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**PROPOSED BIOSECURITY SCIENCE, RESEARCH AND TECHNOLOGY STRATEGY FOR
NEW ZEALAND**

Please find attached the submission of the Meat Industry Association on Biosecurity New Zealand's Discussion Paper, *A Biosecurity Science, Research and Technology Strategy for New Zealand*.

If you have any queries regarding our submission, please contact:

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Yours sincerely



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Meat Industry Association of New Zealand (Inc)

Submission to Biosecurity New Zealand on

A Draft Biosecurity Science, Research and Technology Strategy for New Zealand

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Meat Industry Association Submission on a Draft Biosecurity Science, Research and Technology Strategy for New Zealand

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I: Introduction

1. The Meat Industry Association of New Zealand Incorporated ('MIA') is a voluntary trade association representing New Zealand meat processors, marketers and exporters. It is an Incorporated Society (owned by members) that represents companies supplying virtually all of New Zealand sheepmeat exports and all beef exports, producing 17 per cent of our nation's exports by value (30 percent of New Zealand's primary sector export revenue). The New Zealand meat industry earned \$5 billion in export revenue in the year ended May 2006 and \$1.22 billion from domestic meat sales in the year ended March 2006.
2. MIA member companies operate approximately 80 processing plants dispersed throughout the country. The plants slaughter and process approximately 24 million lambs, 4.4 million sheep and 4.2 million cattle and calves each year. Ninety percent of this production is processed into value-added products. Approximately 800,000 tonnes or 85% of the production is exported to overseas destinations. Our affiliate members add to the depth of expertise available from the membership, with representation throughout the meat supply chain, including road and rail transport, shipping lines, ports, packaging firms, specialist product exporters, research and technology.
3. The Association advocates on behalf of its members and provides advice on economic, trade policy, market access, employment relations, business compliance costs and technical and regulatory issues facing the industry, with a particular focus on:
 - Food safety trends and developments in importing countries
 - Economic and trade aspects of market access to key overseas markets
 - Major public policy proposals that could impact on industry operations
4. The MIA is also the interface between the meat industry and government (i.e., it is the consultative body referred to in various New Zealand statutes, such as the Meat Board Act 2004 and the Animal Products Act 1999).
5. The Association's mission is to:
 - Provide a forum for consideration of industry-wide commercial, human resource, marketing, and sanitary and zoosanitary issues; and
 - Provide the means of formulating a collective view on issues of industry-wide interest, and of conveying that position to government, departments of state, trade bodies, and other appropriate external agencies and organisations.
6. A list of Association members is attached as Appendix 1.

Background to this Submission

7. This submission is made by the MIA in response to Biosecurity New Zealand ('BNZ') Discussion Paper No. 2006/05: *A Biosecurity Science, Research and Technology Strategy for New Zealand* ('the

Discussion Paper'). The submission is modelled on the specific questions posed in the questionnaire developed by BNZ and the Ministry for Research, Science and Technology, and in developing the submission all MIA members and affiliate members were consulted and asked for input. Individual members may also make submissions specific to the views of their operations.

II: Summary

8. Overall, the MIA is supportive of the strategy outlined in the Discussion Paper, provided that the responsibility and accountability for pursuing identified actions is both clearly allocated and willingly assumed.
9. The MIA does not agree with aspects of the proposed funding responsibilities outlined in the Discussion Paper, particularly with regard to funding of biosecurity science into surveillance programmes and diagnostics that underpin New Zealand's international pest and disease reporting obligations. We contend that the Crown, and not industry, should meet this cost as the benefits of surveillance for this purpose is so diffuse.
10. We also suggest it is too simplistic to propose that industry should pay for biosecurity science that relates to production diseases, as it understates the potential for the impacts of many diseases to be felt far beyond the industries involved in production.
11. The MIA supports many of the priorities for action identified in the Discussion Paper, improving international collaboration on biosecurity sciences, and improving the visibility of biosecurity science to improve uptake. However, the MIA submits that greater priority under the strategy should be given to:
 - the development of surveillance and diagnostic tools for underpinning New Zealand's international pest and disease freedom reporting;
 - furthering understanding of the potential for feral animals to disperse serious pests and diseases.

