



# The Future of NZ Inc: Realising New Zealand's competitive advantage in Agritech by 2050

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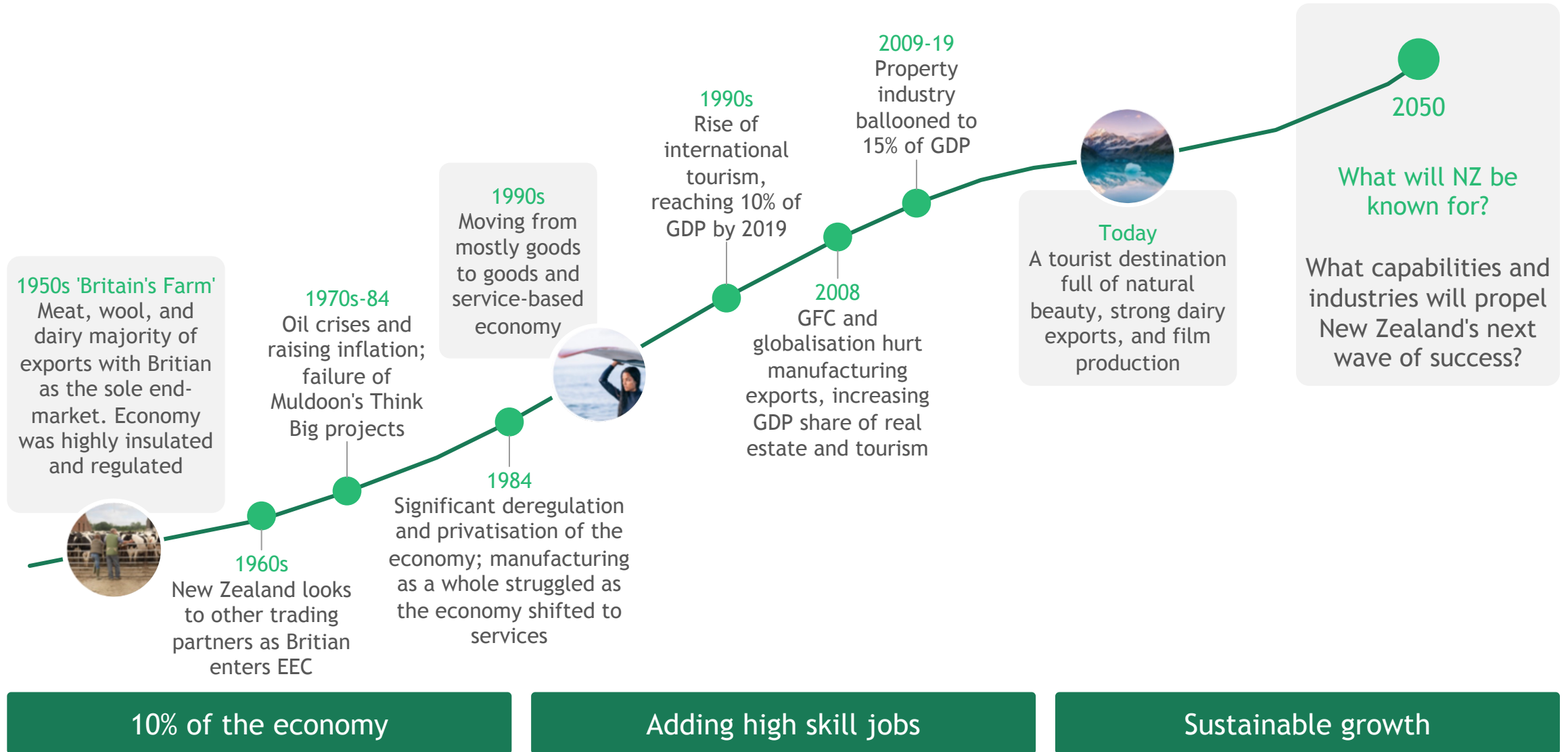


