



Adjacent industries – nutritional and health products

SHAPING THE HEALTH OF OUR FUTURE

New Zealand's food story has long been one of purity, abundance and global export success, but the world is turning a page. Mandy Bell discusses how a new paradigm is emerging – food as medicine, farming as health care. Nations that integrate agriculture with human wellbeing are leading the future.



Criffel Station

New Zealand has the natural assets, trusted food systems and scientific excellence to seize this opportunity – but only if it moves beyond commodities and volume. The next step is to unlock adjacent high-value industries in nutrition, health and environmental services. This shift could add \$20–30 billion in prosperity beyond the Government’s doubling exports goal, ensuring farmers stay on the land while lifting the health of people and planet alike.

Environmental stewardship, healthy ageing, functional foods and precision nutrition represent both commercial potential and global responsibility. With scale on its side, New Zealand is small enough to experiment, nimble enough to pivot, and bold enough to lead.

The choice is clear: continue competing on bulk commodities or become the world’s health capital. The future of our land, communities and wellbeing depends on what we decide now.

Lessons from abroad – connected, collaborative, systemic

In recent travels from Singapore to Ireland to Europe, I was repeatedly reminded of the real shift in what’s happening in these markets, a new way of doing things; connected, collaborative, systemic. This is not the New Zealand way.

Officials within Europe are grappling with how to engineer food and farming futures through regulation and funding frameworks. In Ireland, scientists and entrepreneurs are finding common ground in ecosystem services thinking. This is in recognition that human, animal and ecosystem wellbeing are deeply intertwined. It is no different in Singapore, where the mix of mindset, ambition, trade policy and private investment

converge. This creates thriving innovation ecosystems where food, health and sustainability accelerate together.

I consistently heard a simple message: the integration of environmental resilience, traceability and health outcomes are central to the way food systems are valued. It was clear that something new is trying to break through globally – caught between the weight of the old and the uncertainty of the new – and it reminded me of home.

Criffel Futures – farming for the next 50 years

At Criffel Station in Central Otago, we began Criffel Futures to stretch beyond traditional farming. Deer remain an integral part of our story, but so too are nature-based solutions, ecosystem services, carbon accounting and agritech partnerships. We are asking ourselves – how do we farm for the next 50 years, not the last 50?

This isn’t an abstract question. Increasingly, it’s a practical, commercial and survival question. In Europe, ecosystem services are being embedded into subsidy frameworks. Carbon markets, biodiversity credits and water quality regulations are shaping farm viability. In Singapore, food sovereignty is being secured while health-focused exports

.....
Environmental stewardship, healthy ageing, functional foods and precision nutrition represent both commercial potential and global responsibility.
.....

True prosperity comes from switching products from commodity-based food exports to high-quality nutrition and health products.

grow. In Ireland, soil health, dairy innovation and microbiome science are explicitly linked to human health and resilience.

If we in New Zealand want to be relevant in the next 10 to 15 years, a few more dollars from commodities won't count. We are going to need to be a lot smarter. The start is to integrate our natural assets, science capability and agritech creativity into something that genuinely differentiates us – not just as food exporters, but as leaders in health.

The current government is targeting to double exports from the primary sector. This alone is not enough to shift New Zealand to the level of prosperity enjoyed by top countries in the OECD, and nor will it keep our farmers on the land. For this to happen we need to focus our attention on adjacent, high-value industries.

Adjacent industries – unlocking true prosperity

Analysis of base data from MPI's statement of the 'Situation and Outlook for Primary Industries 2025 (SOPI)' economic insights reinforces the upside of focus on these adjacent industries. We know that from 2015 to 2025 agri-food exports grew by over 60% value. This was achieved by following our instincts and the global trend in demand and pricing.

What the analysis tells us is that with this trend, two-thirds (or \$30 billion) of New Zealand's double food exports target is locked in without true effort or change, so it's business as usual. It also keeps this country competing with the global commodity suppliers.

True prosperity comes from switching products from commodity-based food exports to high-quality nutrition and health products – adjacent industries that leverage our existing food production base. The value of global food is on a path to keep growing by 3%-4% p.a. The global nutrition industries, such as personalised nutrition, fortified food and bio health, are on a path to increase in value by over 10%.

New Zealand does this now. Kiwifruit for gut health, Tautua for sophisticated ingredients, Fonterra for nutrition ingredients for the ageing population, Velvet for immune support and Zestt Wellness for plant bioactives that target pro-inflammatory pathways.

That shift has the potential to add an additional \$19–28 billion beyond the doubling scenario, significantly raising GDP per capita. The ambition, mindset, innovation and knowledge for this journey is what will keep our producers on the land, improve the environment and lift the quality of life of our communities.

