

View from the Cowshed

2025



Dairynz 



Foreword

from Campbell Parker, DairyNZ chief executive



Farmers play a pivotal role in our country and communities, helping to power New Zealand's economy every day.

Dairy is New Zealand's largest export earner, generating about \$25 billion each year—which is approximately a quarter of the total value of our exports.

About 50,000 people are directly working in the sector.

We are pleased to be able to share some of their views with all of New Zealand. What always comes through strongly is the commitment, passion, and spirit of innovation, which have driven our success as a sector to date and which continue to underpin the plan for the future.

Farming is changing—rapidly. Evolving consumer expectations, shifting global trade dynamics, and fast-moving technological advancements are transforming the landscape.

To help farmers meet these challenges, DairyNZ is investing in critical areas to support profitability and sustainability such as animal care, pasture resilience, animal genetic gain, water quality, and robust biosecurity. These priorities are key to ensuring the long-term environmental, economic, and social resilience of dairy farming in New Zealand for generations to come. These are clearly the right areas of focus, as we read through this survey.

We know that regulatory certainty remains a significant concern for dairy farmers – and has been highlighted again in this report. We hear

those concerns. That's why we're actively working across the sector and with local and central governments to advocate for practical, enduring, evidence-based solutions that work for farmers.

Other key points in the survey show us that there is positivity, excitement and progression within the sector, that farmers want others to know dairy is a great place to work.

That they have animal welfare and environmental sustainability front of mind.

And they're focused on the big picture – market and global consumer expectations.

Pasture and animal productivity is important, as is ensuring farm workers have good work life balance, and that emerging technology uptake is on the uptick.

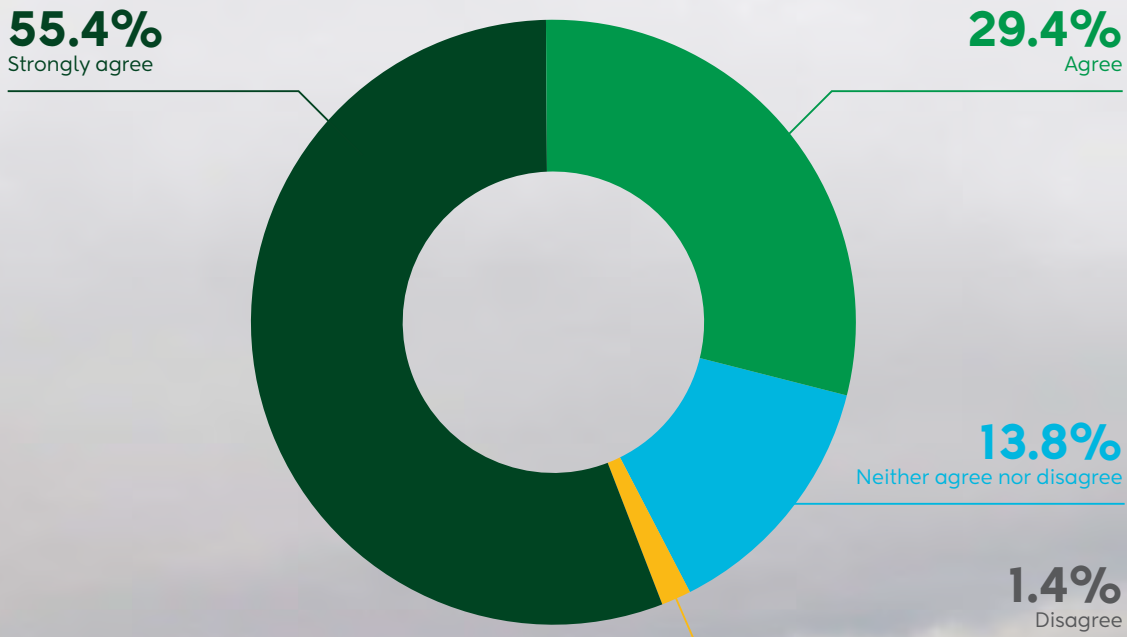
As we navigate these complex challenges, collaboration and forward planning will be more important than ever. DairyNZ is committed to working alongside farmers and industry partners to tackle these issues head-on and co-create a thriving future for New Zealand dairying.