III: The '25 Year Vision for Biosecurity Science'

Does [the '25 Year Vision for Biosecurity Science'] reflect your vision for biosecurity science?

12. It is difficult to argue against the simple vision of "Advancing our Biosecurity System through excellence in science, to better protect New Zealand". It is almost a truism that any science strategy will aim to use 'excellence in science' to advance the activity to which the strategy applies.
13. If anything, then, we suggest that the vision understates the complexity and importance of the issue. It would seem to us that effective collaboration and co-ordination will be paramount in ensuring that 'excellence in science' is achieved, and that the resulting science outcomes do ultimately 'better

protect New Zealand' in a practical sense. We suggest, then, that effective collaboration and co-ordination should form an express part of the long-term vision for biosecurity science.

IV: The Current State of Biosecurity Science

Does [the 'Current State' section of the Discussion Paper] accurately reflect the current state of biosecurity science, research and technology in New Zealand? If not, what is missing or should be changed?

14. The MIA's understanding of the current state of biosecurity science aligns with that set out in the section 3 of the Discussion Paper. In particular, we agree that:
- capacity depth within New Zealand is shallow in some areas – often limited to the personal expertise of one or two people;
 - the bulk of biosecurity science is funded by central government – although industry and regional government do make significant cash and in-kind contributions;
 - there often appears to be a lack of co-ordination or strategy in approaching operational biosecurity science and at times operational research can appear to be an *ad hoc* response to a public/media issue rather than part of a comprehensive and planned programme of research.
15. We would note, though, that in some instances there already is a good level of co-ordination between and among various industries and research providers – although again such approaches are usually a response to a specific issues rather than being part of an overall strategic direction.

Are there other challenges that need to be addressed?

16. On the whole, the MIA considers that the challenges set out in pages 13 and 14 of the Discussion Paper fairly reflect the key challenges for biosecurity science system over the next 25 years. We agree, for example, that there is a need to robustly and transparently identify and prioritise biosecurity research; and to continue to shift the emphasis of research towards providing a 'fence at the top of the cliff', rather than an ambulance at the bottom.
17. One challenge that perhaps does not come through in the Discussion paper is that of balancing economic values against social, cultural and environmental values. Assuming one has good modelling tools, one can attribute a dollar value to the economic benefits of following a particular strand of research and compare this to the dollar value of the economic benefits of pursuing a different line of research. It is more difficult, however, to directly compare the quantified economic benefits of a one proposal against the less-tangible social and cultural benefits of an alternative proposal.

18. Given the relatively small pool of resources available to commit to biosecurity research, there will come a time when potential projects will compete for priority (and therefore access to available funding). In such circumstances, equitable treatment of the diverse range of interests biosecurity science should protect will be as much a challenge to the effective co-ordination of biosecurity science as the challenge (identified in the Discussion Paper) of balancing the resourcing of 'immediate and longer term' biosecurity research needs.
19. As discussed below, we do not see that the allocation of funding responsibilities to the Crown and industry etc. will provide the answer to this challenge.

V: The Future State of Biosecurity Science

Does [the 'Future State' section of the Discussion Document] reflect how you would like to see biosecurity science, research and technology over the next 25 years? If not, what is missing or should be changed?

20. Again, the MIA agrees with the broad proposed future state of the New Zealand biosecurity science system as one in which the focus is on identifying and acting on priorities; co-operation; capacity-building; prevention (rather than cure); and outcomes that can be, and are, implanted.
21. We also recognise the importance of understanding human behaviour with regard to biosecurity in terms of developing programmes to influence that behaviour, and as such agree that behavioural science disciplines have a greater role to play in the future of biosecurity science.
22. One aspect the MIA considers is missing from future state of the biosecurity science system proposed in the Discussion Paper is that the direction for biosecurity science should also aim to maintain and improve the credibility and robustness of New Zealand's pest and disease freedom status, protecting New Zealand's market advantage as an exporter of quality products. New Zealand's enviable claims to freedom from many serious pests and diseases provide economic advantages that flow throughout the economy. Ensuring New Zealand remains well-positioned to defend these claims as the science of detection and diagnosis evolves internationally is, therefore, a matter of far-reaching significance for the country as a whole.

