



Turning regional production into national income

Dairy's economic
contribution to New
Zealand

4 June 2026



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DATA LOGIC ACTION



Key points

Note this report was completed before the Iran conflict and associated impacts on fuel, fertiliser and other input costs. The export data available to us will not capture any of the potential decline in demand from a slower world economy.

Dairy is one of New Zealand's core economic platforms

- Dairy generated \$10.7b of direct GDP in the year to March 2024 (latest official data available), equal to 2.8% of the national economy.
- That contribution was split between \$6.4b from dairy farming and \$4.3b from dairy processing.
- On a sector-by-sector basis, dairy farming is the largest goods-producing sector, and dairy processing is the second largest.
- The sector's importance is especially visible outside the main metropolitan centres. Dairy accounts for 12.1% of West Coast GDP, 10.6% of Southland GDP, 8.3% of Taranaki GDP and 7.8% of Waikato GDP.
- Dairy therefore spreads economic activity into regions where alternative large-scale industries are thinner on the ground. In Waikato and Canterbury alone, direct dairy GDP is close to \$4.8b.

Its contribution reaches households through jobs and wages

- The sector directly supported 51,800 jobs in the year to March 2024.
- Employment has shifted gradually toward processing, which now accounts for 29.8% of dairy jobs after rising from 14,660 jobs in 2020 to 15,430 in 2024.
- Processing employment has grown 81.7% since 2000, while the wider primary and manufacturing sectors have been largely flat. This long-run performance matters because processing jobs are generally higher paid and anchored in regional supply chains.
- Dairy is a cornerstone employer in several districts. South Taranaki has 3,150 dairy employees, representing 25.4% of all jobs in the district, while Waikato employs more than 10,000 dairy workers.
- The wage channel is substantial. Dairy paid almost \$4b in wages in the year to December 2024, comprising \$1.5b from dairy farming and \$2.5b from dairy processing.
- Dairy processing wages remain well above the economy-wide median at \$95,540. Median dairy farming wages have moved close to the national median, reaching \$59,950 in 2024.



- The value of dairy employment is amplified in places with high processing intensity. In Waimate, dairy represents 37.3% of employment but 48.9% of wages; in South Taranaki, 25.4% of jobs translate into 47.6% of wages; in Southland district, 19% of jobs translate into 26.9% of wages.

Exports turn regional production into national income

- Dairy exports reached \$28.8b in the year to December 2025, making dairy New Zealand's largest goods export sector by a wide margin.
- Dairy accounted for 35.8% of goods exports and 25.2% of total goods and services exports. Its export earnings were around 2.8 times meat exports, 4.8 times fruit and nuts, and 11.3 times wine exports.
- Export growth has strengthened the sector's national role. Total goods exports increased by \$17b between 2021 and 2025, and dairy contributed \$8.3b (49%) of that increase.
- Whole milk powder (WMP) remains the largest product group at 31.9% of dairy export value. WMP exports have continued to grow, from \$8.3b in 2021 to \$9.2b in 2025 (10.2% increase).
- However, WMP's share of dairy exports has fallen from 40.7% in 2021 as butter, cheese, protein products, infant formula, skim milk powder and fluid milk and cream have grown faster: the export base is diversifying by product.
- Butter and dairy spreads reached \$6.1b in exports in 2025, up 110% since 2021. Cheese reached \$3.5b (up 63.9%), protein products were \$3.2b (up 34.3%), and infant formula, skim milk powder and fluid milk and cream each generated around \$2b.
- Dairy also sells into a broad set of markets. New Zealand dairy products were exported to 149 markets in 2025, and the top five destinations accounted for 53.2% of exports – a lower concentration than any other top 10 goods export sector.

The sector supports a wider production ecosystem

- Dairy's economic footprint extends well beyond the farm gate. Dairy farmers spent around \$12.8b on inputs in the year to March 2024, including \$6.3b of purchases from the wider economy and \$6.4b in returns to land, labour, and capital.
- Dairy farming is a top 10 purchaser in 35 industries that together represent 41.4% of GDP. These purchases support activity in agricultural services, fertiliser and pesticide manufacturing, financial services, legal and accounting services, pest control, veterinary services and other professional services.
- Dairy processors spent nearly \$19b on raw milk and another \$6.4b on wider goods and services, alongside \$4.8b in returns to capital, land, and labour.



- Processing demand supports firms in road transport, polymer and rubber products, equipment rental and hiring, gas and water supply, advertising and management services, and warehousing and storage.

Dairy's resilience depends on continued productivity gains

- The sector is exposed to global commodity cycles: the dairy price index had a standard deviation equal to 19% of its average over January 2013 to March 2026.
- However, dairy purchases and operating expenses were steadier, with a 14.2% standard deviation over 2013-2024. The sector therefore acts as a regional shock absorber: farm and processing operations continue to buy inputs, employ workers, pay wages and move product even when prices fall.
- Dairy has also increased export value without relying on a larger herd. The national herd has fallen 6.8% since its 2015 peak while annual production per cow has risen 14% to 422kg of milk solids.
- The overall message is clear: **dairy is not only a large sector; it is a regionally distributed, high-wage, export-intensive platform that supports a broad domestic supply chain and converts New Zealand's natural advantage into durable national income.**



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1. Economic contribution

1.1. Dairy's contribution to GDP

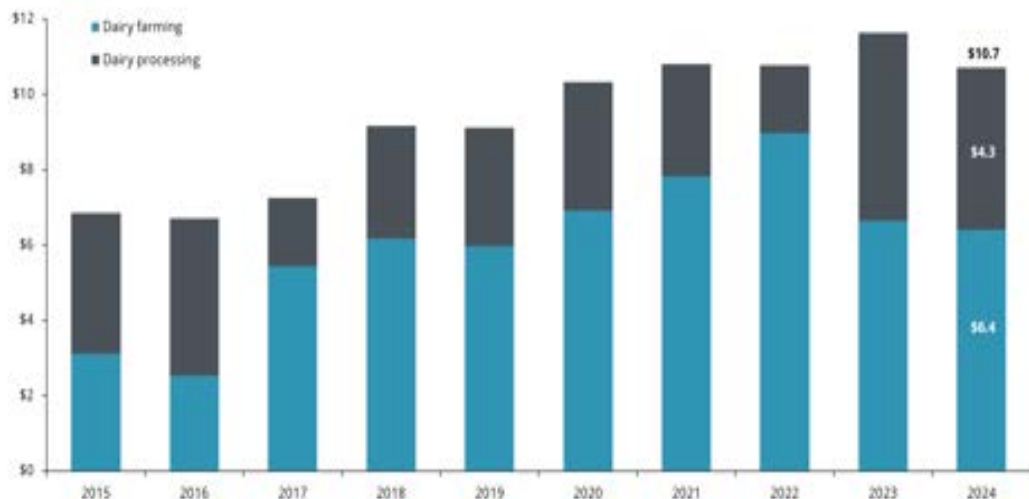
Dairy added \$10.7bn directly to New Zealand GDP in 2024

In the year to March 2024, the dairy sector made a direct \$10.7b contribution to New Zealand's GDP.

This was below the previous year's \$11.6b, mainly reflecting a fall in dairy processing value added due primarily to easing dairy export prices after very high prices in the year to March 2023.

The dairy sector accounted for 2.8% of national GDP, a share that has been broadly stable over the past decade. Dairy farming contributed \$6.4b, or 1.7% of GDP, while dairy processing contributed \$4.3b, or 1.1%.¹

FIGURE 1: DAIRY SECTOR CONTRIBUTION TO GDP, \$B, NOMINAL, YEAR TO MARCH



Source: Statistics New Zealand, Sense Partners

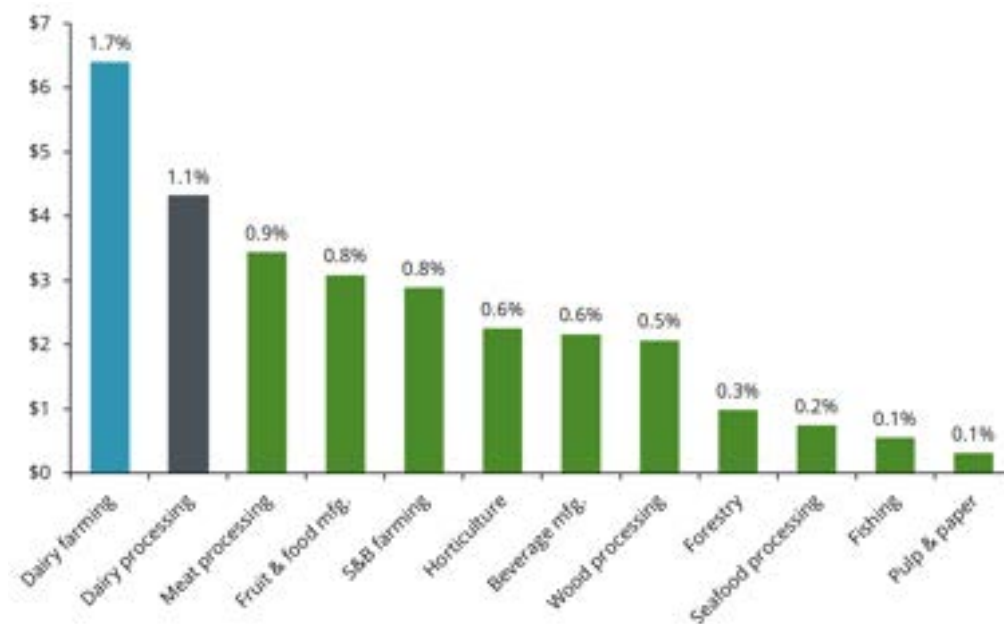
Dairy sits at the top of New Zealand's goods-producing economy

At \$6.4b, dairy farming is the largest goods-producing sector across the primary and manufacturing industries. Dairy processing ranks second at \$4.3b, ahead of meat processing at \$3.4b, or 0.9% of GDP.

¹ In our previous (2023) report, we used our own estimate of farming and processing GDP for 2023 as official data was not available. The official data later showed a similar overall size of the dairy sector (\$11.3b estimate, \$11.6b official) but a somewhat different split between farming and processing.



FIGURE 2: INDUSTRY VALUE ADDED, \$B, YEAR TO MARCH 2024



Source: Statistics New Zealand, Sense Partners

The sector is a major economic anchor across regional New Zealand

Because dairy is a land-based activity, its footprint is distributed across the country rather than concentrated in the largest urban centres. That gives dairy an important role in spreading income, jobs, and investment across regional New Zealand.

The regional dependence is most obvious on the West Coast, where dairy makes up 12.1% of regional GDP (see Figure 3 overleaf). Dairy also accounts for 10.6% of GDP in Southland and 8.3% in Taranaki.

Dairy remains important even in regions with large and diversified economies. In Waikato, 7.8% of a \$36.5b regional economy came directly from dairy. In Canterbury, dairy contributed 3.7% of a \$51.7b regional economy.

Dairy's contribution to regional GDP in 2024 has declined relative to 2023 in most regions due to the dairy sector contracting slightly at the national level and regional GDP expanding. The exceptions are Auckland, where dairy processing output grew faster than regional GDP, and Canterbury, Southland and Tasman, where milk-solids growth has outpaced regional GDP growth.

Dairy is the largest of 54 sectors in the West Coast, Taranaki, and Southland. It is also the largest sector by GDP in Waikato. Dairy ranks among the 10 largest sectors in nine regions.

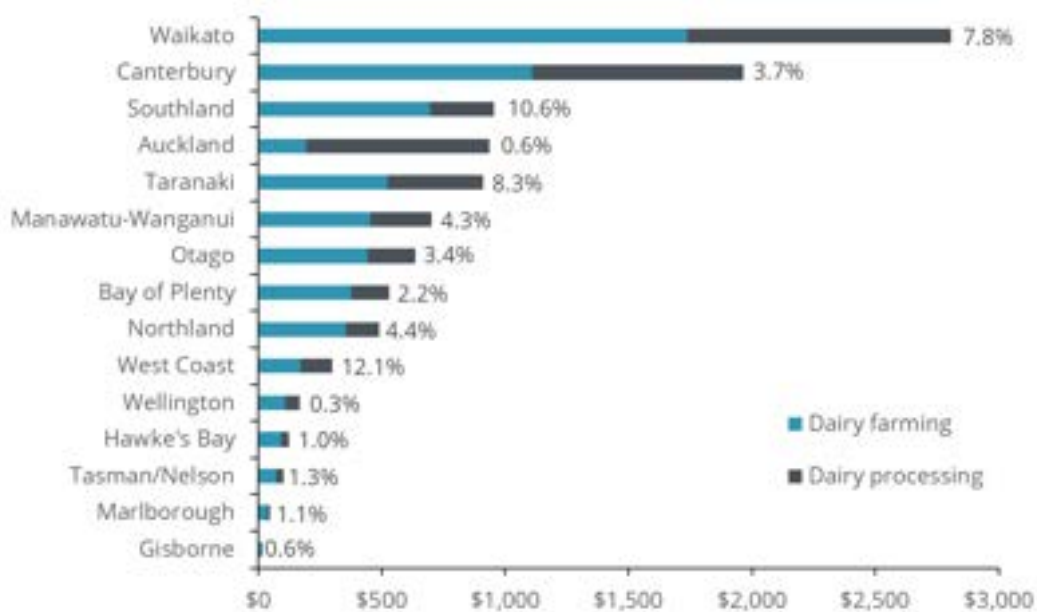
Dairy is comparatively smaller in the main metropolitan (services-centric) economies of Auckland and Wellington, and in regions where horticulture dominates, such as Gisborne, Hawke's Bay, Tasman and Nelson.