There is a lot to balance. But with the right science, support, and relationships—grounded in evidence and trust—we believe the future is bright for the sector, for farmers, for rural communities, and for all New Zealanders who benefit from their hard work.

Pride in the sector

We asked farmers to tell us about the level of pride they feel in the dairy sector, with the results indicating a strong sense of pride among those working in dairy. An overwhelming majority (84.8%) felt proud to be a part of this sector, with very few disagreeing with the statement.

**Please rate how strongly you agree or disagree with this statement:
I feel proud to work in the dairy sector.**

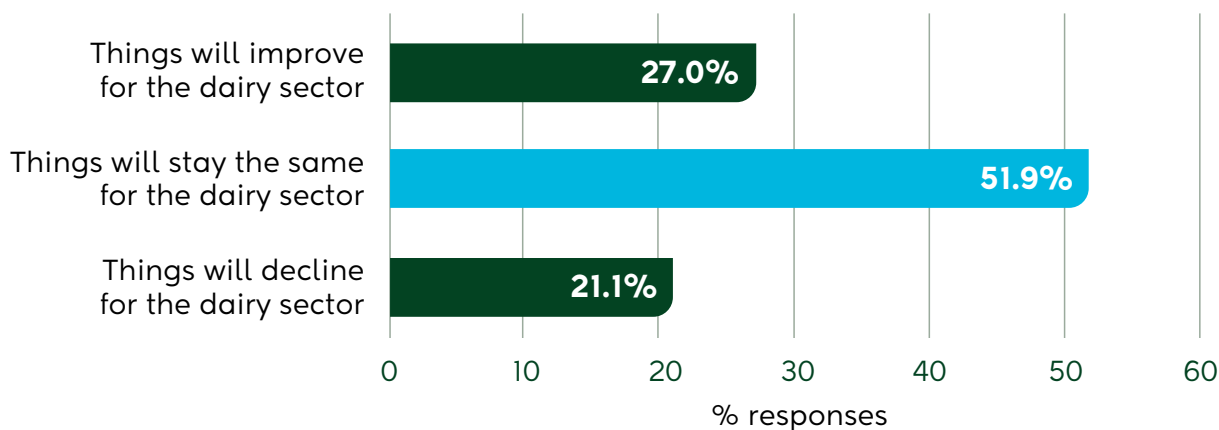


*“I wish they could see the daily commitment, the innovation, the education we’re driving forward, and how much **pride** we take in doing things right – not just for today, but for the future generations.”*

Sector outlook

A majority of farmers indicated they feel the outlook will remain positive for the sector over the next three years, with less farmers feeling that things will decline (21.1%) than those who feel it will stay the same (51.8%) or improve (27.0%).

How do you expect the outlook for the dairy sector to change over the next three years?



