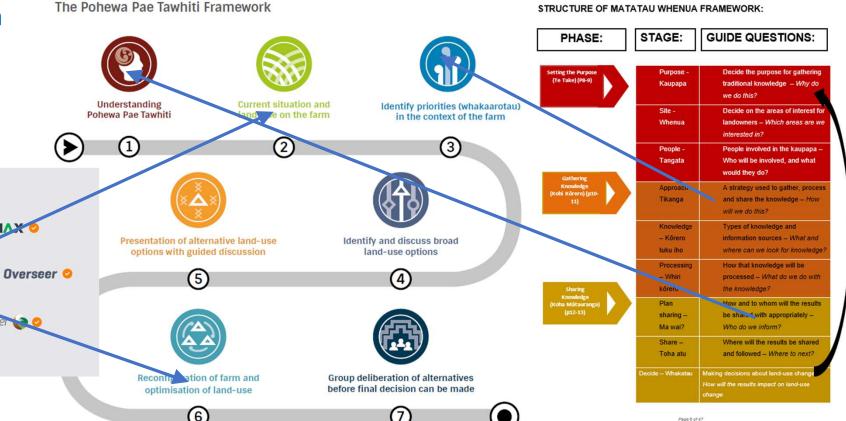
forecaster

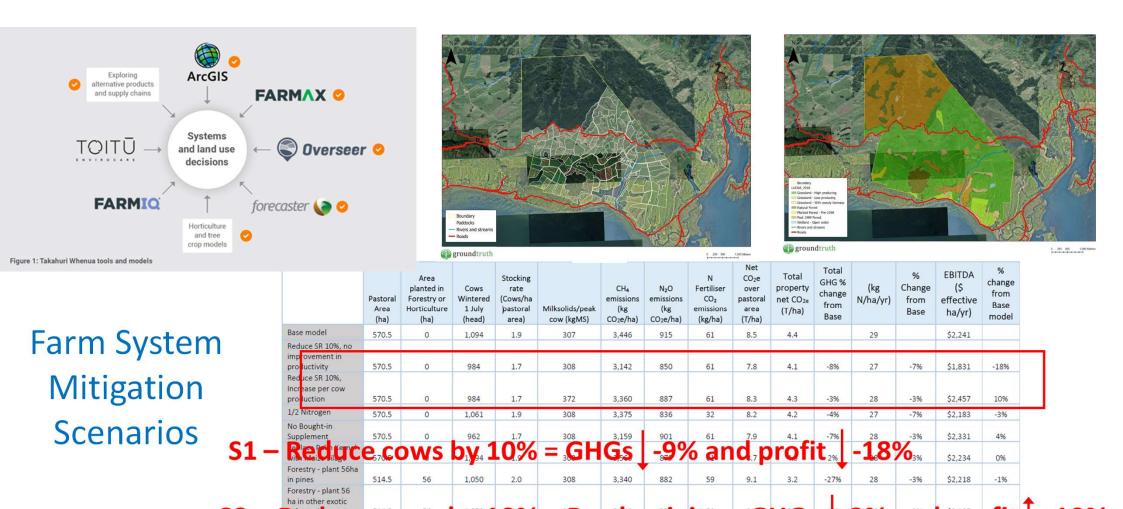
alternative products and supply chains

FARMIQ

TOITŪ

Figure 1: Takahuri Whenua tools and models





1.072

1,072

1.9

3,378

3,378

905

8.5

8.5

4.3

-2%

29

0%

\$2,282

\$2,128

2%

10

Horticulture - 10 ha Chestnuts

Arable - 10ha Oats

560.5

Guided Process for Decision Making

The Pohewa Pae Tawhiti Framework

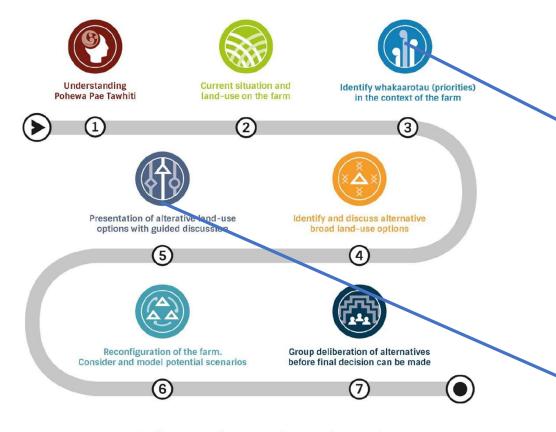


Figure 1: Pohewa Pae Tawhiti Framework to assist decision making

	Group Weighting
Tōnuitanga (prosperity)	25.7%
Whakatipuranga (growing generations)	22.9%
Tiakitanga (guardianship)	26.3%
Taituarātanga (support)	25.2%

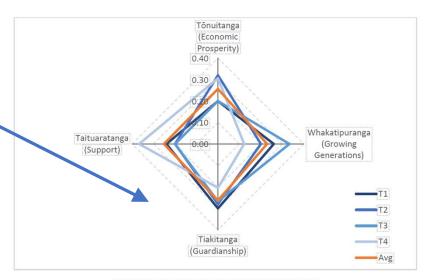
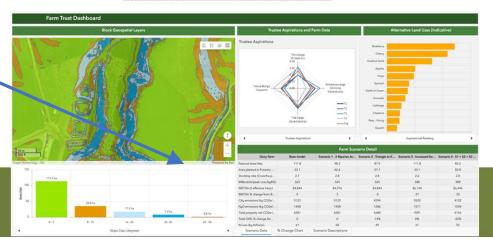
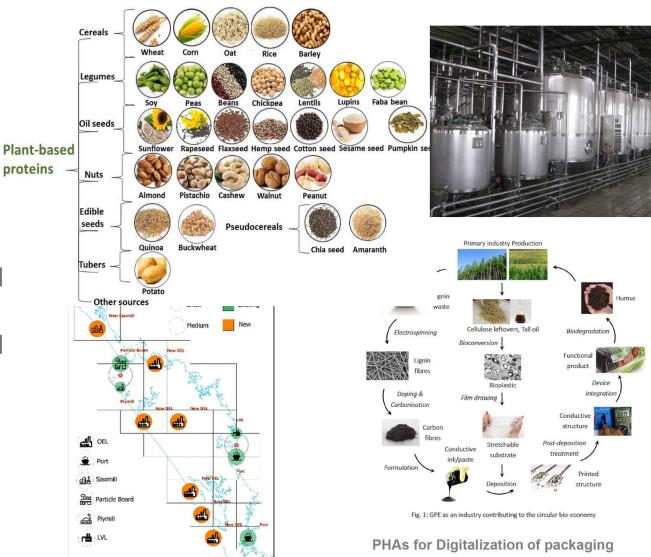


Figure 6: Whakaarotau Choice Model weightings



Where do alternative proteins, precision fermentation, low emission dairy etc. fit?

- Market channel development and in-market partners are critical
- Lack of alternative processing and supply chain infrastructure
- High risks for individual farmers
- Collective approaches are critical to reduce and manage risk



Collective Supply Networks

- Exploring supply network options across collectives and across catchment and district boundaries
- Lowers risk profile for individual farms
- Investment needed into processing and market infrastructure
- Needs to be farmer/grower driven