The dollar contribution is largest in Waikato, where dairy GDP exceeded \$2.8b, and Canterbury, where it was close to \$2b. Southland and Taranaki were each close to \$1b, while Manawatu and Otago contributed around \$0.7b and \$0.6b respectively.



TURNING REGIONAL PRODUCTION INTO NATIONAL INCOME DAIRY'S ECONOMIC CONTRIBUTION TO NEW ZEALAND

FIGURE 3: REGIONAL GDP CONTRIBUTION, \$M, YEAR TO MARCH 2024



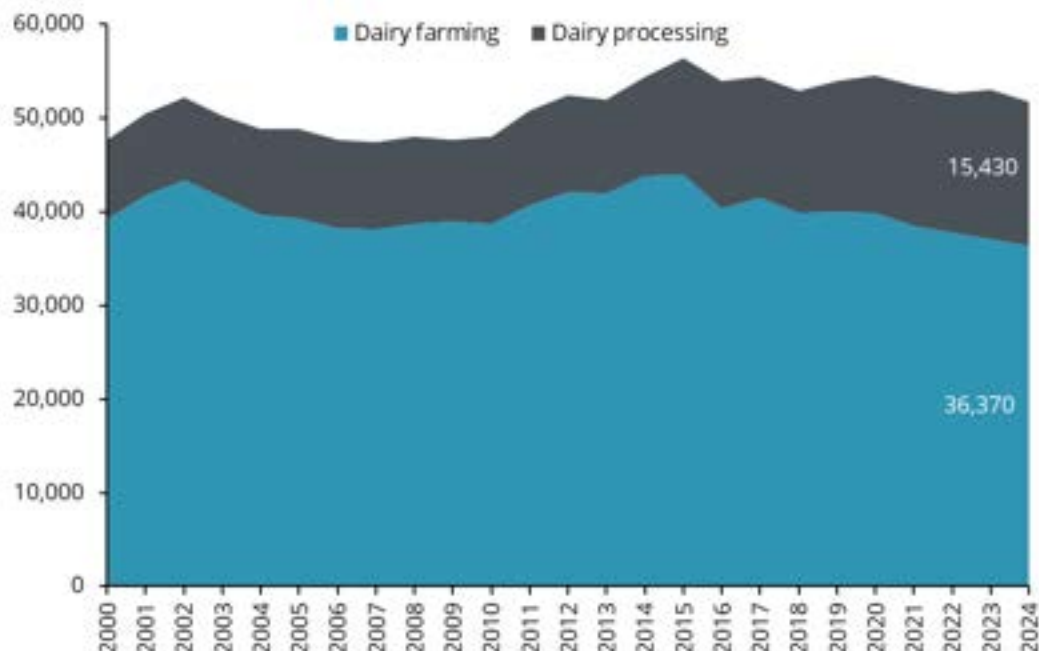
Source: Statistics New Zealand, Sense Partners



1.2. Dairy's contribution to employment

Total dairy employment has held broadly steady since 2015

FIGURE 4: DAIRY SECTOR EMPLOYMENT, YEAR TO MARCH



Source: Statistics New Zealand, Sense Partners

Stats NZ data show that the **dairy sector supported 51,800 jobs in the year to March 2024** (latest official data available).

The composition of dairy employment has been shifting toward processing. Dairy processing jobs increased 5.3%, from 14,660 in 2020 to 15,430 in 2024. Alongside an 8.9% fall in farming employment over the same period, this lifted processing's share of dairy employment from 26.9% to 29.8%.

The stability of dairy output despite tighter labour conditions points to continued improvements in on-farm labour productivity.

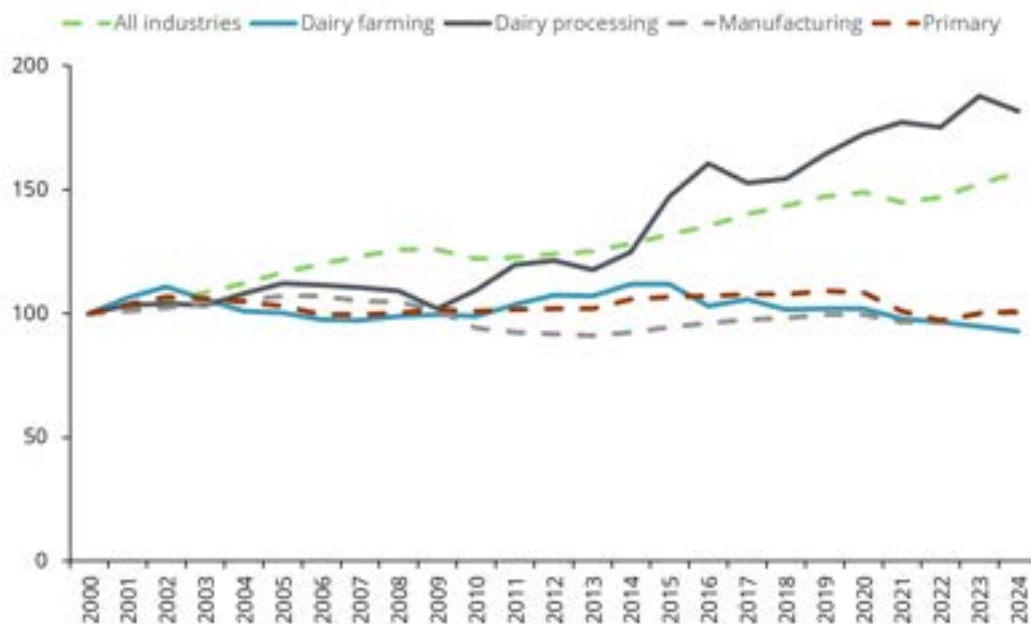
Dairy processing has delivered job growth that the wider primary sector has not matched

Since 2000, dairy processing employment has increased by 81.7%. That stands in contrast to the wider primary sector, where employment has risen only 0.9%, and manufacturing, where employment has increased by just 0.3%.

Dairy farming jobs have been more cyclical. They are 7.2% lower than in 2000, although the path has not been one-way: farming employment rose through much of 2011-2020 before declining again from 2021.



FIGURE 5: EMPLOYMENT INDEX BY INDUSTRY, 2000 = 100, YEAR TO MARCH



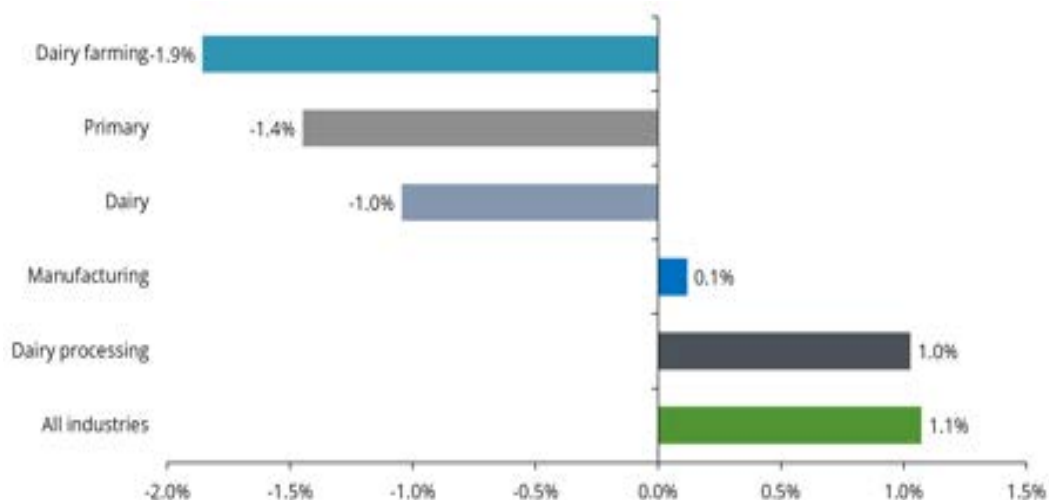
Source: Statistics New Zealand, Sense Partners

In recent periods, dairy as a whole has trailed economy-wide employment growth, largely because service-sector employment has expanded strongly.

Dairy processing has outperformed overall manufacturing employment, growing by an average 1.0% a year since 2020 compared with 0.1% a year for manufacturing overall.

Dairy farming employment has fallen by an average 1.9% a year over the past five years, a slightly steeper fall than the 1.4% average annual decline across the wider primary sector.

FIGURE 6: AVERAGE ANNUAL JOBS GROWTH, YEAR TO MARCH 2020-2024



Source: Statistics New Zealand, Sense Partners



Labour constraints and rising wages are changing farm operating models to be more capital and technology intensive

Dairy farming has recorded declines in both wage-and-salary employment and self-employment over the past five years. After peaking at 43,920 jobs in 2015, farm employment has since trended lower.

FIGURE 7: DAIRY FARMING: WORKERS PAID WAGES/SALARIES VS SELF-EMPLOYMENT



Source: Statistics New Zealand, Sense Partners

Between 2020 and 2024, wage-and-salary jobs fell by 1.8% a year on average, while self-employment fell by 2.0% a year.

As milksolids production has not followed suit, it is reasonable to surmise that dairy farms are becoming more capital-deep and more productive in terms of production per labour unit. That is, farmers are increasingly using technology such as automatic teat sprayers and cup removers, collar technologies for drafting and virtual fencing in response to labour shortages.²

In many districts, dairy is a crucial source of jobs and incomes

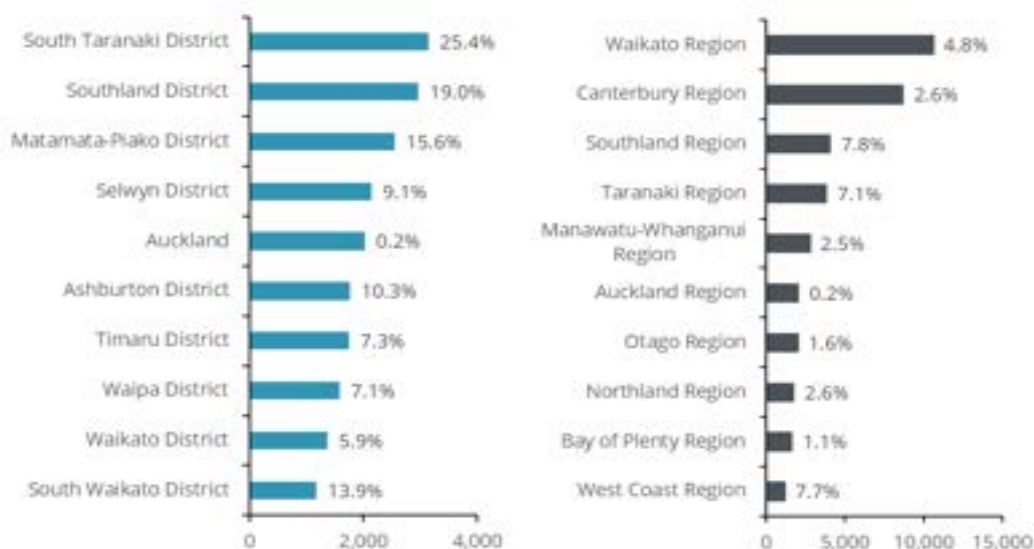
The sector is a significant employer across much of regional New Zealand. Figure 8 shows the 10 largest districts and regions for dairy jobs, with the bars' labels showing dairy's share of local employment.

South Taranaki has the largest district-level dairy workforce, with 3,150 employees. These farming and processing jobs account for 25.4% of all employment in the district. Waikato employs more than 10,000 dairy workers, equal to 4.8% of all employees in the region. The region accounts for about 26.7% of the national dairy workforce.

² We do not include in this report employment in agri-tech companies such as Halter that have emerged to meet the higher demand for technology solutions, but this employment indicates how the nature of the dairy sector ecosystem is changing over time.