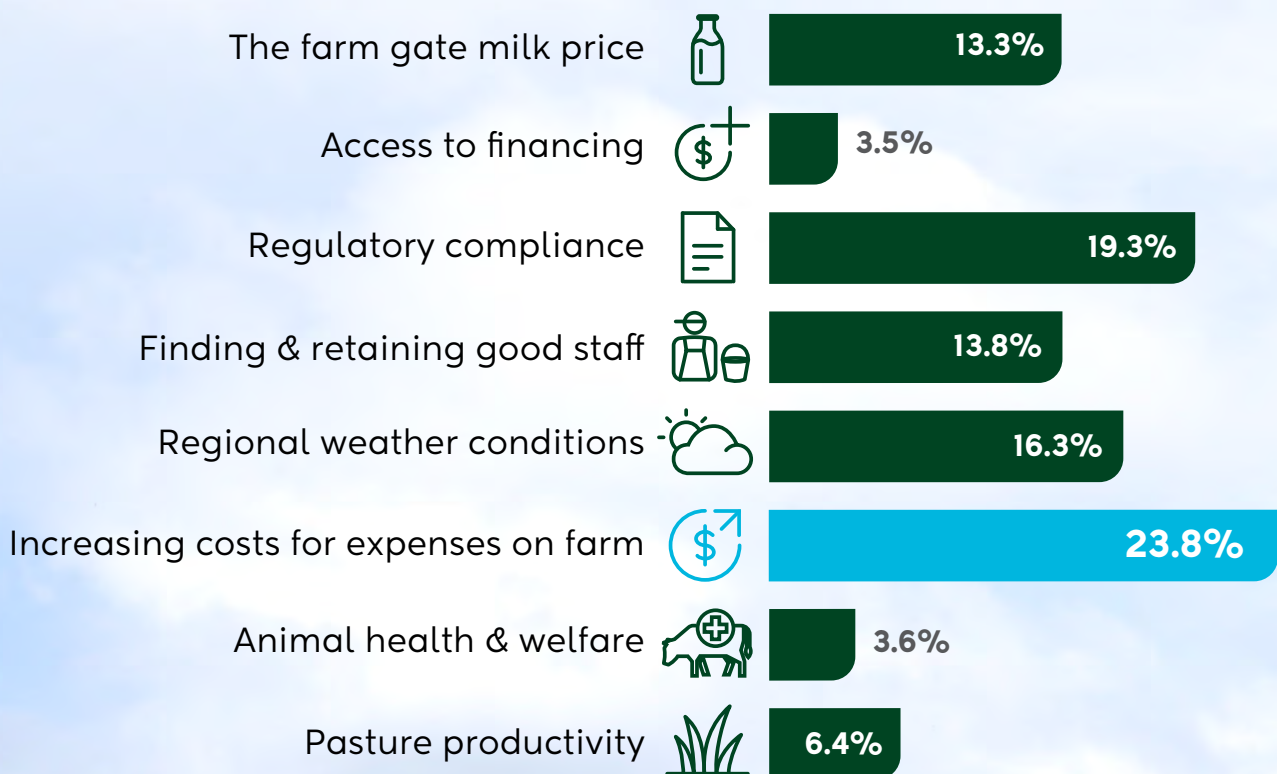
“We are all trying our best to look after our planet and the next generation of farmers.”*

*Throughout this report you will find quotes from respondents expressing their views in their own words.

Top farm matters

When asked about what issues were impacting farmers' individual farms, the key concerns were the increasing costs of farm expenses like feed and fertiliser, with regulatory compliance and regional weather conditions also high on the list.

What were the top matters impacting the individual farm you are a part of in the last 12 months? Select up to 3.



“We have high costs, and the dairy payout isn’t just money in the bank to spend.”

Top sector matters

When considering the top matters for the dairy sector overall, farmers noted long term regulatory certainty as the most important (24.0%). This was followed by consumer and market expectations and farm and pasture productivity.

What are the top matters you believe are most important to the dairy sector overall? Select up to 3.



“The regulations, rules and procedures farmers comply with, and steps taken to protect our land and animals.”



One thing about the sector

Our farmers would like those not working in the dairy sector to understand they care deeply about their animals and their welfare while also wanting to protect the natural environment. The key themes of the responses are reflected below.

What's one thing you wish people who are not a part of the dairy sector knew about our sector?



Hard work:

Respondents often discussed the demanding nature of their work. Recurring themes included the physical work, the passion, and challenges faced. The strong effort required in dairy farming for the ongoing success of their farms was also frequently mentioned.



Care for the environment:

There was overall optimism, and a theme of dedication expressed when discussing efforts to care for the environment. This included mentions of their commitment to sustainable practices, the challenges faced in environmental stewardship, and the importance of protecting natural resources for future generations.



Amount of knowledge:

Respondents noted the complexity of the work, the diverse skill set needed, and the importance of scientific and technical knowledge. They took pride in their expertise and wanted to be recognised for their understanding and proficiency in managing their farms.