Nutrition for living

The global food industry is worth US\$12 trillion, growing at 3%-4% per year.

The global health industry is worth US\$11 trillion, growing at 5% per annum.

The world needs more good food

Population is rising, people are earning more and people are moving to cities

Consumers face big challenges

This impacts more than 4 billion people. Farmland is degraded, food production productivity is in decline, climatic challenges, food is lost to weather events, people can't afford food, people don't eat good food, older people need special nutrition and poor diets contribute to more deaths

The world is confronting a new reality

Key markets needing our nutritious food have accelerated annual growth vs a global food value increase of 2%-4%

- Biotech markets growing at >20% per annum
- Global food and wellness sector growing at >11%
- Supplements, biofortification and specialised nutrition growing at 7%-12%
- Personalised nutrition growing at >18%
- Clinical nutrients, bio-stimulants and bio-nutrition growing at 7%-12%

The global picture is that the population will increase by another billion. However, in New Zealand's primary markets the population is decreasing; there will be more middle-income households, more people will be urban dwellers, and they will be older. It tells us that producing nutritional food for living will be harder in the environment. It highlights that the cost of healthcare will increase by trillions.

Nutrition and health – the global opportunity

By 2050, more than 3.2 billion people worldwide will be over the age of 50. The diseases of ageing (cardiovascular conditions, diabetes, dementia, arthritis, cancers) differ in symptom and management, but many share a common thread – chronic inflammation. Addressing that root cause will shift ageing from a story of decline to one of resilience and longevity.

The ageing of the world's population is not a crisis – it is an opportunity. If billions of people are looking for ways to live longer, healthier and more resilient lives, then there is an enormous market for products, services and systems that deliver that outcome. If New Zealand makes a choice to strongly support adjacent industries to our primary sector, that market could be ours.

This is not about adding years to life, but about adding life to years. It is about turning our natural strengths into global impact.

This is not just a healthcare challenge; it is a food and farming challenge. Nutrition is one of the most powerful levers we have to modulate inflammation, enhance immunity and improve quality of life. Functional foods, precision nutrition and lifestyle-integrated science could be as important to the 21st century as antibiotics were to the 20th.

.....

Functional foods, precision nutrition and lifestyle-integrated science could be as important to the 21st century as antibiotics were to the 20th.

.....

Environmental health – the foundation of trust

Environmental care is a critical part of ensuring nutrient dense food. In offshore conversations, New Zealand's environmental credentials are consistently recognised as a strength – from regenerative practices and biodiversity protection to water quality management. But admiration alone is not enough.

To fully realise the opportunity in high-value nutrition and health products, New Zealand must ensure three things:

- First, that all landowners lift their practices to the higher standard of care already achieved by leaders in the sector
- Second, that we tell the story of our environmental work and outcomes far better

- Third, that we inform markets with credible, transparent numbers that matter to consumers and trade partners.

These environmental commitments are not side issues, but central to economic strategy. High-quality nutrition and health products rely on provenance, integrity and trust – qualities inseparable from how we care for land, water, animals and ecosystems.

By embedding environmental stewardship (and the data to back it up) into the very fabric of our agri-food exports, New Zealand can differentiate itself in a crowded global market, command stronger premiums and align growth in GDP per capita with genuine improvements in planetary health. In doing so, our food story becomes more than exports alone – it becomes a blueprint for how a small nation can lead in both wellbeing and sustainability.

New Zealand as the health capital of the world?

Anna Campbell of Zestt Wellness recently put it bluntly: New Zealand could become the health capital of the world. It's audacious, but it makes sense. We have the raw ingredients:

- Natural assets – pristine water, fertile soils, unique flora and fauna
- High-quality food production – globally trusted for safety, traceability and purity
- Agritech know-how – from genetics to robotics, sensors to software
- Evidence-based science – a research community, which despite chronic underfunding still punches above its weight

Harnessing AI technology without losing wisdom

I have noted a tension evident on my recent travels – between technology and tradition, and between artificial intelligence (AI) and the human ability to sense, feel and know. AI will not replace farming or medicine, but it will transform them. In agriculture, AI is already analysing soil health, optimising irrigation, predicting pest outbreaks and guiding planting decisions.

In health, AI is helping identify early markers of disease, personalise nutrition plans and design new molecules for drug discovery. AI could be harnessed to make us more efficient at what we do now, and as a tool to support our raw ingredients and transform our agri-food sector at pace.