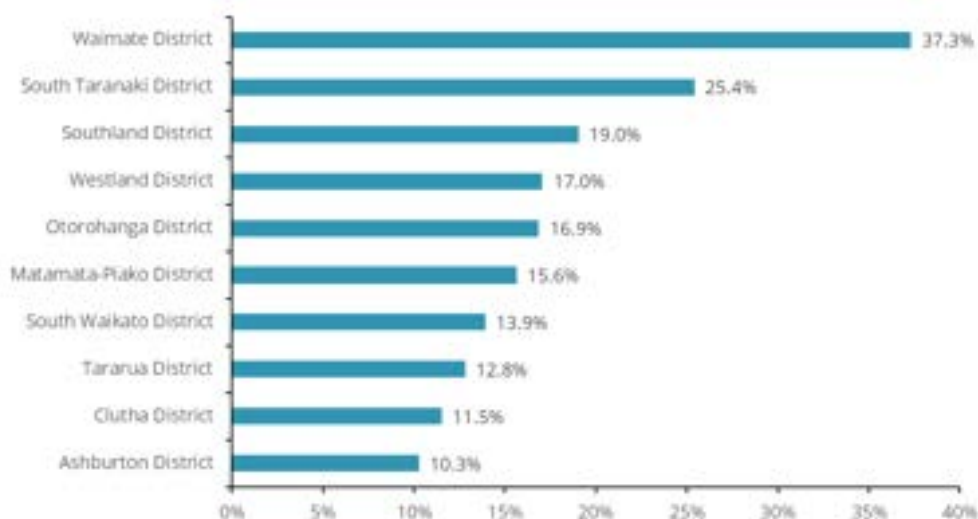
FIGURE 8: COUNT OF DAIRY EMPLOYEES, TOP 10 DISTRICTS AND REGIONS



Source: Statistics New Zealand, Sense Partners

Figure 9 overleaf highlights the districts where dairy has the largest employment share. More than one in three workers in Waimate are employed in dairy. Dairy also accounts for about 25.4% of employment in South Taranaki and 19% in Westland, with another seven districts recording that more than one in every 10 jobs is in dairy.

FIGURE 9: DAIRY SHARE OF TOTAL EMPLOYEES, TOP 10 DISTRICTS



Source: Statistics New Zealand, Sense Partners

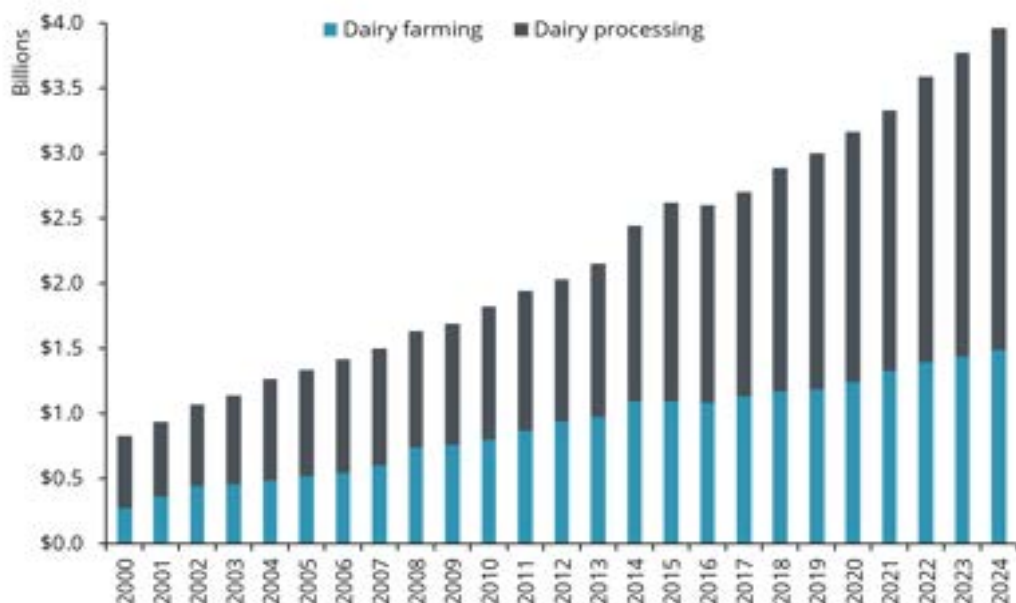


1.3. Dairy's contribution to wages and income

Dairy pumped almost \$4bn of wages into the economy in 2024

In the year to December 2024, dairy paid nearly \$4b in wages across New Zealand. Dairy farming accounted for \$1.5b, up 19.6% since 2020, while dairy processing accounted for \$2.5b, up 28.6%.

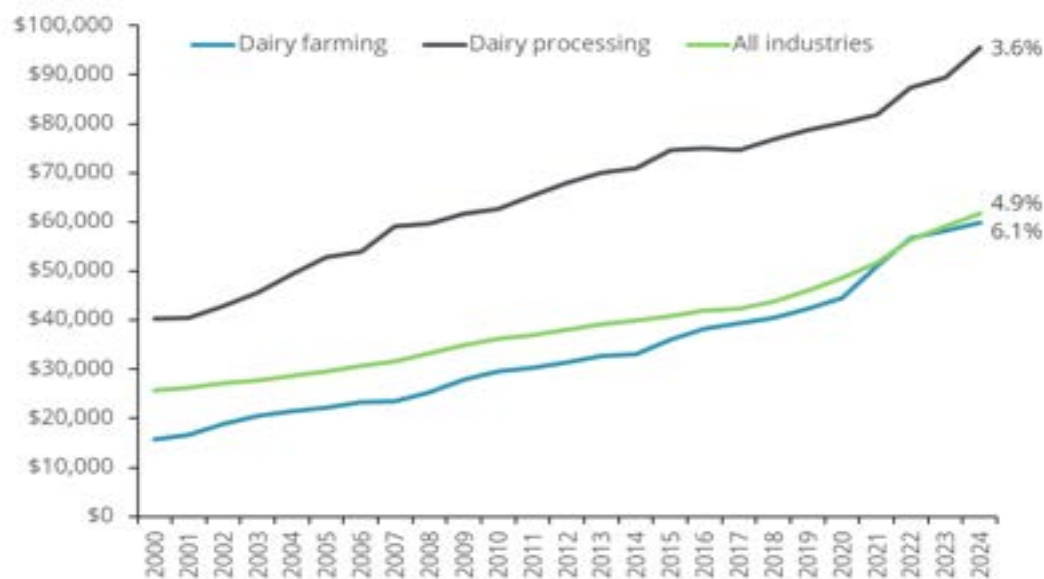
FIGURE 10: DAIRY SECTOR TOTAL WAGES PAID, YEAR TO DECEMBER



Source: Statistics New Zealand, Sense Partners

Dairy farming wages have moved close to the national median

FIGURE 11: DAIRY SECTOR MEDIAN WAGES, YEAR TO MARCH



Source: Statistics New Zealand, Sense Partners

Median dairy farming wages grew by an average 6.1% a year between 2020 and 2024, faster than the 5.0% average across the whole economy. The median dairy farming wage caught up

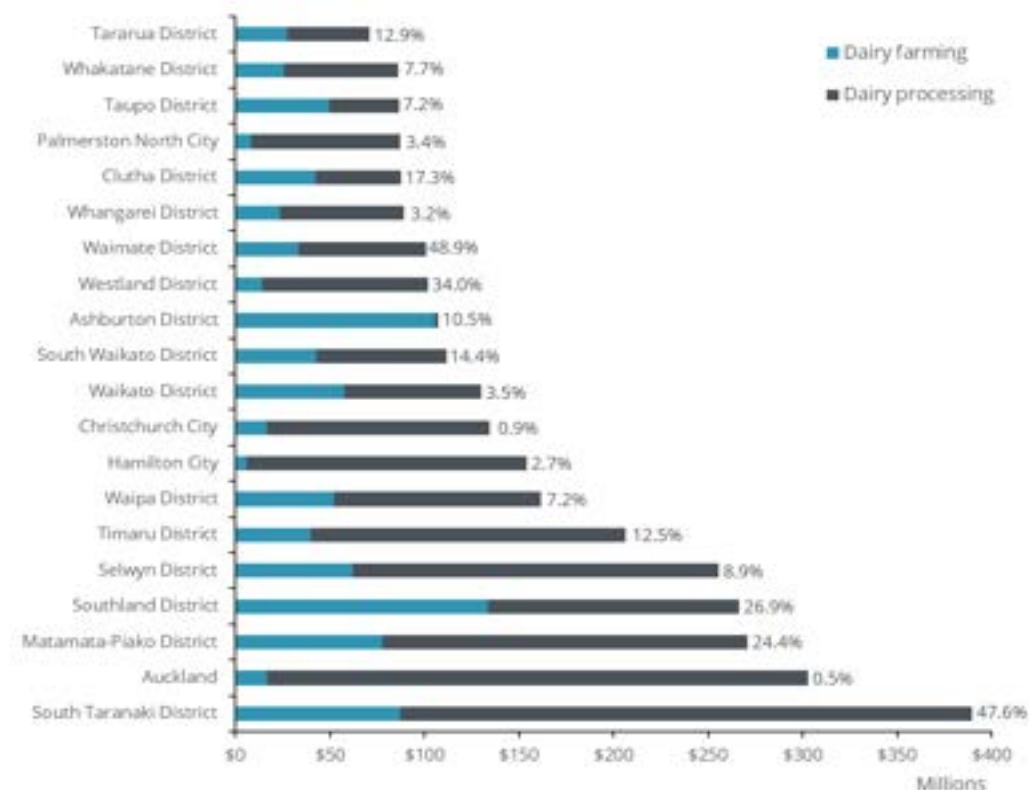


with the economy-wide median in 2022 and reached \$59,950 in 2024, only \$1,810 below the all-sector median.

Dairy processing continues to pay a substantial premium. Its median wage was \$95,540 in 2024, well above the economy-wide median, although its average annual growth rate of 3.6% from 2020 to 2024 was slightly below the national average.

Higher wages lift the local value of each dairy job

FIGURE 12: DAIRY SECTOR TOTAL WAGES PAID, TOP 20 TA, 2024



Source: Statistics New Zealand, Sense Partners

Across New Zealand, dairy's wage premium means its contribution to local household income is often larger than its employment share alone suggests:

- In Waimate, dairy accounts for 37.3% of employment but 48.9% of wages paid.
- In South Taranaki, the Whareroa processing site and the high median wage in processing mean dairy's 25.4% employment share translates into 47.6% of wages.
- The same pattern is evident in Southland district, where dairy provides 19% of jobs and 26.9% of wages.



Dairy pays a premium relative to other primary sector industries

Figure 13 compares dairy wages³ with sectors that often operate in similar locations and draw on overlapping skills. It shows that both dairy farming and dairy processing pay materially more than comparable activities.

- At \$59,950, the median wage in dairy farming was 13.8% above poultry and deer farming and 19.9% above sheep, beef cattle, and grain farming.
- The dairy processing premium is larger. At \$95,540, the median wage was 52.9% above meat processing and 63.9% above beverage and tobacco manufacturing.

These wage premiums help dairy compete for labour. For regional economies, a larger dairy presence therefore brings a larger income boost than would be implied by job counts alone.

FIGURE 13: MEDIAN WAGES ACROSS COMPARABLE SECTORS, YEAR TO MARCH 2024



Source: Statistics New Zealand, Sense Partners

Other sectors are responding with stronger wage growth

Dairy farming wages rose by 6.1% a year on average between 2020 and 2024, faster than most comparable sectors. Horticulture grew faster, at 8.3% a year, but from a much lower median wage base.

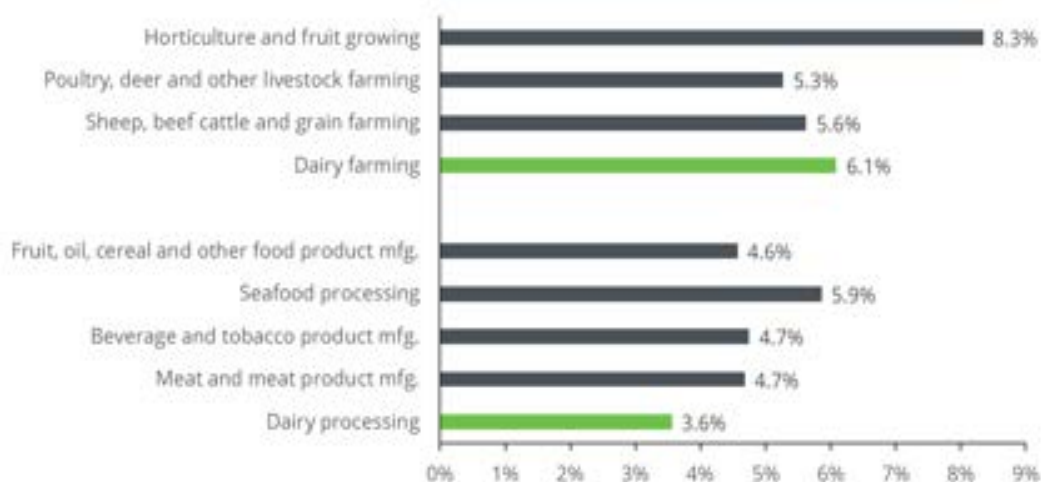
Dairy processing wages grew by 3.6% a year on average from 2020. Because processing wages are already high, that growth still equates to an average annual increase of \$3,833.