Actually caring & animal welfare:

Respondents felt strongly that they wanted the wider community to know how much they care about the different aspects of their farms. Specifically, caring for their animals, land, environment, community, and future generations. When it came to caring for animals, respondents noted their love and dedication, the importance of animal welfare in their daily practices, and the commitment to high standards of care.



Working for good:

Responses reflected a sense of purpose among dairy farmers, who see their work as essential not only for food production but also to the broader wellbeing of their rural communities and the environment. Alongside this, a strong commitment to animal welfare, environmental stewardship, community support, and national economic contribution were common themes under the banner of working for good.

“The opportunities for young people, so that they either go into farming, or dairy support areas.”

“How good the job opportunities are. You can start as an assistant and work your way to farm ownership.”

One word to describe the sector

When asked to sum up their opinion of the sector in just one word, positive came through, alongside similar words like optimistic and exciting – emphasising that despite a few years of challenging seasons, from high costs, to weather impacts, farmers' views of the sector they work in are predominantly positive.

Below summarises these results, with the larger words being those mentioned more often than those that are a smaller size.



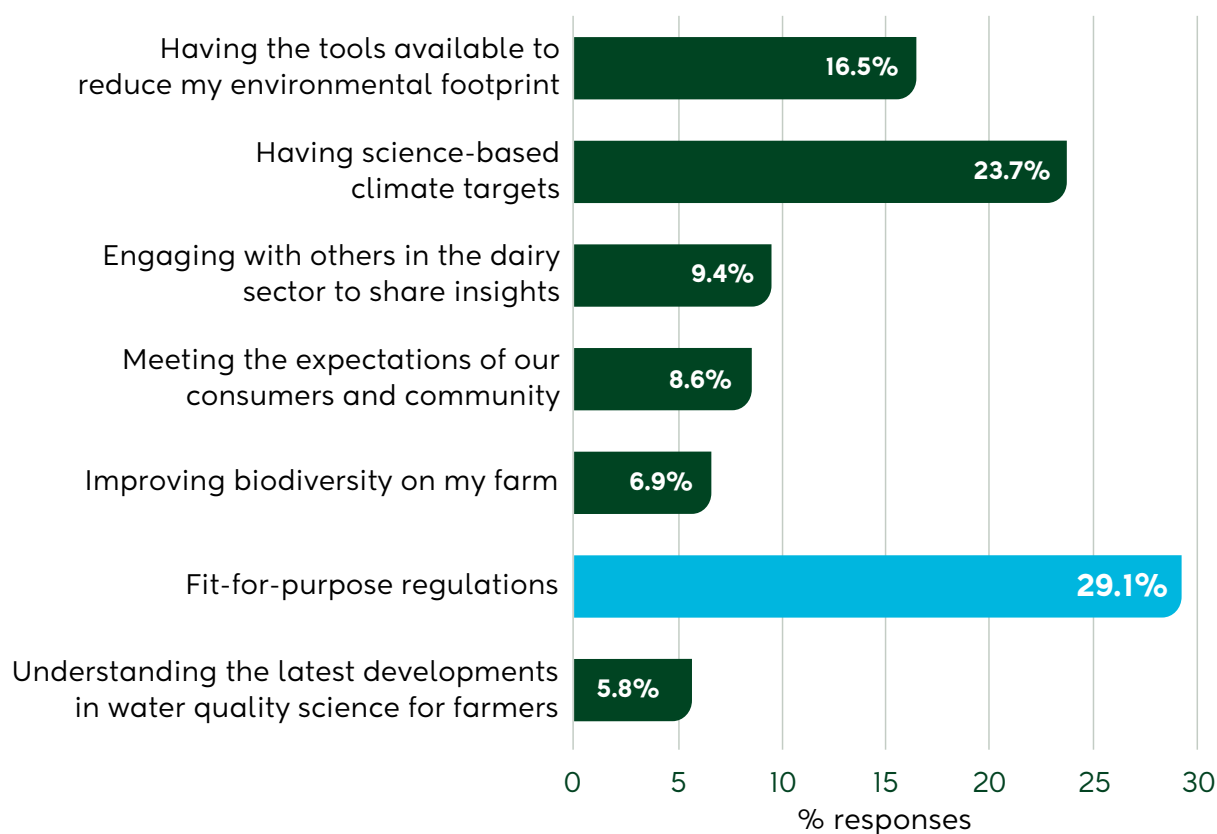
“I wish people understood how much passion, responsibility, and deep care for animals and the environment there is behind dairy farming. It’s not just about producing milk; it’s a way of life that demands resilience, sacrifice, and a real connection to nature. Most farmers are working hard to be sustainable and ethical, but from the outside, people often only see the negatives.”