VI: Minimum Funding Roles

Do the minimum funding roles described [on page 24 of the Discussion Document] align with your understanding of funding roles and responsibilities?

23. The MIA disagrees with the general proposition that research into surveillance activities is primarily an industry responsibility. We accept that in some instances the circumstances surrounding a pest or

disease (e.g., the range and significance of its actual or potential impact) may be such that it is appropriate for industry to lead research into surveillance for that pest or disease. However, we cannot accept a general assumption that responsibility for improving surveillance programmes should automatically fall to industry simply because the pest or disease at issue impacts upon production. Our reasons for this are twofold.

24. Firstly, surveillance for many pests and disease is undertaken to verify assurances of animal health status made by the New Zealand government to the international standard setting organisation for animal health and zoonoses - the OIE. As New Zealand is required to make these statements to allow it to trade under the WTO framework, surveillance for those diseases that determine its animal health status is undertaken to ensure New Zealand can participate in an international rules-based trading community rather than to advance to interest of any particular industry or industries. The MIA argues that this gives such surveillance a public benefit character, and responsibility for funding and improving the necessary surveillance programmes should accordingly fall to the Crown.
25. Secondly, while a particular export industry may draw a benefit from a surveillance programme targeting a specific pest/disease (or set of pests/diseases), it must also be recognised that surveillance programmes are required to mitigate the potential adverse affects of risk goods entering New Zealand. In other words, the need for surveillance will commonly arise as a consequence of activities over which the affected industry has little or no control – for example, to combat the potential for tourists to introduce and spread pests and diseases.
26. In short, we consider that exacerbaters to contribute to costs as a consequence of activities they undertake. In saying this, we note that funding reviews undertaken by BNZ have suggested that recovering costs from exacerbaters – such as the tourism industry in particular – is inequitable as such exacerbaters are arguably not in a position to mitigate the level of risk they generate. It has also been suggested that targeting arriving passengers, for example, is unfair as the majority of passengers do not bring risk items into New Zealand.
27. The MIA seriously questions the credibility of these arguments. Taking the first argument around equity and potential to mitigate risk, however poorly an exacerbator may feel it is placed to mitigate the risks associated with activities it undertakes, that exacerbator will almost certainly be better placed to manage the potential consequences of its activities than the domestic industry its activities jeopardise. Turning to the argument around the proportion of individuals that actually introduce a risk, we would argue that the issue is not about the number of interceptions, but is about the risk a particular activity poses. For example, there will be many instances where the importers of fresh produce will pay to have an individual consignment of goods treated when that particular consignment does not harbour any pests. The issue is the risk associated with an activity, not with each individual instance of an activity being undertaken.
28. If it is considered inequitable or impracticable to allocate funding responsibilities to exacerbaters, it is also inequitable for industry's affected by exacerbaters' activities to bear the consequential costs of those activities. If the Crown determines that one side of the equation not contribute to these consequential costs, then the Crown should meet these costs rather than seek to pass the entire load to affected industries.

29. In summary, the MIA submits that care needs to be taken to fully consider the circumstances giving rise to a need for surveillance before assigning responsibility for funding the science needed to improve it. We find it concerning, therefore, that the minimum funding roles proposed on page 24 of the Discussion Paper suggest that surveillance-related research should primarily fall to industry alone.

VII: Prioritisation

Do you have any comments on the proposed biosecurity science system or how this should work?

30. The MIA supports the suggestion that the groups tasked with identification of biosecurity science priorities should also have a responsibility for ensuring that science outcomes are ultimately implemented. We see this dual role as strengthening the importance of practical relevance in the assessment of biosecurity science proposals.
31. One reservation we have with this dual role, however, is that the desire to see results being implemented could impact negatively on the priorities attributed to longer-term, 'blue skies' or multi-staged science proposals. A balance needs to be struck between getting runs on the board, and building a platform for further research.