This compares with average annual increases of \$4,348 in beverage and tobacco manufacturing, \$3,428 in meat processing, \$2,535 in seafood processing, and \$1,423 in fruit, oil, cereal, and other product processing. The dairy processing premium remains substantial.

³ Data is sourced from LEED Table 1.6: Main earnings source, by industry (NZSIOC).



FIGURE 14: AVERAGE ANNUAL GROWTH IN MEDIAN WAGES, 2020 – 2024



Source: Statistics New Zealand, Sense Partners

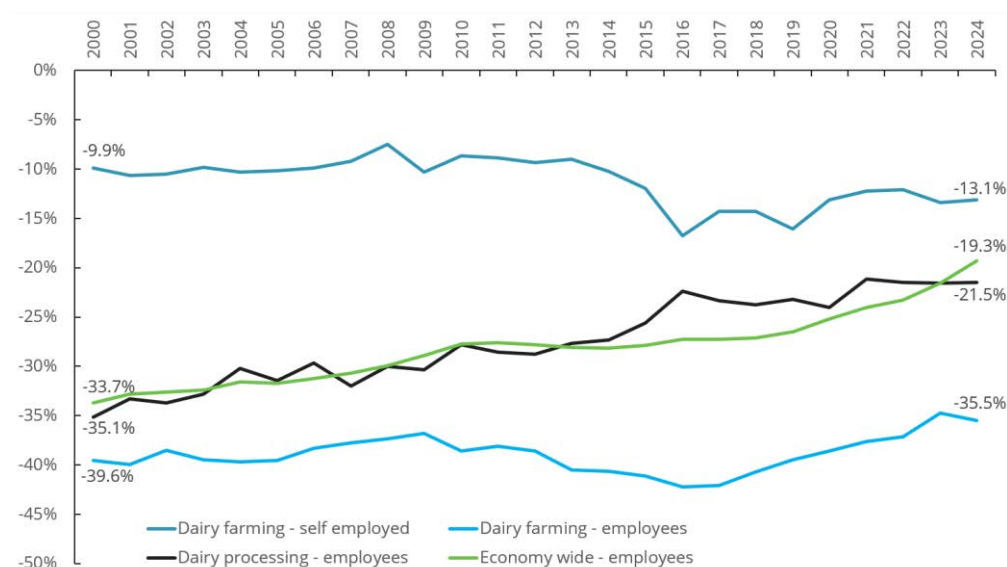
The dairy processing gender wage gap has narrowed steadily

The gender wage gap has been declining in both dairy and the wider economy. In dairy processing, it fell from 35.1% in 2000 to 21.5% in 2024.

Over the same period, women's share of dairy processing employment rose from 29.0% to 35.7%. As female participation increased, the processing wage gap moved closer to the economy-wide gap, which fell from 33.7% to 19.3%.

In dairy farming, part of the gap likely reflects differences in seniority, skills, and experience. Further progress will depend on retaining more female employees long enough for experience and progression to accumulate within the sector.

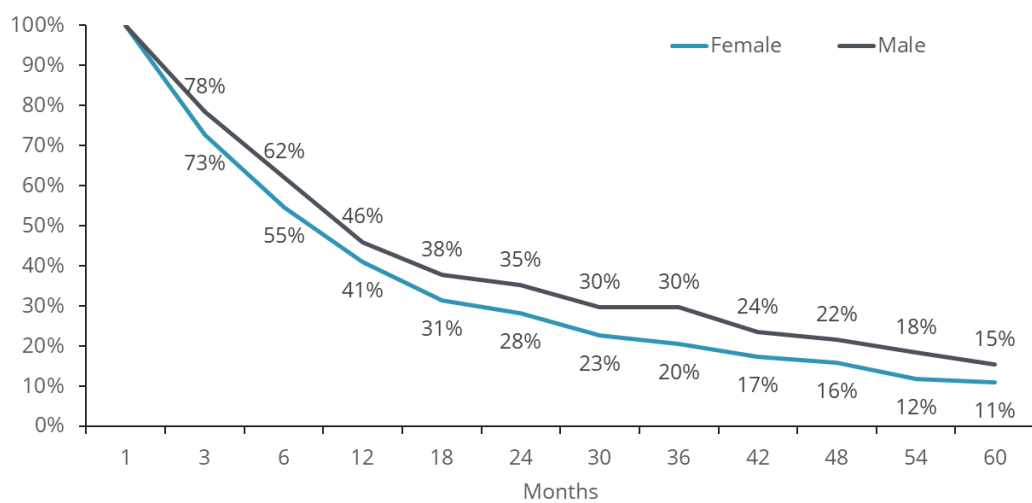
FIGURE 15: AVERAGE WAGE GAP (FEMALES RELATIVE TO MALES)



Source: Statistics New Zealand, Sense Partners



FIGURE 16: DAIRY FARMING RETENTION RATES



Source: Muka Tangata



1.4. Dairy and the Māori economy

Data on the Māori economy remain relatively limited. Government agencies and industry groups have widened their data collections in recent years, but regularity and timeliness are still constraints.

Māori businesses exported \$235m of dairy products in the year to June 2024

Statistics New Zealand data show that businesses operated by Māori authorities exported \$235m of milk powder, butter, and cheese in 2024, up 50.6% from \$156m in 2020.

Māori-owned farms held 185,500 dairy cattle in the year to June 2024, equal to 3.2% of the national total of 5.8m. That was a 120.3% increase from 84,200 in 2020.

The Māori-owned share of dairy cattle therefore rose from 1.4% in 2020 to 3.2% in 2024. Of the 185,500 dairy cattle, 145,800 were milking cows and heifers, up 128.9% on 2020.

Grassland farms operated by Māori-owned businesses represented 4.5% of all farms in the year to June 2024, up from 2.8% in 2020. Their average size fell from 605 hectares to 300 hectares but remained roughly twice the national average of 154 hectares.

Māori dairy assets reached \$11.8bn in 2023

The Māori asset base was estimated at about \$126b in 2023, with primary industries, including dairy farming, accounting for a significant share. Māori collective entities such as iwi trusts and incorporations continue to own substantial land and capital assets in food and fibre.

Māori-owned dairy farming assets increased from \$4.9b in 2018 to \$11.8b in 2023. The 2023 total comprised \$1.15b held by self-employed owners, \$6.25b by employers and \$4.4b by collectives.

Dairy farming was the largest agriculture, forestry, and fishing asset class owned by Māori employers, with \$6.25b of assets and a 38.6% share.

Māori owned 1,209 dairy farming businesses in 2023, the second-largest count after sheep and beef farming at 1,700. Dairy represented 11.3% of all dairy farming businesses, a share that has been stable since 2018.

Māori employment in dairy is gradually increasing

Māori employment has increased across a wide range of industries. In 2023, Māori employees numbered 4,035 in dairy farming and 2,580 in dairy processing. These workers represented 16.9% of dairy farming employees and 16.3% of dairy processing employees, up from 15.0% and 14.8% respectively in 2018.



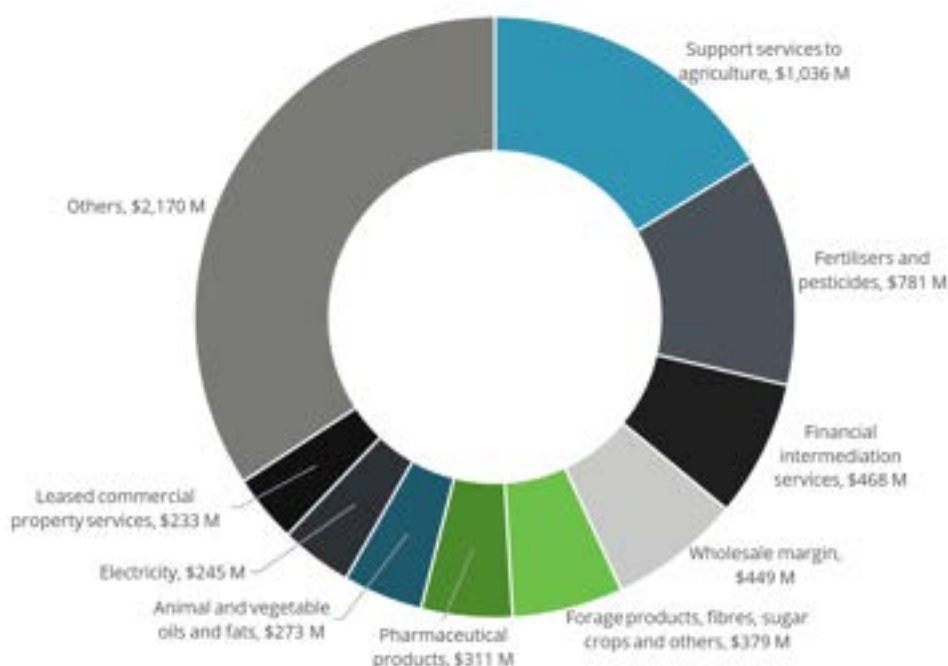
1.5. Dairy's support of other industries

Dairy purchases support activity across a wide range of sectors

Dairy farmers spent about \$12.8b on inputs in the year to March 2024, slightly below the previous year because the value of production dropped slightly.⁴ The total included \$6.3b of purchases from the wider economy and \$6.4b in returns to land, labour, and capital.

Major purchases included more than \$1b in agricultural support services, \$781m on fertilisers and pesticides, and \$468m in financial services.

FIGURE 17: INPUT EXPENDITURE, DAIRY FARMING, NOMINAL, YEAR TO MARCH 2024



Source: Statistics New Zealand, Sense Partners

Dairy farming is a top 10 buyer in 35 sectors whose output accounted for 41.4% of GDP

Agriculture, forestry, and fishing support services generated \$3.1b of GDP in the year to March 2024. Dairy farmers purchased 18.3% of the sector's output, supporting an estimated \$529.3m of GDP and 5,376 of the sector's 31,100 jobs.

Other examples include:

⁴ These farm purchases estimates are based on cost shares from StatsNZ's 2020 input-output (IO) tables. These shares are held constant across years, meaning spending on all inputs scales up and down with dairy farming GDP. We cannot capture any changes to farming's cost or sales structures, and there may be some discrepancies between dairy farming's sales and dairy processing's purchases. An updated IO table from StatsNZ, expected at some point in 2026, will update both sectors' costs and sales structures and resolve any discrepancies. Note the previous 2023 report used an estimate of 2023 dairy farming GDP, which was materially higher than the actual figure.

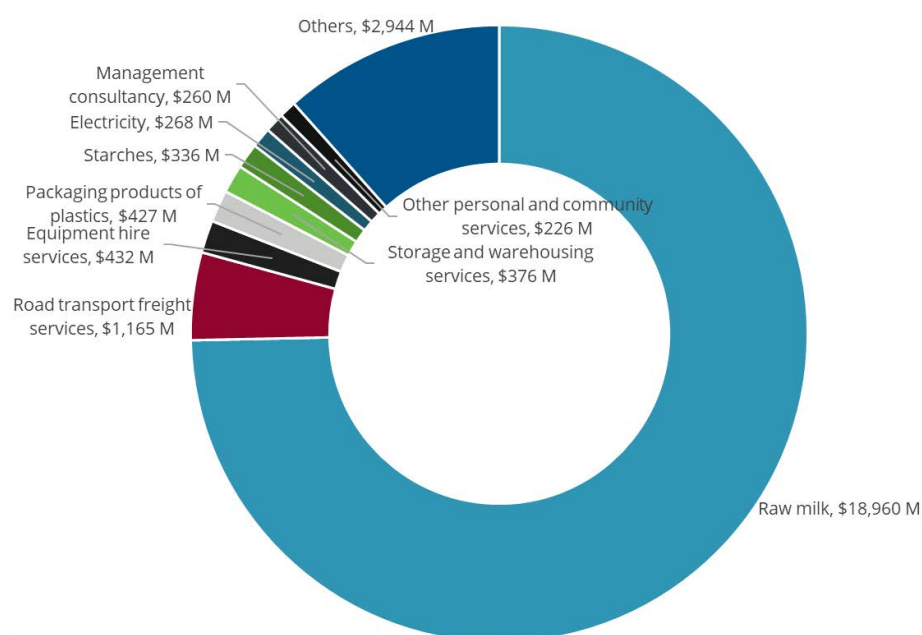


- Fertiliser and pesticide manufacturing: 24.9% dairy share, \$111.8m of GDP, and 365 jobs supported by dairy farming.
- Banking and financing, financial asset investing: 4.0% dairy share, \$372.2m of GDP, and 1,094 jobs supported by dairy farming.
- Sheep, beef cattle, and grain farming: 5.0% dairy share, \$244.6m of GDP, and 930 jobs supported by dairy farming.
- Legal and accounting services: 3.5% dairy share, \$200.1m of GDP, and 1,063 jobs supported by dairy farming.
- Building cleaning, pest control, and other support services: 6.4% dairy share, \$168.1m of GDP, and 2,450 jobs supported by dairy farming.
- Veterinary and other professional services: 21.2% dairy share, \$122.7m of GDP, and 1,093 jobs supported by dairy farming.