Climate and environment

Farmers felt strongly that climate targets should be science based, regulations must be fit for purpose and further tools are needed to reduce environmental footprint.

When it comes to climate & environmental matters, what is most important to you (please select up to 3)?



“We take environmental issues very seriously.”

“Animal and environmental welfare is at the forefront of everything we do.”



Farm workplaces and productivity

Ensuring a good work/life balance came out on top for what matters to farmers in the farm workplace, closely followed by finding good staff and the adoption of new technologies.

Thinking about farm workplace & productivity matters, what is most important to you (please select up to 3)?

20.4%

Ensuring a good work/life balance for those on farm

11.8%

Learning from others in my sector

4.2%

Animal health & biosecurity practices

16.8%

Adopting technology that benefits my farm

8.9%

Rate of genetic gain within herd

16.2%

Finding & retaining good staff

4%

Developing farm leadership skills

13.2%

Adopting more efficient workplace practices

4.5%

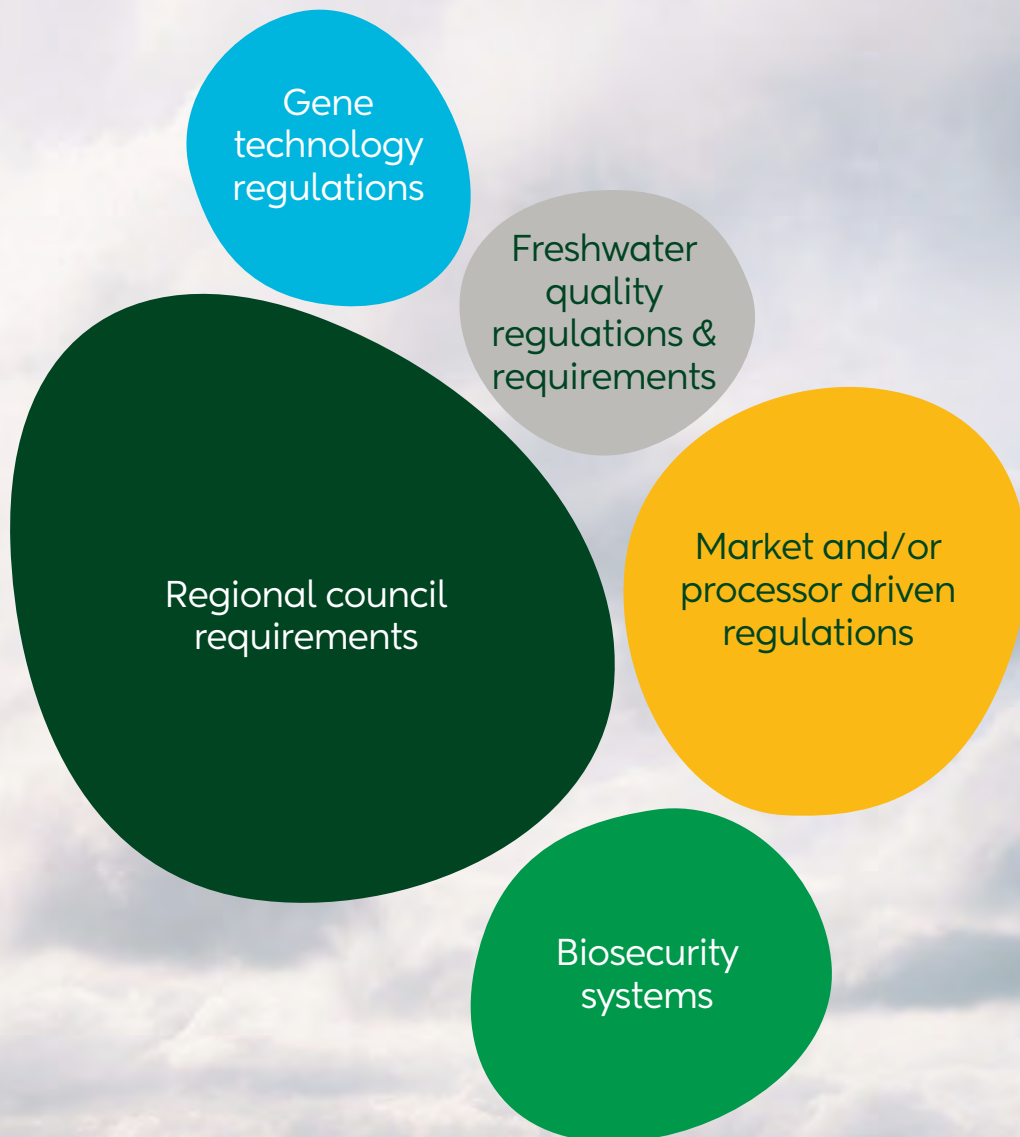
Access to education & training for me & my staff

