

Top 10 priorities 2024

While it was not unexpected that “world-class biosecurity” has maintained its position as the top priority for leaders in this year’s survey, there were plenty of other surprises as we analysed the results.

Given the number of issues shaping the operating environment for organisations across the food and fibre sector, it is not surprising that leaders are focused on a wide range of top-of-mind issues.

What did surprise us was that the overall priority score given in the survey fell 2.3% compared to 2023. Fatigue has been a common theme in recent Agendas and it is possible that the challenges to bandwidth within organisations has led industry leaders to curate their areas of focus in line with their organisational priorities.

Of demographic groups analysed, all but one follow the overall downward trend in priority scores. Having recorded a 16% increase in overall priority score in 2023, the millennial cohort is the only group with an increase in 2024, continuing to place greater priority on some of the

technological shifts that are occurring across the sector. The boomer cohort shows the biggest reduction in the priority score (down 4% on last year) with the female and executive cohorts also showing larger reductions. These were the cohorts with the highest priority scores in 2023 and the greatest enthusiasm for a change agenda. Such a reversal could suggest that a year on, we have reached a point where the reality of handling so much change is weighing on the majority of industry leaders, even those with aspirations to accelerate a step change in activity across the industry.

Average score given to a priority	Overall	Male	Female	Millennial	Gen-X	Boomer	Executive	Governor
Average Priority Score 2023	7.29	7.11	7.52	7.22	7.22	7.45	7.41	7.10
Average Priority Score 2024	7.12	7.02	7.24	7.28	7.02	7.15	7.13	7.09
Movement	(0.17)	(0.09)	(0.28)	0.06	(0.20)	(0.30)	(0.28)	(0.01)

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Five of the items in the Top 10 are ranked higher than they were last year, three have held their ranking, while two items are ranked lower. There are two new priorities in the Top 10.

Ranking “act on the results of gene editing discussions” second (above perennial runner up, “completion of high-quality trade agreements”) was a significant surprise. This priority jumped into the Top 10 last year as knowledge about the potential benefits of gene editing technologies became more widespread. However, the conversation has mainstreamed this year and the clear message of this result is that this is an issue we should resolve and act on sooner rather than later.

Both new entries to the Top 10 are making a return after a one-year absence. The highest ranked entry relates to building water storage infrastructure (ranked 7th), both to support growth and to deliver greater resilience to the environment and the sector. However, as with 2023, the topic of water was not reflected in the roundtable conversations where it was a top-of-mind issue for only a few contributors. The other return to the Top 10 was “develop resilient supply chains”, which has again become a key operational priority as organisations deal with the disruption caused by droughts in Panama, conflict in the Gulf and accidents including the recent incident in Baltimore harbour.

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Action	Rank		Priority	
	2024	2023	2024	2023
World-class biosecurity	1	1	9.16	9.06
Act on results of gene editing discussions	2	6	8.19	8.03
Sign high quality trade agreements	3	2	8.14	8.42
Invest in resilient rural infrastructure	=4	7	8.00	8.00
Broadband equality for all	=4	=4	8.00	8.06
Public/ private mission science partnerships	6	8	7.99	7.79
Build water storage to manage resources	7	16	7.89	7.61
Develop resilient supply chains	8	12	7.83	7.69
Maximising sustainable use of oceans	9	9	7.69	7.75
Maintain immigration settings	10	3	7.67	8.13


Priorities that have fallen out of the Top 10	Rank		Priority	
	2024	2023	2024	2023
Telling engaging provenance stories	=11	10	7.58	7.74
Objective assessment of tree planting	19	=4	7.28	8.06

With the country unlocked from the pandemic and labour shortages persisting, it was no surprise last year that prioritising immigration settings was a high priority for industry leaders. This item has seen its priority score fall by 5.7% on last year but has retained its position in the Top 10. While the extreme labour pressures of 2021 and 2022 have eased, major people issues continue to face the sector and this was reflected in the top-of-mind issues highlighted by leaders during the roundtables. People development remains a key priority for the Emerging Leaders, who continue to prioritise the industry investing in growing its own talent over relying on short term solutions such as migration.