Dairy processors spent \$6.4bn on top of farm-gate milk purchase

Dairy processors are major buyers of raw milk, spending nearly \$19b on dairy farming output in the year to March 2024. Beyond that farm-gate purchase, they spent a further \$6.4b on goods and services from the wider economy and generated \$4.8b in returns to capital, land, and labour.

FIGURE 18: INPUT EXPENDITURE, DAIRY PROCESSING, YEAR TO MARCH 2024



Source: Statistics New Zealand, Sense Partners

Dairy processing is a top 10 buyer in 25 sectors whose collective output is almost a quarter of New Zealand's GDP

Key examples among dairy processing inputs include:

- Road transport: 10.4% dairy share, \$427.9m of GDP, and 3,389 jobs supported by dairy processing.
- Polymer and rubber product manufacturing: 12.9% dairy share, \$172.2m of GDP, and 978 jobs supported by dairy processing.



TURNING REGIONAL PRODUCTION INTO NATIONAL INCOME DAIRY'S ECONOMIC CONTRIBUTION TO NEW ZEALAND

- Equipment rental and hiring services: 4.9% dairy share, \$165.3m of GDP, and 567 jobs supported by dairy processing.
- Gas and water supply: 6.7% dairy share, \$88.2m of GDP, and 126 jobs supported by dairy processing.
- Advertising, market research, and management services: 1.2% dairy share, \$88.1m of GDP, and 492 jobs supported by dairy processing.
- Warehousing and storage services: 10.9% dairy share, \$80.2m of GDP, and 549 jobs supported by dairy processing.



2. Export patterns

2.1. Dairy's role in our export economy

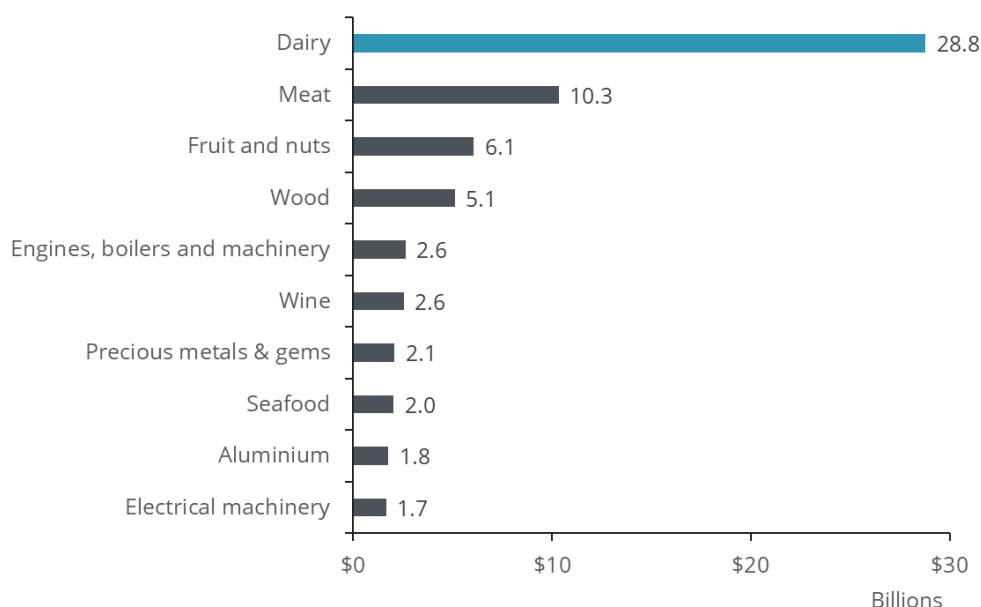
Dairy is New Zealand's largest source of export revenue

Dairy exports reached \$28.8b in the 12 months to December 2025⁵, making the sector the largest contributor to goods export earnings. Dairy accounted for 35.8% of goods exports and 25.2% of total goods and services exports.

Dairy is the largest goods export sector by a wide margin. Export earnings were about 2.8 times meat exports, 4.8 times fruit and nuts, 11.3 times wine, and more than meat, wood, fruit and nuts, wine, and seafood combined.

Dairy earned 3.5 times the combined value of the next four goods categories: engines, precious metals, aluminium, and electrical machinery.

FIGURE 19: TOP 10 GOODS EXPORTS, YEAR TO DECEMBER 2025



Source: Statistics New Zealand, Sense Partners

Dairy exports were also 1.7 times the value of the largest services export, tourism. Travel services, including personal, business, and education travel, reached \$17.2b in the year to December 2025, \$1.2b above the pre-COVID level.

⁵ Latest available data at the time of drafting. Export data is available in a much timelier fashion than GDP by industry data. The GDP by industry data for the year to March 2025 will not be available until November 2026 (i.e. there is a 20-month lag).



Dairy's share of goods exports has moved higher - again

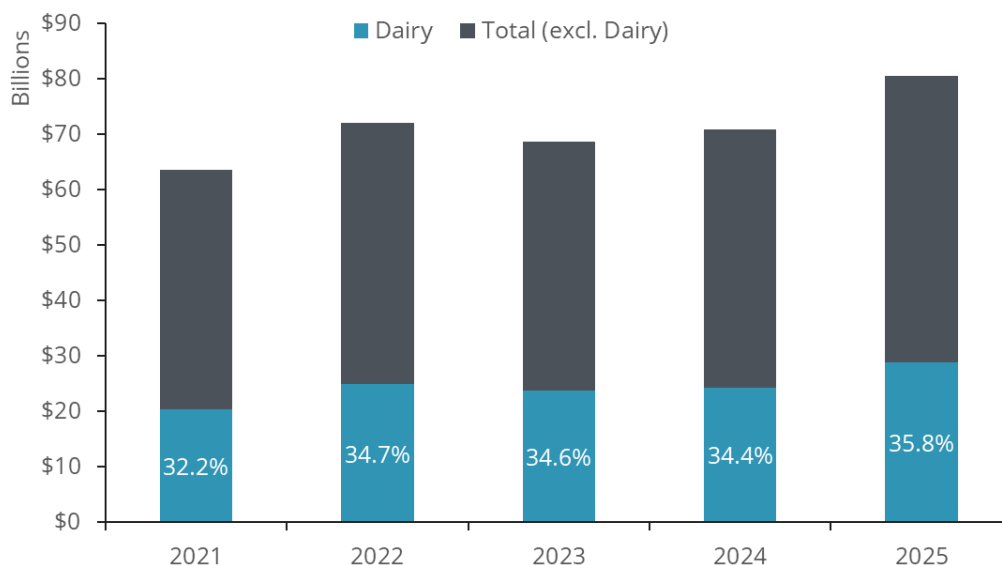
New Zealand goods exports rose 26.8% over the five years to December 2025, reaching \$80.5b.

Excluding dairy, goods exports increased 20.2%, or \$8.7b, over the same period.

Dairy exports grew 40.7%, or 7.1% a year on average, almost twice the 3.7% growth rate for other goods exports.

That growth has lifted dairy's share of goods exports from 32.2% in 2021 to 35.8% in 2025.

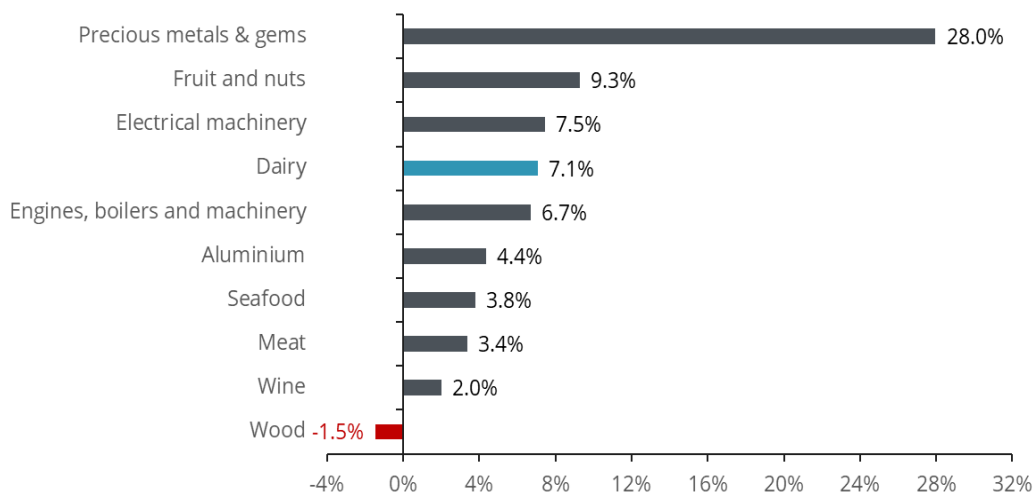
FIGURE 20: DAIRY SHARE OF GOODS EXPORTS, YEAR TO DECEMBER



Source: Statistics New Zealand, Sense Partners

Dairy has been among the fastest-growing goods export sectors

FIGURE 21: AVERAGE ANNUAL GROWTH IN EXPORTS, YEAR TO DECEMBER 2021 – 2025



Source: Statistics New Zealand, Sense Partners

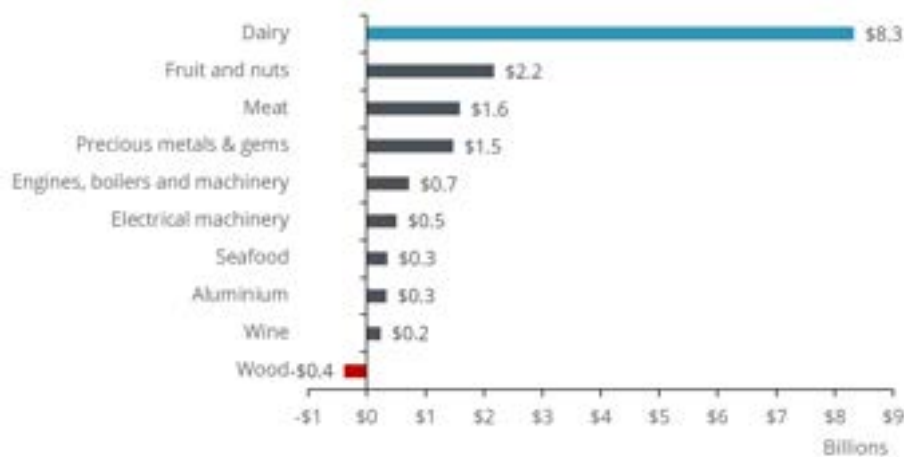


Dairy has added \$8.3bn of export revenue since 2021

The 40.7% expansion in dairy exports translates into an \$8.3b increase in annual export revenue since 2021. No other goods sector came close to matching this dollar gain.

Dairy's revenue increase was also larger than the combined increase across the next nine largest goods export sectors, which together added about \$7b.

FIGURE 22: CHANGE IN GOODS EXPORTS, YEAR TO DECEMBER 2021 – 2025

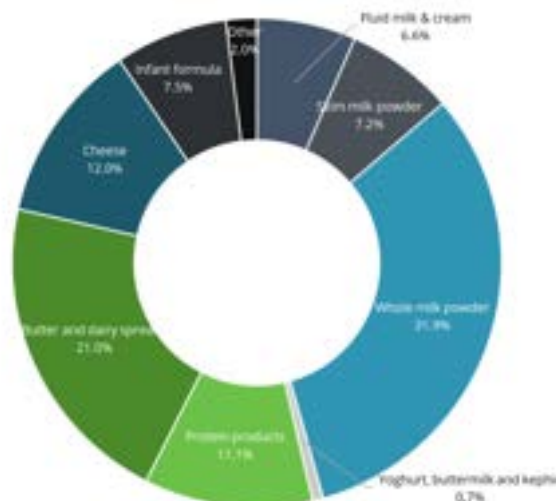


Source: Statistics New Zealand, Sense Partners

2.2. What we sell

The composition of dairy exports mix is becoming more diverse

FIGURE 23: EXPORTS BY PRODUCT GROUP, YEAR TO DECEMBER 2025



Source: Statistics New Zealand, Sense Partners

Whole milk powder remains the largest dairy export product, accounting for 31.9% of dairy export value in the year to December 2025. Its share has fallen from 40.7% in 2021 even though WMP export value has increased 10.2%, indicating a more diversified export mix.



