



EVENT BRIEFING

Meeting with representative from United States Department of Agriculture, 25 June 2025

To	Hon James Meager Minister for the South Island		
Date:	25 June 2025	Time:	3.30pm-4.00pm
Location:	Your office, Parliament	Priority:	Medium
Security classification:	In Confidence	Tracking number:	BRIEFING-REQ-0016278

Contact for telephone discussion (if required)

Name	Position	Telephone	1st contact
Karl Woodhead	General Manager Strategy, Planning and Performance, Kānoa – Regional Economic Development & Investment Unit (Kānoa)	Privacy of natural persons	
Cory Hagenaars	South Island Lead Advisor, Kānoa	Privacy of natural persons	✓

The following departments/agencies have been consulted and provided input

Ministry of Foreign Affairs and Trade and Ministry of Primary Industries

Recommendations

The Ministry of Business, Innovation and Employment (MBIE) recommend you:

- a **Note** the information in this briefing to support your meeting with the Agriculture Counsellor from United States Department of Agriculture on 25 June 2025.

Noted

Karl Woodhead

General Manager Strategy, Planning and Performance

Kānoa – Regional Economic Development & Investment Unit, MBIE

24 / 06 / 2025

Hon James Meager

Minister for the South Island

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Background

1. You will meet with Lazaro Sandoval, Chief Executive and Agriculture Counsellor from the United States Department of Agriculture, on Tuesday, 25 June 2025, from 3.30 p.m. to 4.00pm in your office. Also in attendance will be:
 - a. Robere Hall, Agriculture Specialist at the United States Department of Agriculture / Foreign Agricultural Service
 - b. Juma Kepher, Agricultural Assistant at the U.S. Embassy Canberra.Biographies of the attendees are attached at **Annex One**.
2. This is an introductory meeting where you will discuss the agriculture industry in the South Island, including the region's sheep and beef farmers. Lazaro's next visit to New Zealand at unknown date planned for the South Island, where he intends to meet with sheep and beef farmers and red meat processors.
3. If Lazzaro has not yet arranged meetings with sheep and beef farmers or red meat processors, this could be a good opportunity for you to suggest potential contacts as a follow-up after the meeting.
4. This meeting aligns with your strategic priorities of doubling South Island exports and increasing its contribution to GDP. It also supports the Government's "Going for Growth" agenda, particularly under the pillar of Promoting Global Trade and Investment and the sub-pillar of supporting exporters to grow their offshore markets, creating more jobs and opportunities.
5. The meeting contributes to these goals by strengthening ties with the United States Department of Agriculture, promoting the South Island's sheep and beef sectors, and exploring export and collaboration opportunities with the U.S. market.

Overview of New Zealand's Agriculture Sector

6. The New Zealand farming system is characterised by extensive use of pasture-based, grass-fed systems, particularly for dairy and sheep farming. New Zealand's temperate climate and abundant rain fall make the ideal conditions for pasture-based farming.
7. The agriculture sector includes the dairy, meat and wool, horticulture and arable sectors.
 - The forecasted revenue of the agricultural sector in 2025 is NZD \$39.02 billion¹.
 - As of March 2023, the agricultural sector was estimated to have contributed NZD \$13.25 billion to New Zealand GDP, out of a total GDP of NZD \$393.52 billion, representing approximately 3.4 per cent.
8. Additional relevant statistics are attached in **Annex Two**.

Overview of South Island Agriculture Sector

9. The South Islands agricultural sector is a significant contributor to the New Zealand's overall agriculture sector.
10. As of March 2023, the agricultural sector was estimated to have contributed NZD \$5.57 billion to the South Island's GDP, out of a total GDP of NZD \$88.21 billion.
 - Agricultural sector in the South Island represents approximately 6.3 per cent².