To create space in the Top 10 for the new entries, two priorities have fallen out. “Telling engaging provenance stories” has slipped one place to equal 11th – something of a surprise given how many leaders commented on the need for their organisation and the industry as a whole to get better at communicating the attributes inherent within their products as a core element of a modern provenance story.

The decline in the ranking for “objective assessment of tree planting” was more significant (down 15 places with a 9.7% score reduction). Last year, leaders had significant concern about productive land being converted to carbon forestry without any checks or balances. The Labour Government did place restrictions on land

conversion, and it is not surprising to see this priority fall. While over the past year there has been a greater focus on ensuring the right trees are planted in the right places, in recent months concerns have started to emerge about the conversion of productive land to solar farms. Although this issue seems to be localised to regions with good connectivity to the national electricity distribution grid, it is one to watch.


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A wing and a prayer?

World-class biosecurity is again the highest priority for industry leaders. The priority score has increased to 9.16, the highest since 2021. The issue was raised in many of the roundtables. While great progress has been made in eliminating *Mycoplasma Bovis*, and the devastation that PSA inflicted on kiwifruit is becoming a distant memory, the likely arrival of avian influenza has brought preparedness for a major incursion into sharp focus.

What we heard

- The establishment of avian influenza as endemic throughout the Americas and its spread into Antarctica means it is almost certain the disease will arrive in New Zealand. We are exposed as the disease will arrive via migratory wild birds, bypassing border control. Its jump in the US into cattle herds and humans creates the risk that its impact could extend beyond native wildlife and more of our productive capacity than just the poultry-based sectors.
- In addition to the increased risk of incursion, contributors noted that in the aftermath of Cyclone Gabrielle a range of new disease issues appear to have arisen. These are potentially sleeper diseases that have been triggered by the consequences of the cyclone.
- We heard about the importance of getting modern biomaterials across the border to maintain competitiveness, and the challenges importers are facing. While new facilities are opening

later in the year to increase capacity, the increased prices being charged to recover the costs associated with providing these services are forcing some importers to assess whether they remain in the industry.

- These challenges come at a time when the focus on cost control, in government and industry, is intense. We heard that MPI's budget cuts are not impacting frontline biosecurity capability and investment is being maintained to support the industry on the ground. We also heard that the threats we face mean traditional response preparations and plans are unlikely to be sufficient as the nature of incursions changes.

This year's Agenda

- The nature of the biosecurity risks we face is changing faster than we are evolving our ability to respond. As incursions become less likely to follow traditional vectors and arrive via a port or airport, the capabilities needed to identify an incursion and respond must evolve to

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- Our biosecurity system needs to target the biggest risks we face. Previous Agendas have noted the importance of a comprehensive risk assessment focused beyond our borders, to identify risks that present the greatest threat to the industry. This was highlighted again this year, but it was also noted that this needs to be balanced with an ability to rely on the controls of trusted partner countries to accelerate our access to biomaterials and innovations that could drive industry growth.
- While the Government can enable an incursion response, they will not have all the solutions or pay for all the actions. Given current exposures and our inability to contain them at the border, it is critical that each organisation focuses on doing the things they can do in their business well. In responding to Covid-19, it was the small things like washing hands and wearing masks that did the most to protect us from infection. With the threats we face, it will be good farm management practices and hygiene standards that will offer the most protection.
- We should not waste the learnings from the crises we have recently dealt with, and ensure we have fit for purpose emergency response plans. Regardless



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of whether we are hit by a biosecurity incursion, a cyclone or another unexpected event, we need to be certain that everybody is clear on the plan and understands their role, to expedite response and accelerate transition to recovery. A fit for purpose plan is not a framework, but a detailed plan which makes it clear precisely what is expected when an event hits. Every organisation should have one.