VIII: Measuring Performance

Do you have any comment on indicators, reporting or how best to measure the performance of the Biosecurity Science, Research and Technology Strategy?

32. The MIA endorses the need for progress on the strategy to be regularly measured against meaningful and objective performance indicators.
33. The MIA suggests that reporting against the Action Plan in the appendix to the Discussion Paper provides a useful starting point for measuring performance. Reporting on the progress made in the action areas identified as the highest priority over the next 1-2 years and/or the next 3-5 years, including reasons for any lack of progress in any areas (e.g., diversion of resources due to an incursion) and specific examples of uptake of science, would provide a rough snapshot of progress.
34. Some qualitative indicators would also be required to meaningfully measure the benefits of improvements in areas such as collaboration, co-ordination, and cross-discipline interaction. One option for measuring progress here may be to survey stakeholders to test movement in such factors

against the baseline 'Current State' described in the Discussion Paper – again encouraging those surveyed to provide tangible examples that support their views.

IX: Actions

Do the action areas and key actions in Goal 1 provide adequate direction for biosecurity science? Are there any gaps? Are there any actions or action areas that should not be identified in the strategy?

Objective 1.1

35. We note a key action on page 33 of the Discussion Paper is to 'identify emerging pests and diseases both nationally and internationally and analyse the potential associated biosecurity risks'. This action is intended as one step in assisting our ability to forecast and develop contingencies for, emerging biosecurity risks.
36. We suggest that a further action related to this would be to monitor international attitudes towards known pests and diseases to forecast potential threats to New Zealand's continued export trade. Biosecurity science has an important role to play in countering attitudes that may have more of a political than a technical basis, as it enables New Zealand to be on the front foot when responding to those attitudes. To minimise the risk to trade, such issues should be identified early so that, where appropriate, 'anticipatory' science can be commissioned to protect New Zealand's interests.
37. The MIA supports the need to better understand the potential natural pathways for spread of pest and diseases (key action 2 on page 36 of the Discussion Paper) – particularly in relation to the potential for feral animals to disperse significant diseases (such as foot-and-mouth disease).
38. The MIA also strongly supports the need for development and improvement of diagnostic tools for surveillance and incursion response (key action 2 on page 38 of the Discussion Paper). The credibility of New Zealand's disease-freedom status (see paragraph 24 above) must be maintained if New Zealand exporters are to remain internationally competitive, and to ensure this credibility is preserved, New Zealand needs world-class identification and diagnostic tools.
39. Development of diagnostic tools is tightly intertwined with the development of cost-effective surveillance technologies for monitoring New Zealand's pest and disease status (key action 2 on page 41 of the Discussion Paper), and accordingly the MIA supports this key action also.
40. For similar reasons to those set out in paragraph 38, we would also support the development of inspection and detection tools that test compliance of exports with the biosecurity requirements of our trading partners (key action 2 on page 39 of the Discussion Paper).
41. The MIA sees that the development of alternatives to mass slaughter when faced with a major livestock disease incursion (key action 7 on page 42 of the Discussion Paper) as an important area for

potential research. We submit, however, that research into this area must do more than simply identify alternatives that are logistically workable. The acceptability of any such measures (e.g., vaccination as a containment measure for diseases such as foot-and-mouth disease) to our trading partners must also be considered. This may itself generate biosecurity science needs – for example demonstrating to our trading partners the extent to which animals that are treated as an alternative to slaughter do not pose a biosecurity or food safety risk (ideally with a view to allowing trade in the products from treated animals wherever if possible).

Objectives 1.2 and 1.3

42. The MIA considers the proposed mechanisms set out for developing biosecurity research priorities on an on-going basis to be appropriate, and in particular supports:
- The use of consultative groups and expert panels to advise on science priorities;
 - A stock-take of current biosecurity science needs;
 - The review of science needs as part of the de-brief exercise following an incursion response;

Will the action areas and actions in Goal 2 improve research delivery? Are there any gaps? Are there any actions or action areas that should not be identified in the strategy?