“It’s a great career where you can run your own business and generate a lot of wealth for your family and the country. Exports is money coming into the country.”

Regulation

A large portion of farmers (42.5%) want to see regional council requirements work better at the farm gate. Alongside this, market & processor regulations (24.0%) also ranked highly as an area for improvement.

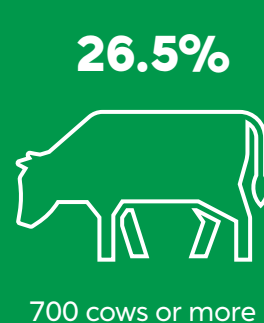
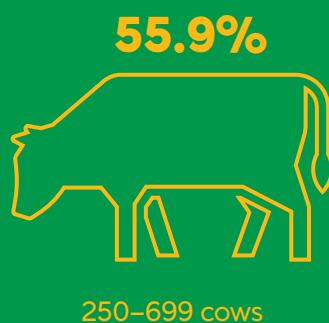
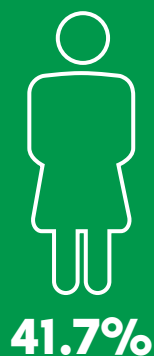
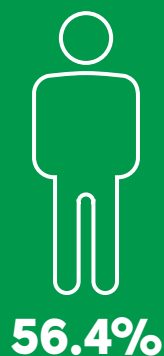
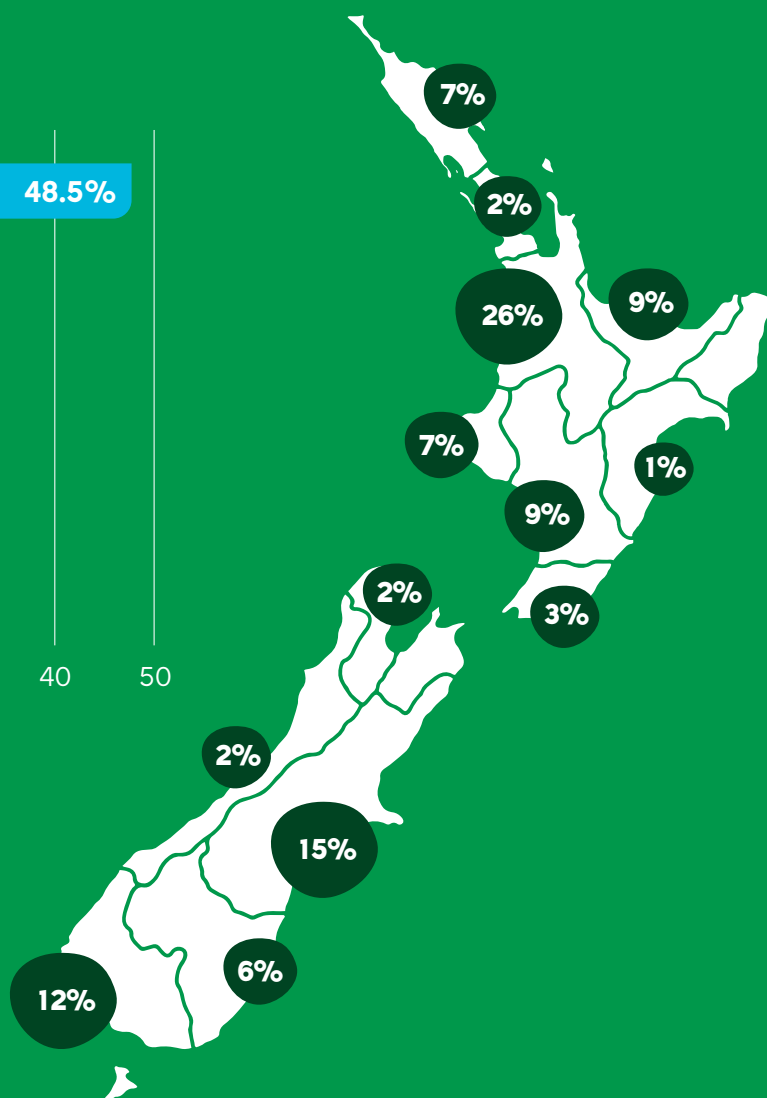
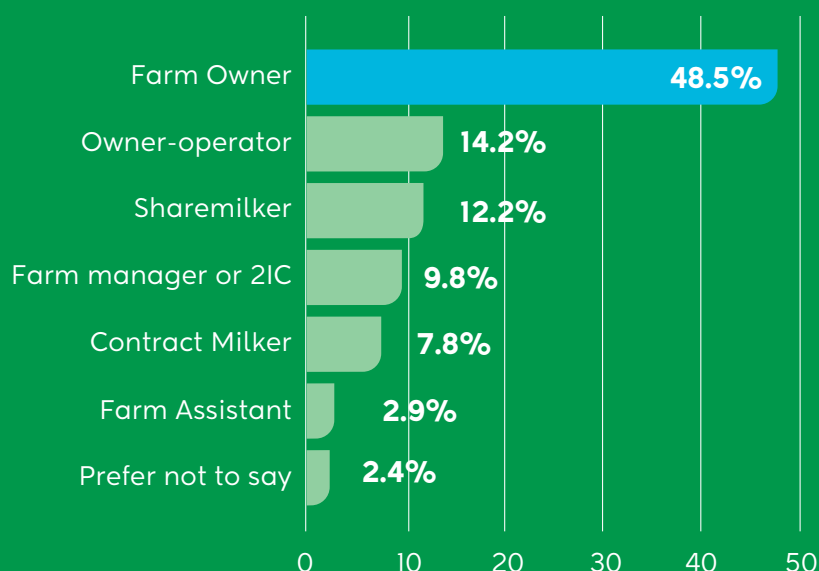
Thinking about regulation, what areas require the most improvements to work better for farmers (please select up to 2)?



Respondent demographics

What region do you currently work in?

What is your current role on farm?



This report provides insights on the outlook of dairy farmers, based on information provided to DairyNZ, through a survey carried out in April and May 2025. There were 204 responses to the survey. Weighting was used to ensure that the results matched the herd size and regional distribution of New Zealand dairy farms as closely as possible. Demographic information provided is unweighted.