The lower WMP share reflects faster growth in other product groups. Butter and dairy spreads led the increase, rising 110% since 2021, or \$3.2b, to reach \$6.1b in 2025. Their share of total dairy exports rose from 14.1% to 21.0%.

Several individual dairy products would be major export sectors on their own

Viewed separately, several dairy product groups are large enough to rank as major export industries:

- Butter and dairy spreads generated \$6.1b of exports, making them the second-largest dairy product group after whole milk powder. Their export value exceeded wood at \$5.1b, wine at \$2.6b, and seafood at \$2.0b.
- Cheese exports reached \$3.5b in 2025, up \$1.3b from 2021. That was growth of 63.9%, the second-fastest increase after butter and dairy spreads.
- Protein products generated \$3.2b of exports, more than engines and machinery (\$2.6b), precious metals (\$2.1b), aluminium (\$1.8b), and electrical machinery (\$1.7b).
- Infant formula, skim milk powder, and fluid milk and cream each generated about \$2b of export revenue in 2025.

TABLE 1: DAIRY EXPORTS BY PRODUCT GROUP, YEAR TO DECEMBER 2025

Dairy product group	Export share (2025)	Export revenue (2025)	Growth (2021-2025)
Whole milk powder	31.9%	\$9.2B	10.2%
Butter and dairy spreads	21.0%	\$6.1B	110.0%
Cheese	12.0%	\$3.5B	63.9%
Protein products	11.1%	\$3.2B	34.3%
Infant formula	7.5%	\$2.1B	56.9%
Skim milk powder	7.2%	\$2.1B	37.2%
Fluid milk & cream	6.6%	\$1.9B	53.8%
Other	2.0%	\$0.6B	24.2%
Yoghurt, buttermilk and kephir	0.7%	\$0.2B	17.7%
Total	100.0%	\$28.8B	40.7%

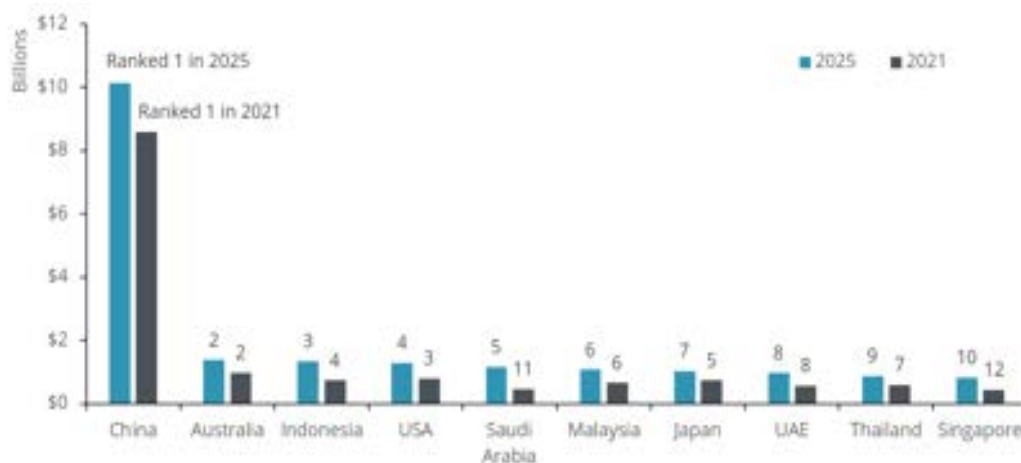
Source: Statistics New Zealand, Sense Partners



2.3. Who we sell to

China remains the largest source of growth, but gains have broadened

FIGURE 24: TOP 10 DAIRY EXPORT MARKETS, YEAR TO DECEMBER 2025



Source: Statistics New Zealand, Sense Partners

Among markets with more than \$100m of dairy exports in 2025, the fastest growth rates from 2021 to 2025 were recorded in the UK, up 3,389% to \$151.5m; the Netherlands, up 416.3% to \$415m; Algeria, up 150.9% to \$679.6m; Saudi Arabia, up 148.2% to \$1.2b; and Peru, up 110.2% to \$169.8m. A further 17 markets grew by more than 20%.

China delivered the largest dollar increase, with exports up \$1.5b, or 17.9%, between 2021 and 2025. Saudi Arabia added \$692.6m and Indonesia \$599.2m. The USA (\$486.2m), Algeria (\$408.7m), Australia (\$403.2m), and Malaysia (\$402.6m) each added more than \$400m.

Another 15 markets grew by more than \$200m, and four more by more than \$100m. Dairy exports to the EU more than doubled to \$615.6m, a 121.1% increase.

Some markets contracted sharply. Exports to Russia fell 88.1% to \$15.4m after exporters responded to sanctions over Russia's invasion of Ukraine. Other markets with declines above \$20m included Germany, down 76.9% to \$21.4m; Chile, down 58.9% to \$45.2m; Myanmar, down 92.4% to \$4.3m; Cuba, down 100% to nil; and Brazil, down 84.3% to \$4.5m.

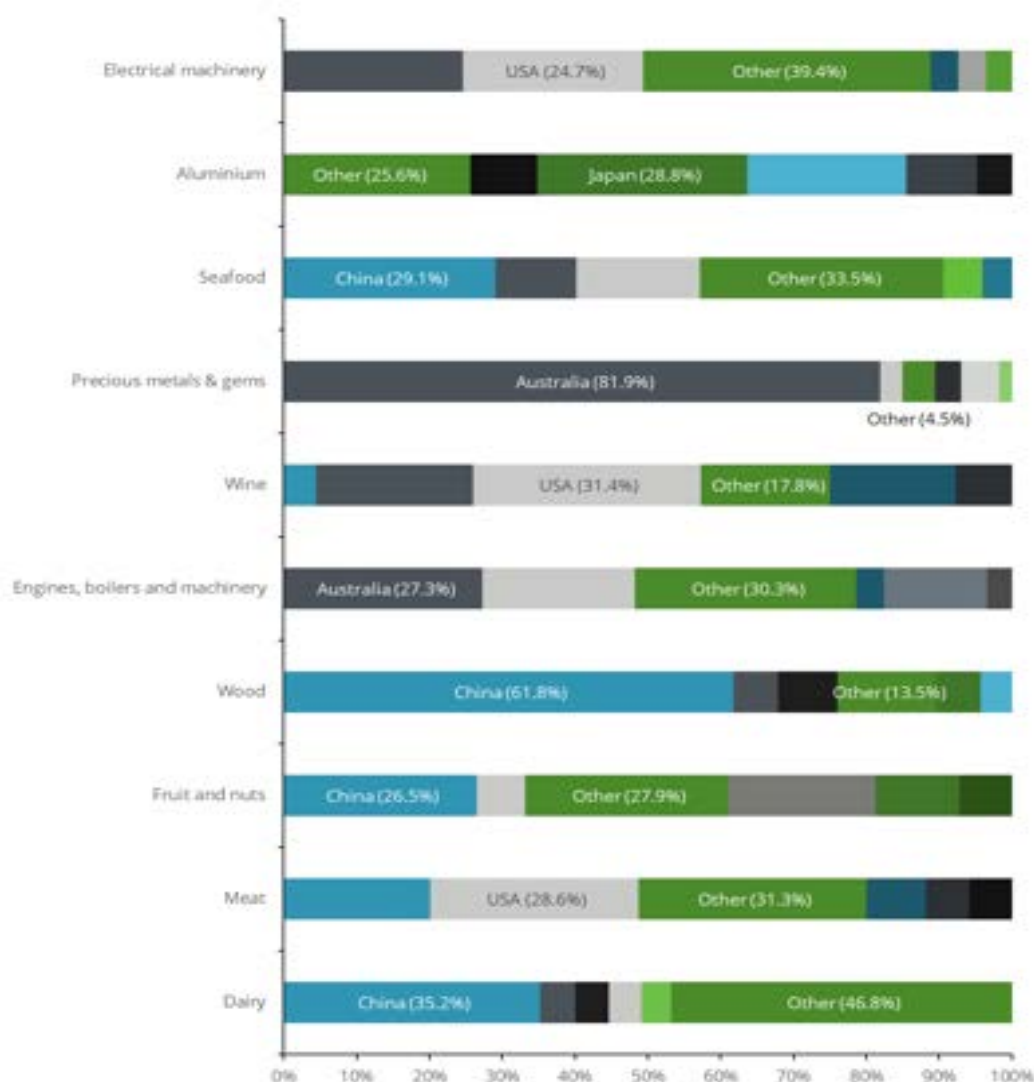
Contrary to popular belief, dairy has a quite diverse customer base

The top five dairy markets account for 53.2% of exports. That is the lowest concentration among New Zealand's top 10 goods export sectors.

By comparison, the top-five shares are 95.5% for precious metals, 86.5% for wood, 82.2% for wine, 74.4% for aluminium, 72.1% for fruit and nuts, 69.7% for engines, boilers and machinery, 68.7% for meat, 66.5% for seafood, and 60.6% for electrical machinery.



FIGURE 25: SHARE OF EXPORTS BY DESTINATION, YEAR TO DECEMBER 2025



Source: Statistics New Zealand, Sense Partners

New Zealand dairy products are sold into 149 markets. Only engines, boilers, and machinery (180 markets) and electrical machinery (171 markets) sold into more destinations among the top 10 goods export sectors. Wine reached 117 markets, seafood 112, meat 107, aluminium 101, wood 84, fruit and nuts 79, and precious metals 73.



2.4. Trends in dairy exports

Real dairy exports continue to lift, not just nominal values

Figure 26 reports export revenue per kilogram of milk solids produced in New Zealand. In nominal terms, revenue per kilogram rose 63.5% from \$8.92 in 2018 to \$14.58 in 2025.

After adjusting for inflation using Statistics New Zealand's Dairy Cattle Farming PPI, the real value still rose 18.3%, from \$7.85 to \$9.29 per kilogram. The 2025 value is 20.8% above the long-run average of \$7.69.

FIGURE 26: EXPORT REVENUE PER KG MILK SOLIDS PRODUCED, YEAR TO DECEMBER

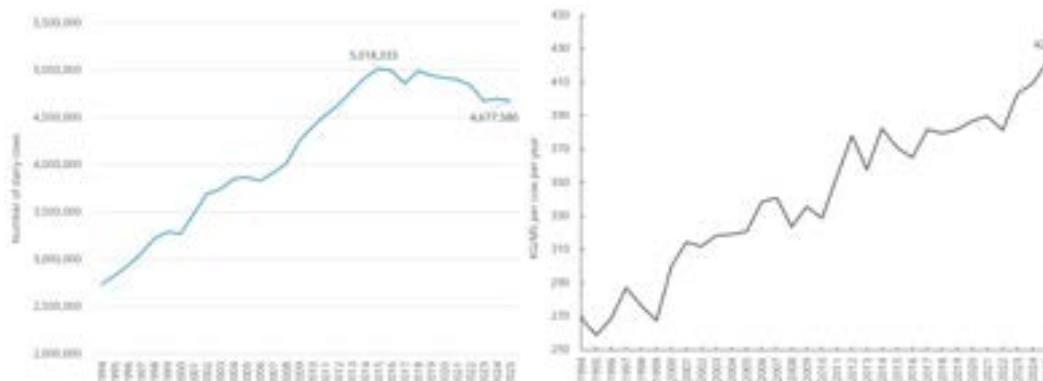


Source: DCANZ, Statistics New Zealand, Sense Partners

Milk-solids per cow have increased by 14% over the past decade

The national dairy herd peaked in 2015 at just over 5m cows and has since fallen 6.8% to 4.7m in 2025. At the same time, milk solids per cow have continued to rise, increasing by a compounding average of 1.3% a year to reach 422kg per cow in 2025.