Objective 2.1

43. The third key action proposed on page 49 of the Discussion Paper proposes drawing further on behavioural and economic science for biosecurity purposes. In our view this is very positive. A better appreciation of human behaviour, for example, will add considerable depth to efforts to mobilise the wider public into playing a bigger part in biosecurity protection, and to encourage New Zealanders to incorporate some biosecurity disciplines into their everyday behaviours.
44. Making better use of economic science in biosecurity, on the other hand, will strengthen the rigour and credibility of decision-making processes, particularly in response situations where a variety of response options must be assessed.

Objective 2.2

45. We support the key actions relating to the further development of international links set out on page 52 of the Discussion Paper. Given our relatively limited resources, New Zealand must make the fullest use possible of linkages that allow us to leverage off science undertaken by (or in partnership with) countries or international groupings. A vast body of science is commissioned by the European Union, for example, and one of the most important strategic actions for New Zealand's biosecurity science programme should be to tap into this as much as possible. In our view, doing so is just as important as building capacity within New Zealand.

Will the actions and action areas in Goal 3 improve uptake of biosecurity science, research and technology? Are there any gaps? Are there any actions or action areas that should not be identified in the strategy?

46. The key actions proposed on pages 54 to 56 of the Discussion paper would seem to target key reasons why there may be a lack of operational uptake of biosecurity science (e.g., failure to allocate time to plan how science results may be incorporated into operations; practical barriers to uptake of science outputs; and insufficient profile of biosecurity science projects among the full range of potential end-users of that science).
47. On this basis, we would see that these key actions have the potential to improve uptake of biosecurity science. One further simple action that does not seem to be explicitly addressed would be ensuring that operational demands play a leading role in the setting of priorities for biosecurity science. Science driven as a response to an operational need would intuitively seem to have a greater chance of uptake.

X: Strategic Priority Actions

Do you [agree with] the top priority action areas and actions for Goal 1? If not, what would you exchange for what? Please provide your rationale for the suggestion using the prioritisation criteria on page 59.

48. We agree that increasing understanding of pathways for high-risk pest and diseases entering New Zealand is a priority under Action Areas 1.1.3 and 1.1.11. However, we would see that it is equally important to better understand the natural and human-mediated pathways for spread within New Zealand. In particular, we see a weakness in the understanding of the potential for feral animals to disperse pests and diseases as a big potential information gap in response decision-making, and one that needs to be addressed as a matter of priority.
49. While the MIA also agrees that development of cost-effective surveillance and early detection techniques is a priority for action area 1.1.8, the more immediate priority for the export meat industry is to develop cost-effective surveillance technologies that support New Zealand's international reporting of its pest and disease status. Each time an importing country's testing reveals a presence that conflicts with New Zealand reported pest and disease freedom, the credibility of the entire surveillance system supporting our statements for freedom comes into question. (See paragraphs 22, 24 and 38 above for further discussion)
50. Given the continued importance of agricultural commodities to the New Zealand economy, we have no option but to ensure this surveillance (and diagnostic) system is world-class and capable of withstanding international scrutiny. We would see that benchmarking New Zealand's surveillance and diagnostic capability against that of our trading partners, and continuing to seek improvements to that capability, is an immediate priority for action under the proposed biosecurity science strategy.

Do you [agree with] the top priority action areas and actions for Goal 2? If not, what would you exchange for what? Please provide your rationale for the suggestion using the prioritisation criteria on page 59.

51. As noted in paragraph 45 above the MIA supports making the maximum possible use of international linkages and science resources. We therefore agree with the priority actions suggested for action area 2.2.2.
52. The MIA also supports priority being afforded to development of processes that ensure that an appropriate balance is found between the funding of high priority short-term operational research and high priority longer-term strategic research. The very nature of biosecurity work is such that, without appropriate safeguards, resources can cluster around the immediacies of a response to the detriment of strategic work programmes. We consider that developing processes to avoid this reactive cycle is crucial.