¹ Sourced from [Situation and Outlook for Primary Industries \(SOPI\) June 2025](#)

² Sourced from [farm-facts-2023.pdf](#)

11. There are more sheep and fewer beef and dairy cattle in the South Island.
- As of June 2022, there were 12,822,000 sheep in the South Island, making up 50.98 per cent of New Zealand's total flock³.
 - In the same period, there were 1,162,000 beef cattle and 2,401,000 dairy cattle, accounting for 30.24 and 40.58 per cent respectively of the country's total herd.

Sheep and Beef farming and the Red Meat sector

12. Sheep and beef farming are significant industries for New Zealand and are the second and third largest industries in the agricultural sector.
13. Additional relevant statistics are attached in **Annex Two**.
14. You were recently provided details on the red meat sector (briefing REQ-0011621 refers).
15. The South Island has 20 meat processing plants, most of which are in the regions which supports employment in these communities. These include Silver Fern Farm in Belfast, Alliance Group in Pukeuri and Bowmon Meats in Waimate.

New Zealand and United States Trade relationship

16. The United States is an essential partner for New Zealand. It's our third largest two-way trading partner and a major source of foreign direct investment.
17. Should the topic of New Zealand and United States Trade relationship be raised, we have worked with the Ministry of Primary Industries and Ministry of Foreign Affairs and Trade to provide some back pocket talking points. These are attached as **Annex Three**.

Annexes

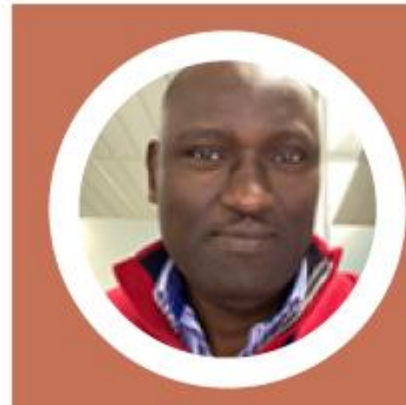
Annex One: Biographies of attendees

Annex Two: Relevant statistics for the overall New Zealand Agriculture Sector and Sheep and Beef Farming

Annex Three: Back pocket talking points New Zealand and United States Trade relationship

³ Sourced from [farm-facts-2023.pdf](#)

Annex One: Biographies of attendees

	Lazaro Sandoval, Agricultural Counselor, Foreign Agricultural Service, United States Department of Agriculture Lazaro currently serves as the Agricultural Counselor at the U.S. Mission in Canberra, Australia, with responsibilities that also extend to the Foreign Agricultural Service in New Zealand. Prior to this role, Lazaro held several diplomatic postings, most recently as Senior Agricultural Attaché at the U.S. Mission to the European Union in Brussels, Belgium. He previously served at the U.S. Consulate General in Mumbai, India from 2019 to 2022, and at the U.S. Embassy in Buenos Aires, Argentina from 2015 to 2019. Lazaro joined the U.S. Department of Agriculture's Foreign Agricultural Service in October 2010. He began his career in the Office of Global Analysis as an economist, where he focused on global livestock and poultry markets and trade. He later worked in the Office of Agreements and Scientific Affairs, conducting analysis in support of WTO Doha Round negotiations in collaboration with the Office of the U.S. Trade Representative.
	Robere Hall, Agriculture Specialist US Department of Agriculture/ Foreign Agricultural Service Robere (Roo) worked at Cargill in Toronto, Canada as a Crop Input and Sales Representative. Then he returned to New Zealand to Landcorp Farming Ltd, first as the farm innovation specialist then as the South Island Regional Business Manager. Whilst at Landcorp Roo lead various innovation projects such as: Deer Milking, Virtual fencing, Fertigation and Regenerative Agriculture. Reporting to the Agricultural Councillor in Canberra since May 2022, Roo is currently the sole representative of FAS in New Zealand.
	Juma Kepher – Agricultural Assistant, U.S. Embassy Canberra Juma is the Agricultural Assistant at the U.S. Embassy in Canberra, Australia. He began working at the Foreign Agriculture Service of the United States Department of Agriculture (FAS/USDA) in June 2023. His duties in this role facilitate successful office operations and supporting the FAS team based in Canberra and Wellington in execution of USDA's mission objectives. Prior to his role, Juma worked in intensive agricultural systems as a poultry farm manager and as a Certification Coordinator for a Farm Animal Welfare agency.