FIGURE 27: NATIONAL HERD SIZE AND MILK SOLIDS (KG) PER COW PER YEAR

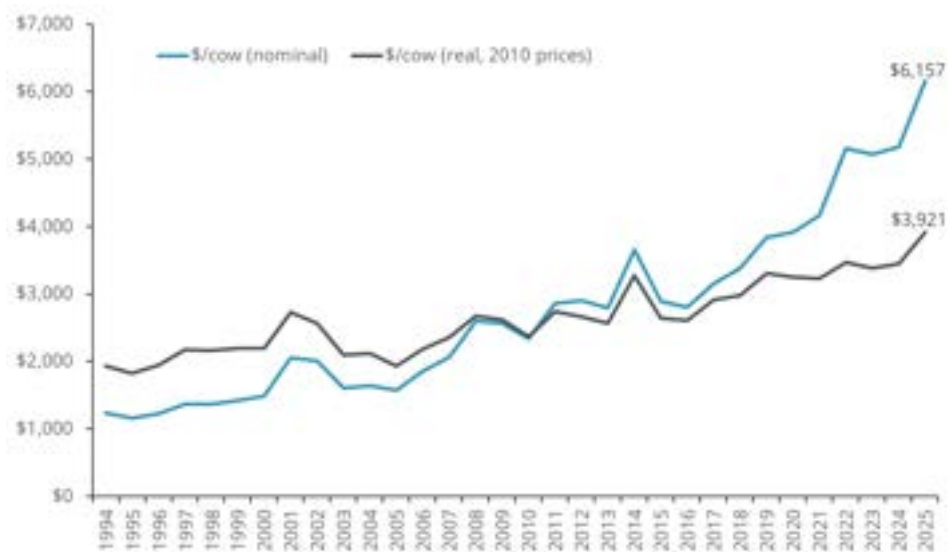


Source: Dairy NZ, Statistics New Zealand, Sense Partners

This has lifted export value per cow (Figure 28). Since 2015, nominal exports per cow have risen 112.7% to \$6,157. In real terms, export value per cow increased 48.1% to \$3,921 in 2025.



FIGURE 28: EXPORT REVENUE PER COW, YEAR TO DECEMBER



Source: DCANZ, Statistics New Zealand, Sense Partners



3. Resilience

3.1. Despite global turmoil, dairy keeps on spending

Dairy is exposed to global commodity cycles

Between January 2013 and March 2026, the dairy price index had a standard deviation equal to 19% of its average. That illustrates the scale of price volatility facing the sector.

FIGURE 29: DAIRY PRICE INDEX AND DAIRY SECTOR PURCHASES AND OPEX



Source: FAO, Statistics New Zealand, Sense Partners

Purchases have been steadier, helping absorb shocks

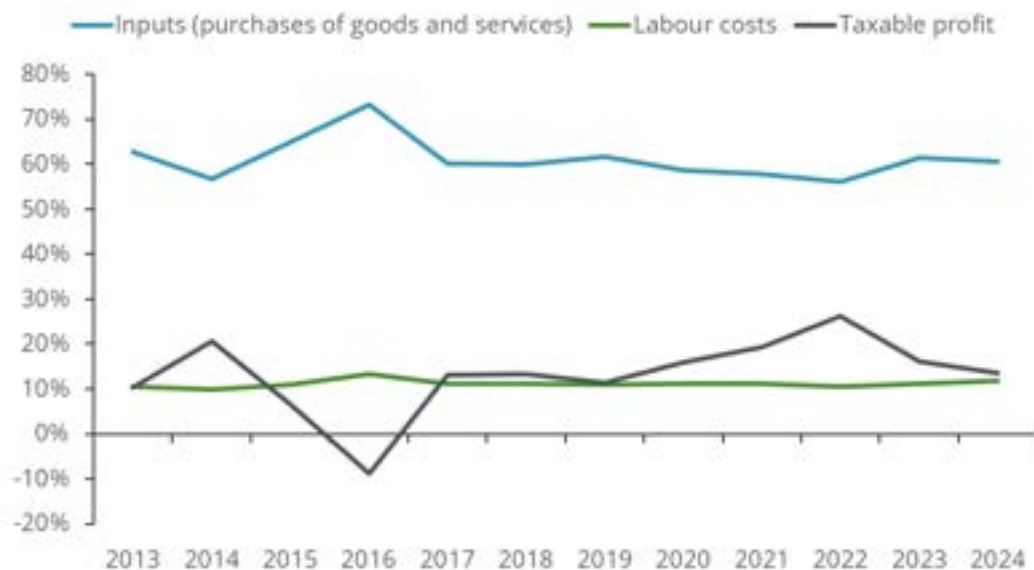
Price volatility has not translated one-for-one into volatility in dairy sector spending in local communities. Between 2013 and 2024 (latest data available), dairy purchases and operating expenses were more stable, with a standard deviation of 14.2%.

Sharp price falls still affect the sector, but farms must continue operating through the cycle. That sustains jobs and local spending. For example, dairy purchases rebounded quickly after the price falls of 2014-2016 and 2022-2023 and continued increasing thereafter.

Figure 30 shows how dairy revenue is allocated between input purchases, labour costs, and taxable profit. Labour's share has been relatively stable, averaging 11.2% of revenue. Strong years tend to lift input spending, while downturns fall more heavily on taxable profit. In effect, farmers absorb much of the commodity price shock while maintaining spending in regional economies.



FIGURE 30: USE OF REVENUE – DAIRY FARMING SECTOR (SHARE OF SALES)



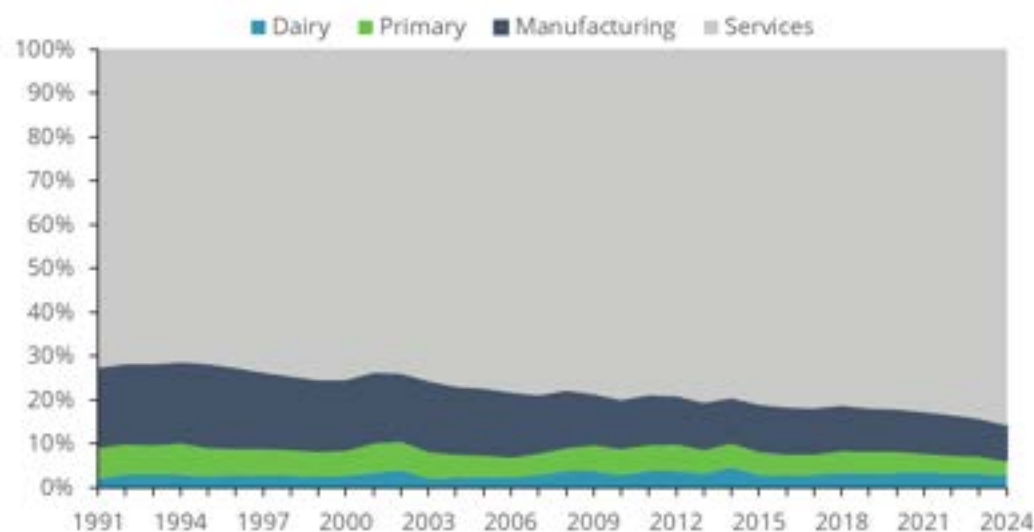
Source: Statistics New Zealand, Sense Partners

The New Zealand economy changes over time, but dairy is an ever-present foundation

Over the long run, New Zealand's economy has shifted toward services. Manufacturing's share of GDP fell from 18.1% in 1991 to 7.9% in the year to March 2024, while services increased from 72.7% to 85.8%. The primary sector fell from 9.2% to 6.3%. Dairy moved the other way, rising from 2.2% to 2.8% of GDP.

That reflects New Zealand's comparative advantage in dairy, the sector's ability to grow export revenue, and its role in sustaining high-wage jobs across regional economies.

FIGURE 31: SHARE OF GDP BY SECTOR, YEAR TO MARCH



Source: Statistics New Zealand, Sense Partners



Appendices

Estimated dairy GDP by region

TABLE 2: DAIRY GDP BY REGION

Region	Dairy GDP	Share of Regional GDP
Auckland	\$935.5 M	0.6%
Bay of Plenty	\$531.8 M	2.2%
Canterbury	\$1,966.6 M	3.7%
Gisborne	\$18.8 M	0.6%
Hawke's Bay	\$124.1 M	1.0%
Manawatu-Wanganui	\$700.8 M	4.3%
Marlborough	\$46.2 M	1.1%
Northland	\$489.4 M	4.4%
Otago	\$635.8 M	3.4%
Southland	\$955.4 M	10.6%
Taranaki	\$912.7 M	8.3%
Tasman/Nelson	\$102.5 M	1.3%
Waikato	\$2,807.0 M	7.8%
Wellington	\$166.7 M	0.3%
West Coast	\$300.9 M	12.1%

Source: Statistics New Zealand, Sense Partners

Estimated dairy GDP by Territorial Authority

TABLE 3: ESTIMATED DAIRY GDP BY TERRITORIAL AUTHORITY

Territorial Authority	Dairy farming	Dairy processing	Total dairy
Ashburton District	\$398.9 M	\$3.4 M	\$402.3 M
Auckland	\$64.5 M	\$483.3 M	\$547.8 M
Buller District	\$67.2 M	\$0.0 M	\$67.2 M
Carterton District	\$31.7 M	\$0.0 M	\$31.7 M
Central Hawke's Bay District	\$42.7 M	\$0.0 M	\$42.7 M
Central Otago District	\$23.1 M	\$0.0 M	\$23.1 M
Christchurch City	\$63.4 M	\$196.6 M	\$259.9 M
Clutha District	\$165.6 M	\$76.5 M	\$242.1 M
Dunedin City	\$41.4 M	\$1.7 M	\$43.1 M
Far North District	\$85.3 M	\$8.5 M	\$93.8 M
Gisborne District	\$5.7 M	\$6.0 M	\$11.8 M
Gore District	\$71.9 M	\$26.7 M	\$98.6 M



TURNING REGIONAL PRODUCTION INTO NATIONAL INCOME DAIRY'S ECONOMIC CONTRIBUTION TO NEW ZEALAND

Territorial Authority	Dairy farming	Dairy processing	Total dairy
Grey District	\$43.8 M	\$0.0 M	\$43.8 M
Hamilton City	\$28.9 M	\$248.2 M	\$277.1 M
Hastings District	\$13.9 M	\$14.3 M	\$28.2 M
Hauraki District	\$151.9 M	\$15.5 M	\$167.4 M
Horowhenua District	\$99.9 M	\$0.0 M	\$99.9 M
Hurunui District	\$93.9 M	\$1.7 M	\$95.6 M
Invercargill City	\$91.7 M	\$53.4 M	\$145.2 M
Kaikoura District	\$10.6 M	\$0.0 M	\$10.6 M
Kaipara District	\$118.9 M	\$39.6 M	\$158.5 M
Kapiti Coast District	\$13.2 M	\$3.4 M	\$16.5 M
Kawerau District	\$0.0 M	\$15.5 M	\$15.5 M
Lower Hutt City	\$1.6 M	\$8.4 M	\$10.0 M
Mackenzie District	\$19.9 M	\$0.0 M	\$19.9 M
Manawatu District	\$139.3 M	\$0.0 M	\$139.3 M
Marlborough District	\$21.1 M	\$2.8 M	\$23.9 M
Masterton District	\$25.1 M	\$0.8 M	\$25.9 M
Matamata-Piako District	\$379.8 M	\$324.3 M	\$704.2 M
Napier City	\$0.0 M	\$1.7 M	\$1.7 M
Nelson City	\$3.7 M	\$1.8 M	\$5.6 M
New Plymouth District	\$129.5 M	\$4.2 M	\$133.7 M
Opotiki District	\$27.9 M	\$0.0 M	\$27.9 M
Otorohanga District	\$170.2 M	\$0.0 M	\$170.2 M
Palmerston North City	\$34.2 M	\$131.3 M	\$165.5 M
Porirua City	\$0.0 M	\$0.0 M	\$0.0 M
Queenstown-Lakes District	\$13.4 M	\$5.9 M	\$19.3 M
Rangitikei District	\$52.6 M	\$0.0 M	\$52.6 M
Rotorua District	\$200.0 M	\$1.7 M	\$201.7 M
Ruapehu District	\$13.1 M	\$0.0 M	\$13.1 M
Selwyn District	\$234.7 M	\$323.0 M	\$557.6 M
South Taranaki District	\$421.8 M	\$503.0 M	\$924.8 M
South Waikato District	\$209.7 M	\$115.6 M	\$325.3 M
South Wairarapa District	\$44.9 M	\$0.8 M	\$45.7 M
Southland District	\$533.0 M	\$222.2 M	\$755.2 M
Stratford District	\$69.3 M	\$1.7 M	\$71.0 M
Taranua District	\$115.7 M	\$72.7 M	\$188.3 M
Tasman District	\$65.1 M	\$44.7 M	\$109.8 M
Taupo District	\$243.1 M	\$62.0 M	\$305.1 M
Tauranga City	\$13.2 M	\$4.2 M	\$17.5 M
Thames-Coromandel District	\$22.8 M	\$3.4 M	\$26.2 M