Dairy sector facts



Herds and cows

Total number of herds	10,485
Average herd size	448
Number of milking cows	4.7 million

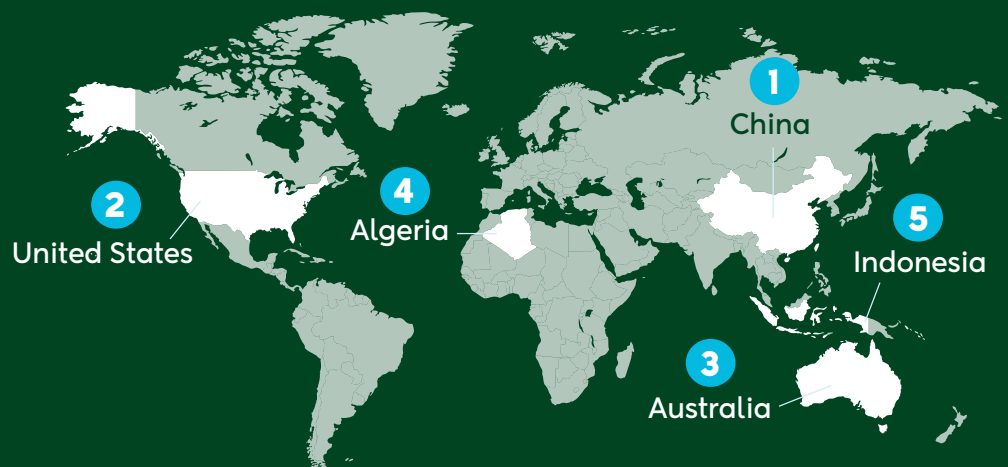


Milk production

20.5 billion	litres of milk processed by New Zealand dairy companies in 23/24
1.88 billion	kilograms of milksolids produced by dairy farmers in 23/24.
1.7 million	total effective hectares of dairy land in New Zealand

Top 5 market for New Zealand dairy exports

95% of our products are exported to around **130 countries** and an estimated **90 million people annually** could consume 2.5 serves of NZ dairy per day.



Export value **\$25 billion**

Dairy is our largest export earner, generating around **\$25 billion**, which is **1/4 of the value** of all New Zealand exports.



Employment **50,000 people**

The dairy sector directly employs around **50,000 people**.

Sources:

New Zealand Dairy Statistics 2023–24

Dairy's Economic Contribution to New Zealand Report August 2023

MPI Situation and Outlook for Primary Industries December 2024

Top comparisons from previous surveys

In previous View from the Cowshed reports we asked a range of questions, which differ slightly from questions asked in the 2025 report. While noting this, there are still a few key trends we can observe when comparing to previous reports.

Key issue of rising farm costs

Increasing costs for expenses on farm was previously the top issue for the profitability of farming businesses (other than the farm gate milk price) for respondents in 2023. This compares similarly to 2025, where increasing costs for expenses on farm was the top issue with respondents. These costs according to 2025 respondents included inputs (feed, fertiliser), compliance costs, and rates costs.

Regulatory stability remains critical

Regulatory changes and compliance costs were the next top issues in 2023, followed by finding good staff. This compares similarly to 2025, regulatory compliance, regional weather and finding good staff. The top issue for the sector overall in 2025 being long term regulatory certainty, also mirrors farmers concerns in the 2023 report where government regulatory changes were a top issue.

Prouder to work in dairy

In comparison to 2021, respondents feel prouder to be working in the dairy sector, with those who strongly agreed jumping from 26.2% to 55.4%, and those who agreed up from 26.8% to 29.4%.

More positive outlook

In previous years respondents were asked how the outlook of their community would change in the next three years. Respondents have a more positive outlook, as only 5% in 2023 believed the outlook for the community would improve, whilst this year 27% believe the outlook for the dairy sector will improve.

The image features a blurred background of a rural landscape with green hills and a red tractor. In the foreground, a wooden crate contains several white plastic milk jugs. The Dairynz logo is centered in the upper half of the image.

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dairynz.co.nz