New Zealand could be positioned as the world's testbed for healthy ageing:

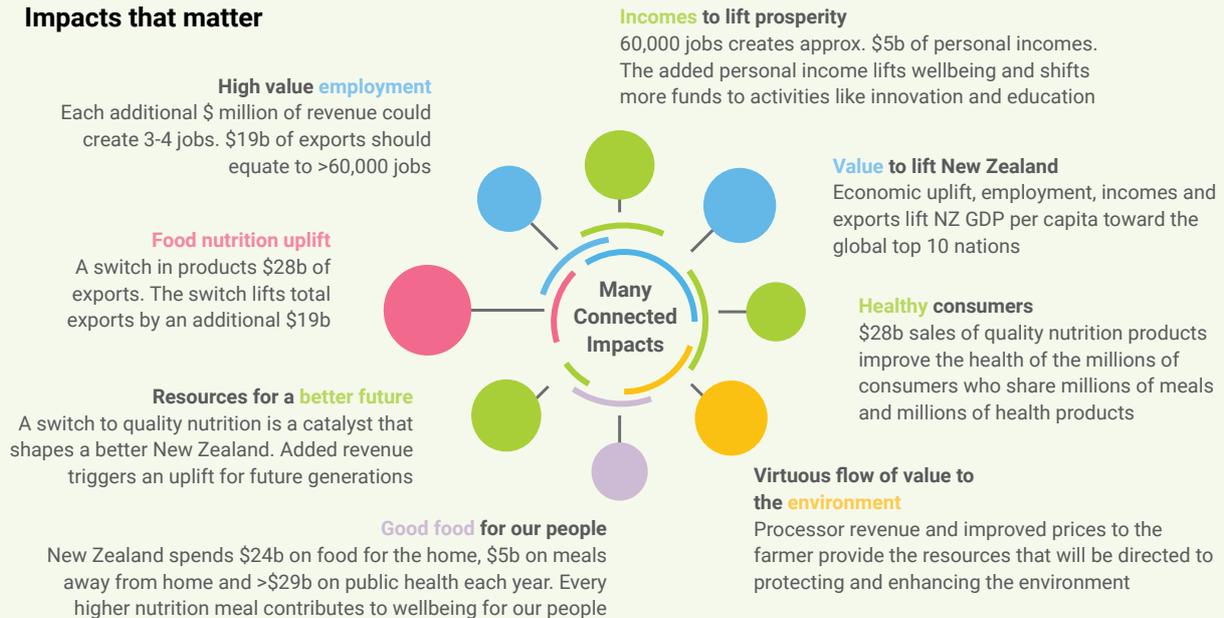
- Farms and entities producing functional foods tailored to anti-inflammatory diets
- Agritech companies integrating AI, sensors and genetics to personalise nutrition

.....

New Zealand could be positioned as the world's testbed for healthy ageing.

.....

**Future food > nutrition for living
Impacts that matter**



To take action, it will take many in this country with ambition to shift investment into R&D, innovation and capability.

- Health research that links lifestyle, diet and environment into preventive care models
- Rural communities that embody the principles of One Health and ecosystem services.

The building blocks already exist. What's missing is the will, the investment and the coordination.

Turning knowledge into action

I and many others care deeply about New Zealand – its land, flora, fauna and people. We care about the impact our food has on people. To take action, it will take many in this country with ambition to shift investment into R&D, innovation and capability to produce health food the world needs.

The Government must be a leader for action, with a focused strategy that runs across ministries and alongside us. Dr Keith Smith, an international innovation theorist who has worked with our government, notes that successful innovation policy must include organisational, marketing and business capabilities. Also, that innovation is system driven by a network of actors, not isolated businesses or technologies.

Acting means:

- Connecting strategies and execution across partnerships, research, farming and public health/medicine
- Embedding One Health and ecosystem services principles – recognising that human, animal and ecosystem health are inseparable
- Investing boldly in science and innovation, not timidly

- Building end-to-end agri-health value chains – from farm to formulation to finished product
- Making New Zealand a global testbed – trialing functional foods, preventive health models, AI-assisted agritech and regenerative farming systems
- Celebrating success and building global health companies in New Zealand.

The choice before us

Why is today different from many previous years of discussions on added value? Technology and AI are now enablers of scale and pace. Science is unlocking an understanding of the mechanisms of chronic inflammation and disease in humans.

Specifically, what is needed to get things moving? A boundary-spanning review of all entities working in primary sector adjacent industries. A central, connected entity that shapes and supports the opportunities, players and resources.

Looking into the future, I see a country that could be timid and incremental – or bold and transformative. We can choose to keep exporting bulk commodities and hoping for the best. Or we can choose to weave farming, food, science and health into a pathway for New Zealand as we shape the health of our future. The choice is ours.

Dr Mandy Bell is owner of Criffel Station in Central Otago region. Email: mandy@criffelstation.com