Territorial Authority	Dairy farming	Dairy processing	Total dairy
Timaru District	\$150.2 M	\$278.0 M	\$428.2 M
Upper Hutt City	\$0.0 M	\$0.0 M	\$0.0 M
Waikato District	\$282.6 M	\$121.3 M	\$403.9 M
Waimakariri District	\$122.0 M	\$2.5 M	\$124.6 M
Waimate District	\$126.7 M	\$112.3 M	\$239.1 M
Waipa District	\$255.2 M	\$183.3 M	\$438.6 M
Wairoa District	\$2.6 M	\$0.0 M	\$2.6 M
Waitaki District	\$147.8 M	\$39.3 M	\$187.2 M
Waitomo District	\$57.7 M	\$0.0 M	\$57.7 M
Wellington City	\$0.0 M	\$5.0 M	\$5.0 M
Western Bay of Plenty District	\$79.4 M	\$1.7 M	\$81.1 M
Westland District	\$67.2 M	\$145.3 M	\$212.5 M
Whakatane District	\$120.6 M	\$101.7 M	\$222.3 M
Whanganui District	\$26.3 M	\$11.2 M	\$37.5 M
Whangarei District	\$115.8 M	\$110.4 M	\$226.2 M

Source: Statistics New Zealand, Sense Partners

Dairy jobs by region

TABLE 4: DAIRY JOBS BY REGION (EXCLUDING SELF-EMPLOYED)

Region	Dairy farming	Dairy processing	Total dairy
Auckland Region	280	1,750	2,030
Bay of Plenty Region	1,150	450	1,600
Canterbury Region	5,300	3,350	8,650
Gisborne Region	21	25	46
Hawke's Bay Region	310	30	340
Manawatu-Whanganui Region	1,950	800	2,750
Marlborough Region	65	9	74
Nelson Region	20	6	26
Northland Region	1,150	580	1,730
Otago Region	1,500	480	1,980
Southland Region	2,900	1,150	4,050
Taranaki Region	1,950	1,850	3,800
Tasman Region	250	160	410
Waikato Region	6,500	4,100	10,600
Wellington Region	440	25	465
West Coast Region	640	510	1,150

Source: Statistics New Zealand, Sense Partners



TURNING REGIONAL PRODUCTION INTO NATIONAL INCOME DAIRY'S ECONOMIC CONTRIBUTION TO NEW ZEALAND



Dairy jobs by Territorial Authority

TABLE 5: DAIRY JOBS BY TERRITORIAL AUTHORITY (EXCLUDING SELF-EMPLOYED)

Territorial Authority	Dairy farming	Dairy processing	Total dairy
Ashburton District	1,750	15	1,765
Auckland	280	1,750	2,030
Buller District	240	0	240
Carterton District	120	0	120
Central Hawke's Bay District	190	0	190
Central Otago District	90	0	90
Chatham Islands Territory	0	0	0
Christchurch City	260	750	1,010
Clutha District	690	290	980
Dunedin City	180	45	225
Far North District	320	30	350
Gisborne District	21	25	46
Gore District	300	100	400
Grey District	160	0	160
Hamilton City	120	1,050	1,170
Hastings District	95	30	125
Hauraki District	500	55	555
Horowhenua District	390	0	390
Hurunui District	400	6	406
Invercargill City	440	210	650
Kaikoura District	50	0	50
Kaipara District	420	150	570
Kapiti Coast District	45	12	57
Kawerau District	0	50	50
Lower Hutt City	6	0	6
Mackenzie District	95	0	95
Manawatu District	580	0	580
Marlborough District	65	9	74
Masterton District	100	3	103
Matamata-Piako District	1,300	1,250	2,550
Napier City	6	0	6
Nelson City	20	6	26
New Plymouth District	420	9	429
Opotiki District	150	0	150



TURNING REGIONAL PRODUCTION INTO NATIONAL INCOME DAIRY'S ECONOMIC CONTRIBUTION TO NEW ZEALAND

Territorial Authority	Dairy farming	Dairy processing	Total dairy
Otorohanga District	590	0	590
Palmerston North City	130	490	620
Porirua City	0	0	0
Queenstown-Lakes District	60	25	85
Rangitikei District	190	0	190
Rotorua District	680	6	686
Ruapehu District	60	0	60
Selwyn District	990	1,150	2,140
South Taranaki District	1,300	1,850	3,150
South Waikato District	730	440	1,170
South Wairarapa District	170	3	173
Southland District	2,150	820	2,970
Stratford District	240	3	243
Tararua District	460	270	730
Tasman District	250	160	410
Taupo District	770	230	1,000
Tauranga City	45	12	57
Thames-Coromandel District	85	15	100
Timaru District	700	1,050	1,750
Upper Hutt City	0	0	0
Waikato District	930	440	1,370
Waimakariri District	440	6	446
Waimate District	560	410	970
Waipa District	910	670	1,580
Wairoa District	15	0	15
Waitaki District	580	130	710
Waitomo District	200	0	200
Wellington City	0	6	6
Western Bay of Plenty District	290	3	293
Westland District	240	510	750
Whakatane District	440	380	820
Whanganui District	140	40	180
Whangarei District	390	400	790

Source: Statistics New Zealand, Sense Partners



Dairy wages by region

TABLE 6. DAIRY WAGES BY REGION

Region	Dairy farming	Dairy processing	Total dairy	Dairy share of total wages
Auckland Region	\$16.7 M	\$285.2 M	\$301.9 M	0.5%
Bay of Plenty Region	\$65.0 M	\$75.5 M	\$140.5 M	1.4%
Canterbury Region	\$328.0 M	\$553.7 M	\$881.6 M	3.9%
Gisborne Region	\$1.5 M	\$3.0 M	\$4.6 M	0.3%
Hawke's Bay Region	\$18.6 M	\$10.1 M	\$28.6 M	0.5%
Manawatu-Whanganui Region	\$114.5 M	\$129.2 M	\$243.7 M	3.2%
Marlborough Region	\$5.0 M	\$1.5 M	\$6.5 M	0.4%
Nelson Region	\$1.1 M	\$1.0 M	\$2.1 M	0.2%
Northland Region	\$65.0 M	\$94.0 M	\$158.9 M	3.1%
Otago Region	\$92.8 M	\$72.1 M	\$165.0 M	2.0%
Southland Region	\$173.3 M	\$176.2 M	\$349.4 M	10.8%
Taranaki Region	\$129.9 M	\$302.0 M	\$431.9 M	11.1%
Tasman Region	\$14.2 M	\$26.8 M	\$41.1 M	2.5%
Waikato Region	\$396.0 M	\$645.9 M	\$1041.9 M	6.3%
Wellington Region	\$27.2 M	\$10.9 M	\$38.1 M	0.2%
West Coast Region	\$37.7 M	\$87.2 M	\$125.0 M	12.7%

Source: Statistics New Zealand, Sense Partners



Dairy wages by Territorial Authority

TABLE 7: DAIRY WAGES BY TERRITORIAL AUTHORITY

Territorial Authority	Dairy farming	Dairy processing	Total dairy	Dairy share of total wages
Ashburton District	\$105.5 M	\$2.0 M	\$107.5 M	10.5%
Auckland	\$16.8 M	\$285.9 M	\$302.6 M	0.5%
Buller District	\$14.3 M	\$0.0 M	\$14.3 M	5.5%
Carterton District	\$7.4 M	\$0.0 M	\$7.4 M	2.5%
Central Hawke's Bay District	\$12.4 M	\$0.0 M	\$12.4 M	2.6%
Central Otago District	\$5.9 M	\$0.0 M	\$5.9 M	0.6%
Chatham Islands Territory	\$0.0 M	\$0.0 M	\$0.0 M	0.0%
Christchurch City	\$16.8 M	\$117.7 M	\$134.5 M	0.9%
Clutha District	\$42.2 M	\$45.4 M	\$87.6 M	17.3%
Dunedin City	\$10.5 M	\$1.0 M	\$11.6 M	0.3%
Far North District	\$17.4 M	\$5.0 M	\$22.4 M	1.3%
Gisborne District	\$1.6 M	\$3.0 M	\$4.6 M	0.3%
Gore District	\$18.0 M	\$16.0 M	\$34.0 M	9.3%
Grey District	\$9.3 M	\$0.0 M	\$9.3 M	2.2%
Hamilton City	\$5.9 M	\$148.0 M	\$153.9 M	2.7%
Hastings District	\$4.0 M	\$8.4 M	\$12.4 M	0.4%
Hauraki District	\$31.0 M	\$9.2 M	\$40.3 M	8.1%
Horowhenua District	\$23.6 M	\$0.0 M	\$23.6 M	2.7%
Hurunui District	\$24.8 M	\$1.0 M	\$25.8 M	7.1%
Invercargill City	\$23.0 M	\$32.0 M	\$54.9 M	2.9%
Kaikoura District	\$2.8 M	\$0.0 M	\$2.8 M	3.7%
Kaipara District	\$24.2 M	\$23.5 M	\$47.7 M	8.5%
Kapiti Coast District	\$3.1 M	\$2.0 M	\$5.1 M	0.3%
Kawerau District	\$0.0 M	\$9.2 M	\$9.2 M	6.3%
Lower Hutt City	\$0.4 M	\$5.0 M	\$5.4 M	0.1%
Mackenzie District	\$5.3 M	\$0.0 M	\$5.3 M	3.4%
Manawatu District	\$32.9 M	\$0.0 M	\$32.9 M	2.2%
Marlborough District	\$5.0 M	\$1.5 M	\$6.5 M	0.4%
Masterton District	\$5.9 M	\$0.5 M	\$6.4 M	0.9%
Matamata-Piako District	\$77.5 M	\$193.4 M	\$270.9 M	24.4%
Napier City	\$0.0 M	\$1.0 M	\$1.0 M	0.1%
Nelson City	\$1.1 M	\$1.0 M	\$2.1 M	0.2%
New Plymouth District	\$26.7 M	\$2.5 M	\$29.2 M	1.0%
Opotiki District	\$5.9 M	\$0.0 M	\$5.9 M	3.4%
Otorohanga District	\$34.7 M	\$0.0 M	\$34.7 M	12.9%
Palmerston North City	\$8.1 M	\$79.0 M	\$87.1 M	3.4%
Porirua City	\$0.0 M	\$0.0 M	\$0.0 M	0.0%



TURNING REGIONAL PRODUCTION INTO NATIONAL INCOME DAIRY'S ECONOMIC CONTRIBUTION TO NEW ZEALAND

Queenstown-Lakes District	\$3.4 M	\$3.5 M	\$6.9 M	0.4%
Rangitikei District	\$12.4 M	\$0.0 M	\$12.4 M	2.7%
Rotorua District	\$42.2 M	\$1.0 M	\$43.2 M	1.9%
Ruapehu District	\$3.1 M	\$0.0 M	\$3.1 M	0.9%
Selwyn District	\$62.0 M	\$193.4 M	\$255.4 M	8.9%
South Taranaki District	\$86.9 M	\$302.7 M	\$389.5 M	47.6%
South Waikato District	\$42.8 M	\$68.9 M	\$111.8 M	14.4%
South Wairarapa District	\$10.5 M	\$0.5 M	\$11.1 M	2.8%
Southland District	\$133.4 M	\$132.8 M	\$266.2 M	26.9%
Stratford District	\$14.3 M	\$1.0 M	\$15.3 M	6.7%
Tararua District	\$27.3 M	\$43.7 M	\$71.0 M	12.9%
Tasman District	\$14.3 M	\$26.9 M	\$41.2 M	2.5%
Taupo District	\$49.6 M	\$37.0 M	\$86.6 M	7.2%
Tauranga City	\$2.8 M	\$2.5 M	\$5.3 M	0.1%
Thames-Coromandel District	\$4.7 M	\$2.0 M	\$6.7 M	1.1%
Timaru District	\$39.7 M	\$166.5 M	\$206.2 M	12.5%
Upper Hutt City	\$0.0 M	\$0.0 M	\$0.0 M	0.0%
Waikato District	\$57.7 M	\$72.3 M	\$130.0 M	3.5%
Waimakariri District	\$32.3 M	\$1.5 M	\$33.8 M	1.6%
Waimate District	\$33.5 M	\$67.3 M	\$100.8 M	48.9%
Waipa District	\$52.1 M	\$109.3 M	\$161.4 M	7.2%
Wairoa District	\$0.7 M	\$0.0 M	\$0.7 M	0.3%
Waitaki District	\$39.1 M	\$23.5 M	\$62.6 M	8.9%
Waitomo District	\$11.8 M	\$0.0 M	\$11.8 M	4.9%
Wellington City	\$0.0 M	\$3.0 M	\$3.0 M	0.0%
Western Bay of Plenty District	\$16.8 M	\$1.0 M	\$17.8 M	0.9%
Westland District	\$14.3 M	\$87.4 M	\$101.7 M	34.0%
Whakatane District	\$25.4 M	\$60.5 M	\$86.0 M	7.7%
Whanganui District	\$6.2 M	\$6.7 M	\$12.9 M	1.0%
Whangarei District	\$23.6 M	\$65.6 M	\$89.2 M	3.2%

Source: Statistics New Zealand, Sense Partners



TURNING REGIONAL PRODUCTION INTO NATIONAL INCOME DAIRY'S EC
ZEALAND