Annex Two: Key statistics for the overall New Zealand Agriculture Sector and Sheep and Beef Farming

Overview of New Zealand's Agriculture Sector

The food and fibre sector (including processing):

- Forecast to reach \$59.9 billion by 30 June 2025⁴.
- As of 10 March 2023, was 10.0 per cent of New Zealand's Gross Domestic Product (GDP).
- As of 10 March 2025, was 82.5 per cent of goods exports
- As of 10 March 2023, 12.4 per cent of national employment, employing approximately 360,000 people.
- An estimated 85-90 per cent of New Zealand agriculture is exported⁵.

Export revenue from the food and fibre sector from 30 June 2025 is expected to show significant overall growth. The food and fibre sector's revenue is projected to rise by 12 per cent, reaching \$59.9 billion⁶. A breakdown of the industries shows:

- Dairy export revenue is expected to increase by 16 per cent to \$27.0 billion.
- Meat and wool export revenue is forecast to increase by 8 per cent to \$12.3 billion.
- Horticulture export revenue is forecast to increase by 19 per cent to \$8.50 billion
- Arable grains export revenue is forecast to drop 1 per cent to \$340 million.

Sheep and Beef farming

Sheep and beef farming are the second and third largest industries in the agricultural sector. In 2025, it is forecasted that:

- Beef will contribute \$3.59 billion in revenue
- Sheep meat will contribute \$2.88 billion in revenue.

As of 2022, 90 per cent of beef and 95 per cent of sheep meat was exported⁷.

⁴ Sourced from [Situation and Outlook for Primary Industries | NZ Government](#)

⁵ Sourced from [New Zealand - Agricultural Sector | Privacy Shield](#)

⁶ Sourced from [Situation and Outlook for Primary Industries | NZ Government](#)

⁷ Sourced from [Trade Policy | Beef + Lamb New Zealand](#)

Annex Three: Back pocket talking points New Zealand and United States Trade relationship

The Ministry for Primary Industries and the United States Department of Agriculture (USDA) have a productive, long standing working relationship. Services that fall under USDAs remit that MPI works with are Animal Plant Health and Inspection Service (APHIS) and the Food Safety Inspection Service (FSIS).

USDA FSIS auditors visited New Zealand earlier this year to assess our red meat production system. Regular audits are an ongoing requirement for New Zealand to be able to export red meat (bovine and ovine) for human consumption to the US. Confidential advice to Government

Trade relationship

New Zealand and the US both enjoy good two-way trade in agricultural products. This is a result of long-standing relationship between our respective technical agencies that have continued to work hard to deliver on each other's priorities.

The US is New Zealand's second largest export market, our third largest two-way trading partner and source of inbound investment. It has consistently been among our top three trading partners since the 1980s. New Zealand's agricultural and horticultural exports are strong export earners, with the US an important market for New Zealand red meat, dairy, wine, wood, fish, and fruit.

Any discussion around specifics to do with imports and exports of agricultural goods should be referred to the Minister for Biosecurity and Minister for Agriculture to comment on this further.

[In Confidence] For context, in the year ending March 2025, New Zealand exported NZD \$5.78 billion to the United States and imported NZD \$0.64 billion of agricultural goods from the United States.

Commercial Information

International relations, Negotiations

International relations, Negotiations

On the impacts of tariffs

If the topic of tariffs is raised, you should defer to the Minister of Foreign Affairs and Minister for Trade to comment on this further.

New Zealand's Minister for Trade and Investment has made clear our opposition to the additional tariffs New Zealand businesses face entering the US market.

Talking to businesses across the South Island, they also worry about the secondary impacts of US trade policy on supply chains – including shipping and the length of customs clearance procedures.