Do you [agree with] the top priority action areas and actions for Goal 3? If not, what would you exchange for what? Please provide your rationale for the suggestion using the prioritisation criteria on page 59.

53. We agree with the top priorities identified for Goal 3, as improving the visibility of biosecurity science outcomes would seem to be a logical first step to take towards improving uptake and implementation of those outcomes. As noted in paragraph 47, we would also see that it is important to deliberately and actively incorporate operational perspectives in the setting of biosecurity science priorities as an important step to take in promoting uptake of biosecurity science.

XI: Funding Responsibilities

Are the funding responsibilities [set out on page 65 of the Discussion Paper] clear? Are there any gaps in either research activities or funding responsibilities?

54. The funding responsibilities set out on page 65 of the Discussion Paper are reasonably clear, but the MIA does not completely agree with them. The proposed minimum funding responsibilities are allocated along similar lines to the 2005 BNZ discussion paper, *Future Funding of Biosecurity Services* regarding cost-recovery for biosecurity services. While we agree that responsibility for funding of research into a particular area of activity should largely mirror responsibilities for funding the activity itself, we disagree with where it is proposed that these responsibilities should fall with regard to two activities – surveillance and incursion response/pest management.

55. The surveillance programmes required for 'export certification' will often be those surveillance programmes that underpin New Zealand's international reporting of pest and disease status. As discussed in paragraphs 23 to 29 above, the MIA strongly contends that such programmes should be funded by the Crown. In part this is because the issuing of these statements is required for New Zealand to be able to trade under the WTO framework. The benefits arising from this (i.e., the protection provided by WTO rules, the SPS Agreement, and the IPPC etc.) are generic and do not favour one industry over another.
56. What is more, only the Crown has the ability to influence the requirements of the WTO with regard to the surveillance New Zealand is required to undertake to establish its pest and disease status. Placing the responsibility for funding this activity on industry is inequitable given that the primary ability to influence costs and pursue efficiencies is held by the Crown.
57. The MIA also cautions against the simplistic proposal that primary industries should have the main responsibility for incursion response activities for production pests and diseases. In our view this is very much a question of degree. Certain pests and diseases will have effects that are not felt to any material extent beyond that sector, and in such cases it may be reasonable for the costs of response and/or pest management (including biosecurity science needs) to be borne by the affected industry.
58. However, the effects of some production pests and diseases will not be confined to specific sectors. In extreme cases, such as foot-and-mouth disease, the effects of production diseases will be felt far beyond the primary industries themselves. Where this is the case the responsibility for funding responses (including related biosecurity science needs) should be spread across from a wider range of sources – including potentially the Crown.

XII: Action Plan

The final strategy will need to ascribe responsibilities for implementation of actions to stakeholders. Which action areas or actions do you consider you or your organisation to be responsible for?

59. As a general observation, several of the questions posed in the Discussion Paper seek comment on whether identified actions will improve biosecurity science delivery, capacity and delivery. We agree that it is important to identify the right actions, and on the whole we agree that the Discussion Paper has done so. What will actually improve biosecurity science, however, is not simply the identification of action points, it is the assignment of responsibility for completing actions, and the acceptance of accountability for doing so. As a result, it is the answers to this question more than any other that will determine the probability of the biosecurity science strategy succeeding.
60. As an association representing the meat processing and exporting industry, the MIA would not see that it would have a primary responsibility for undertaking any of the identified actions. Rather, we would see our potential role under the strategy more as one of co-ordinating input into action areas from

across the export red meat industry. Particular areas where the MIA may be able to assist include the identification of biosecurity science priorities and the facilitation of uptake of biosecurity techniques and methods across the industry.

Do you have any comments or suggestions on the timing of focus and investment for the actions in Goal 1?

