



MINISTRY OF AGRICULTURE AND FORESTRY

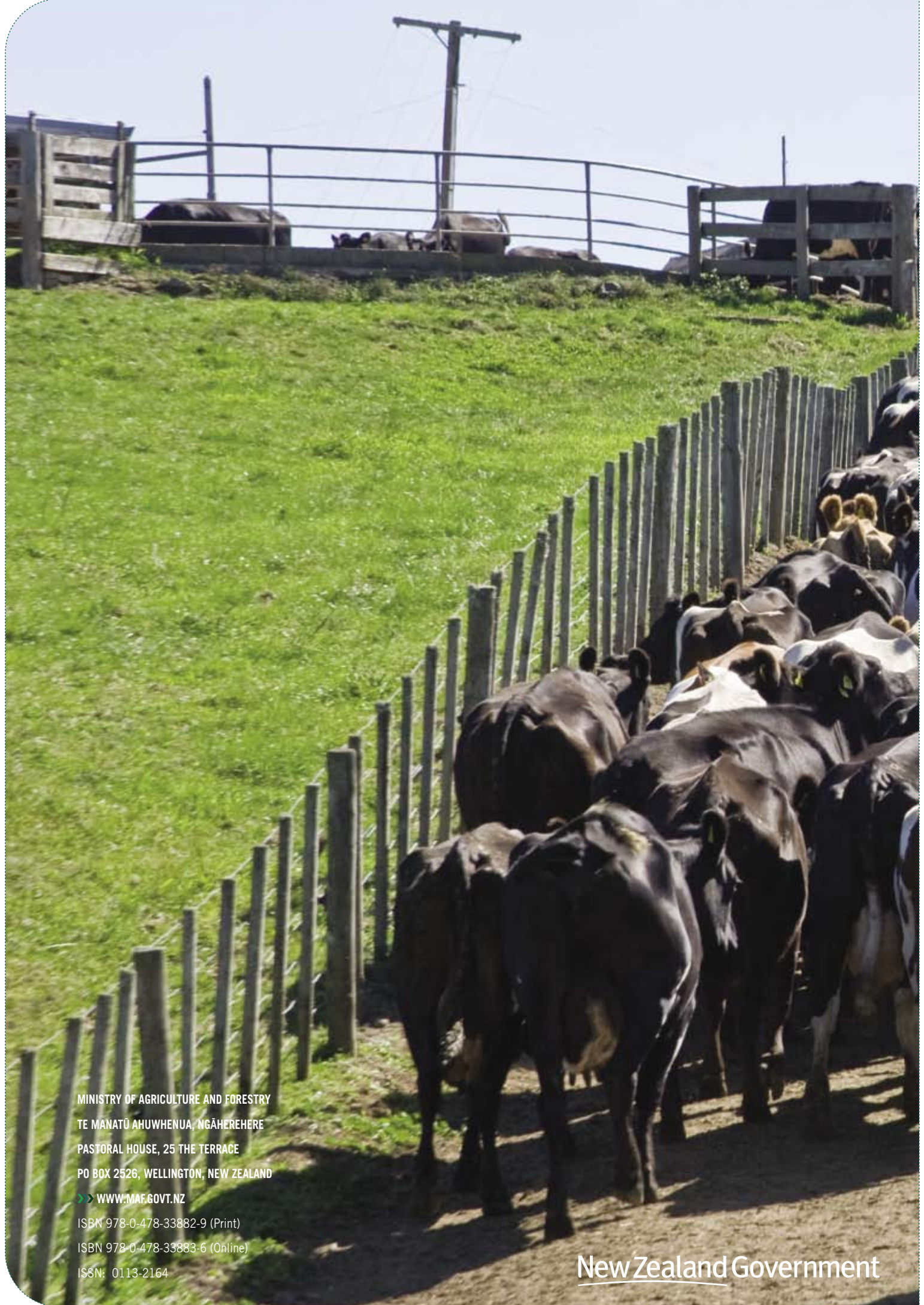
# SITUATION AND OUTLOOK FOR NEW ZEALAND AGRICULTURE AND FORESTRY

JULY 2009



Ministry of Agriculture and Forestry  
Te Manatū Ahuwhenua, Ngāherehere

MAF POLICY



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# FOREWORD

*“These sectors are the backbone of our economy and will play a key part in what is likely to be an export-led economic recovery.”*

Welcome to *Situation and Outlook for New Zealand Agriculture and Forestry (SONZAF)* for 2009.

*SONZAF* is an annual publication that looks at the issues facing the primary sectors, reports on the sectors’ performance over the previous year, and forecasts the trends for individual sectors over the next five years.

The global economic crisis that became apparent from late 2008 is unprecedented. While it has compounded the many challenges already faced by New Zealand’s primary producers, the medium-term outlook for the food-based agriculture sectors remains solid. These sectors are the backbone of our economy and will play a key part in what is likely to be an export-led economic recovery.

As the Government’s principal adviser on primary sector issues, MAF has a role working with the sectors to look at strategic issues – and *SONZAF* is one of the ways we do this.

In the issues chapters, we feature a meat sector study that looks at possible future scenarios for the meat industry over the next 10 to 15 years; a Marlborough dryland farm’s approach to dealing with the challenges of a changing climate; and research challenging the extent of the so-called “rural–urban divide”.

As well as presenting MAF’s outlook expectations to stakeholders, I hope that *SONZAF* will increase understanding of the challenges, issues, risks and opportunities that influence the performance of the primary sectors, and encourage informed debate about the sectors’ future.

MAF is committed to leading the development of policy that will see New Zealand’s primary sectors reach their full potential and make the best possible contribution to the well-being of New Zealanders.

I recommend *SONZAF* to anyone who has an interest in the primary sectors and the opportunities and challenges ahead.

Paul Stocks  
Deputy Director-General  
MAF Policy

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