

From Disruption to Deliberate Resilience

What happens when one of our biggest customers leaves the room?

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Imagine waking up to a world where the United States is no longer an option for New Zealand food and fibre exports. Not just difficult, not just awkward – simply off the table. No beef, no butter, no wine containers heading for American ports. In a sector where the vast bulk of our goods exports are food and fibre, and where the US now sits as one of our top three destinations, that's not a blip, it's a body blow. It is also a textbook disruption: sudden, system-wide, and well outside the control of any individual farmer or processor.

Last month I wrote about why New Zealand farming's future lies in premium plates, not anonymous commodity: producing food with proof, story and integrity that earns its place at the top of the shelf. This month, I want to flip the lens: even if we get that premium game right, what happens if one of our biggest customers is suddenly no longer at the table – and what would it take to treat that kind of disruption not just as a hit, but as a turning point?

When the biggest guest leaves the room

Every global marketplace has one guest who dominates the room. When they're steady, the whole party feels safer. When they lurch from one mood to another, everyone else edges towards the walls. Lately, the US (but it could be anyone) has started to feel a bit like the guest at a party that is unpredictable and hard to read. The question for New Zealand farming is not whether we like that guest, but how much of our future we're prepared to pin on their moods.

For beef, dairy and wine especially, the US is a critical customer, buying a significant share of what we produce. When that kind of customer catches a cold or starts throwing trade tariffs around as a tool of "statecraft", our farmers and processors start sneezing whether they like it or not. Geopolitics, climate and technology are now combining to make disruption less of an occasional shock and more of the operating environment for trade-dependent countries like ours.

A world with the US door shut

So, what happens if that US door doesn't just wobble, but slams shut?

First, we would feel it very directly in farmgate returns across beef, dairy and wine, as product is hurriedly re-routed into already competitive markets like China, Australia, Japan and the wider Asia-Pacific. Prices would come under pressure as we jostle with other exporters doing the same thing.

Second, our national books would feel the strain. Food and fibre exports underpin a large slice of our GDP and losing a top-tier partner would leave a noticeable hole that would have to be filled somewhere else. That kind of shock doesn't just affect farmers, it ripples through contractors, rural services, regional towns, and ultimately tax revenue for hospitals and schools.

“Disruption at the border becomes disruption in the shearing shed, the meat plant, the small-town main street and the government balance sheet.”

From shock to deliberate resilience

But shocks also force choices we've been putting off. An abrupt disconnection from the US or another major trading partner could push us to accelerate three shifts that are already quietly under way, and that line up with the premium, proof-driven direction we talked about in January. It could also push us to grow from a mindset of “just coping” to something more ambitious: deliberate resilience.

In a world where geopolitical disruption, climate extremes and supply-chain shocks are routine, resilience can't just mean hanging on until things go back to normal. It must be deliberate. Choosing product mixes, markets and business models that not only survive disruption, but use it to move us into a stronger position.

The three shifts in our sector are, in many ways, the nuts and bolts of that deliberate resilience:

- More value from closer neighbours: We would likely double down on high-value niches in Asia, Australia and the Pacific, tailoring products and stories much more precisely to regional consumers rather than assuming one size fits a global supermarket shelf. These neighbours are not asking for anonymous bulk either; they are asking for safe, trusted, often premium food, and we can design offerings specifically for them.
- Shorter, smarter supply webs: Investment in traceability, data, and “origin plus story” branding would become non-negotiable, as we differentiate in markets where we are not the only premium option. The same proof and provenance that earn premiums also build resilience when markets move, because they make it easier to redirect product quickly, maintain trust, and command attention even in crowded shelves.
- Stronger domestic and regional demand: We might finally have the uncomfortable but important conversation about how much of our best produce should be available and affordable at home, and how we build resilient domestic processing and distribution alongside export growth. A stronger home and regional base acts as a buffer when

global channels wobble and as a platform for innovation, new products and new business models.

Deliberate resilience, in other words, is what happens when we treat disruption as a design brief, not a surprise.

Disruption as a chance to lead

This still leaves a harder, more human question. How far are we prepared to shape our livelihoods around a partner whose behaviour we can't predict? This isn't about left or right politics; it's about the reality that US trade policy is now openly used as a lever in wider geopolitical struggles, with agriculture right in the firing line. If the US is that unpredictable guest – sometimes generous, sometimes knocking over the furniture – New Zealand has three broad options.

We can keep hoping tonight will be one of the good nights. We can quietly spend more time talking to other guests, so that if they storm out, we're not left standing alone. Or we can decide that part of growing up as a trading nation is learning to stand a bit further away from the biggest mood in the room, and to become a trend setter in how a small food nation navigates disruption.

For all our vulnerability, we also have form when it comes to disruption. From electric fencing and gold kiwifruit to today's smart collars, agritech tools and high-value specialty foods, New Zealand has repeatedly turned constraint into world-first innovation in food and fibre. The next wave of disruption, around climate, technology, consumer preferences and geopolitics, is another chance to set the trend rather than wait for it.

“Premium plates, backed by proof and story, are not just about better margins; they are our playbook for disruption – products and relationships that are differentiated enough to move when markets move, and trusted enough to be first picked up when the dust settles.”

Choosing who we want to be

Food and fibre already underpin much of our export story, and they are forecast to keep growing. That gives us both a vulnerability and a power: what we choose to grow, how we choose to sell it, and who we choose to depend on will shape not just farm incomes but New Zealand's place in the world.

If the US gate ever does swing shut, it won't be the end of our story. It will be a moment of truth about who we are as a food-producing nation: agile or anchored, diversified or dependent, willing to ride out someone else's hangovers or confident enough to find a steadier table. Just as we are shifting from commodity to premium, we now need to shift from dependence to deliberate resilience: and from being disrupted by others to setting

the trend in how a small, export-reliant nation feeds the world.

That is a practical question for every farmer, grower and rural business that has ever watched the market reports and wondered, quietly, how much control we really have over our own future. Deliberate resilience asks us to answer that question with our paddock plans, our investment choices and our trade relationships – and to see disruption not only as a risk to survive, but as a chance to lead.

Join the conversation

E Tipu: New Zealand's Future Food and Fibre Summit
May 21–22, Te Pae, Christchurch