61. In line with the MIA's comments on top priorities in paragraphs 48 to 50, we submit over the next 1-2 years additional work should be undertaken in the following areas:
- 'Development of cost-effective surveillance technologies which enable New Zealand's pest and disease status to be monitored in line with national and international reporting requirements' (Action Area 1.1.8).
 - 'Increase understanding and characterisation of natural and human-mediated pathways through which damaging pests and diseases can spread within New Zealand' (Action Area 1.1.3).

Do you have any comments or suggestions on the timing of focus and investment for the actions in Goal 2?

62. For the reasons outlined in paragraph 52, the MIA submits that more resources should be contributed to the establishment of 'processes to move science resources to areas of higher priority with minimal disruption to longer-term strategic work' (Action Area 2.3.1) over the 3-5 year period, rather than waiting until the 6-10 year horizon as proposed in the Discussion Paper.

Do you have any comments or suggestions on the timing of focus and investment for the actions in Goal 3?

63. The MIA is comfortable with the proposed timing of investment for Goal 3 actions.

XIII: Contact Details

64. To discuss this submission further, please contact:

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Appendix 1: List of MIA Members – Year Commencing 1 July 2006

Members
Advance Marketing Ltd
AFFCO New Zealand Ltd
Alliance Group Ltd
ANZCO Foods Ltd
ANZCO Green Island Ltd (ANZCO group)
ANZPAC Foods Ltd
APJ Meats Ltd
Auckland Meat Processors Ltd
Ballande New Zealand Ltd
Bernard Matthews New Zealand Ltd
Blue Sky Meats (NZ) Ltd
<i>Brookland (NZ) Ltd (in receivership)</i>
Canterbury Meat Packers Ltd (ANZCO group)
CMP Rakaia
Columbia Exports Ltd
Crown Marketing Ltd (ANZCO group)
Crusader Meats New Zealand Ltd
Dairy Meats NZ Ltd (AFFCO group)
Davmet New Zealand Ltd
Fern Ridge Ltd
Frasertown Meat Company Ltd
Garra International Ltd
Glovers Foods Ltd
Greenlea Premier Meats Ltd
Harrier Exports Ltd
Horizon Meats New Zealand Ltd (wholly owned subsidiary of Blue Sky Meats (NZ) Ltd)
Hygrade Casings Company (wholly owned subsidiary of New Zealand By-Products)
Lamb Packers Feilding Ltd (wholly owned subsidiary of Bernard Matthews NZ Ltd)
Land Meat (NZ) Ltd (AFFCO group)
Lanexco Ltd
Lowe Corporation Ltd
Mathias International (Mathias Meats NZ Ltd)
New Zealand By-Products
Pilot (NZ) Ltd
PPCS Ltd
Progressive Gisborne Ltd (wholly owned subsidiary of Bernard Matthews NZ Ltd)
Progressive Meats Ltd
Riverlands Ltd (ANZCO group)
South Pacific Meats Ltd
South Pacific Meats - Malvern (AFFCO Group)
Tara Exports Ltd
Taylor Preston Ltd
Te Kuiti Meat Processors Ltd
Towers Thompson (New Zealand) Ltd
Universal Beef Packers Ltd (UBP)
Wallace Corporation Ltd

Affiliate Members
AgResearch-MIRINZ Centre
Aon New Zealand Limited
Axis Intermodal (Ports of Auckland Ltd)
Carter Holt Harvey, Packaging
CentrePort Wellington
Energy for Industry (ex Meridian Solutions)
Hamburg-Sud New Zealand Ltd
Hapag Lloyd (New Zealand) Ltd
Maersk New Zealand Ltd
Millers Mechanical NZ Ltd
Oceanic Navigation Ltd
Port of Napier
Port Otago Ltd
Port Taranaki Ltd (previously Westgate Transport Ltd)
ProAnd Ltd (Meatek Ltd)
Rissington Breedline Ltd
Sealed Air (New Zealand), Cryovac Division
Thompson Clarke Shipping Pty Ltd (ANZ Marketing Representative for the Port of Los Angeles)
Vero Marine Insurance