# BCG's Purpose

*Unlock the potential of those who advance the world*



# Evolution of NZ Inc: What will NZ be known for in 2050?

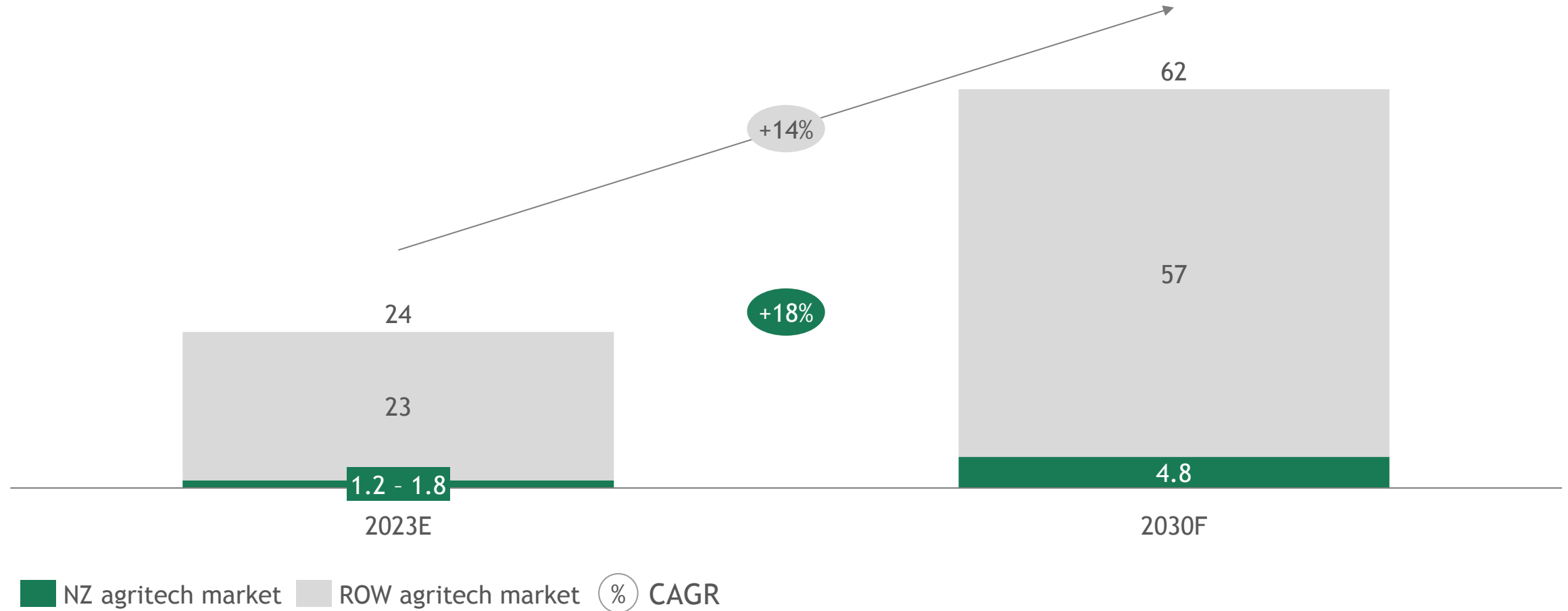


# The opportunity: Growing our advantage in Agritech

Agritech is the technology that improves the way we grow, farm, harvest, produce and package food and fibre. Agritech is the most mature and immediate opportunity for NZ Inc.

# The Global Agritech market is projected to reach ~US\$60 billion by 2030

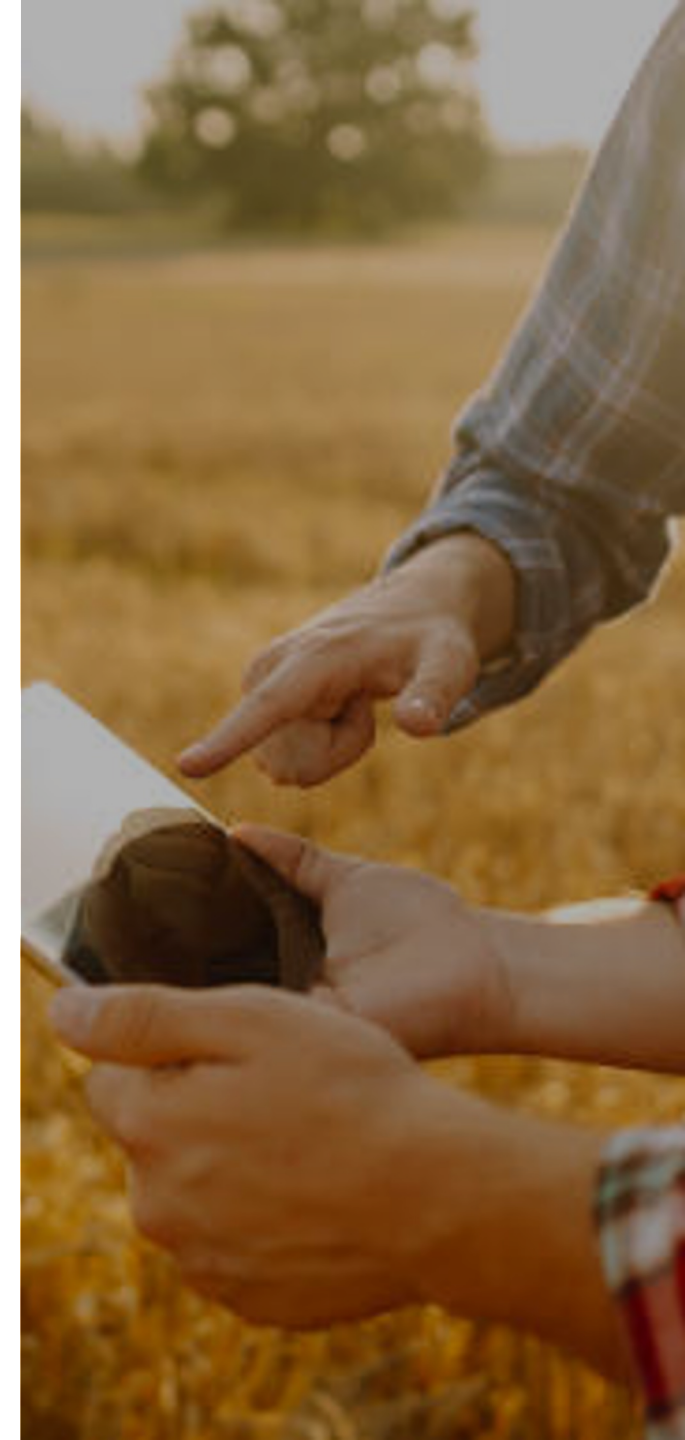
Agritech market size in \$US billion



Note: 0.6 NZD-to-USD conversion rate used; 2030 figure estimated using '24-29 CAGR; Source: MBIE Agritech Industry Transformation Plan (2023); Global Agritech Market Forecast ('24-29), Research and Markets

## Why Agritech is attractive for NZ

- 1 Global brand tied to agriculture, sustainability, cultural connection and innovation, separately
- 2 Key elements of the ecosystem already exist as a foundation
- 3 Enduring competitive advantage as an innovation lab test bed

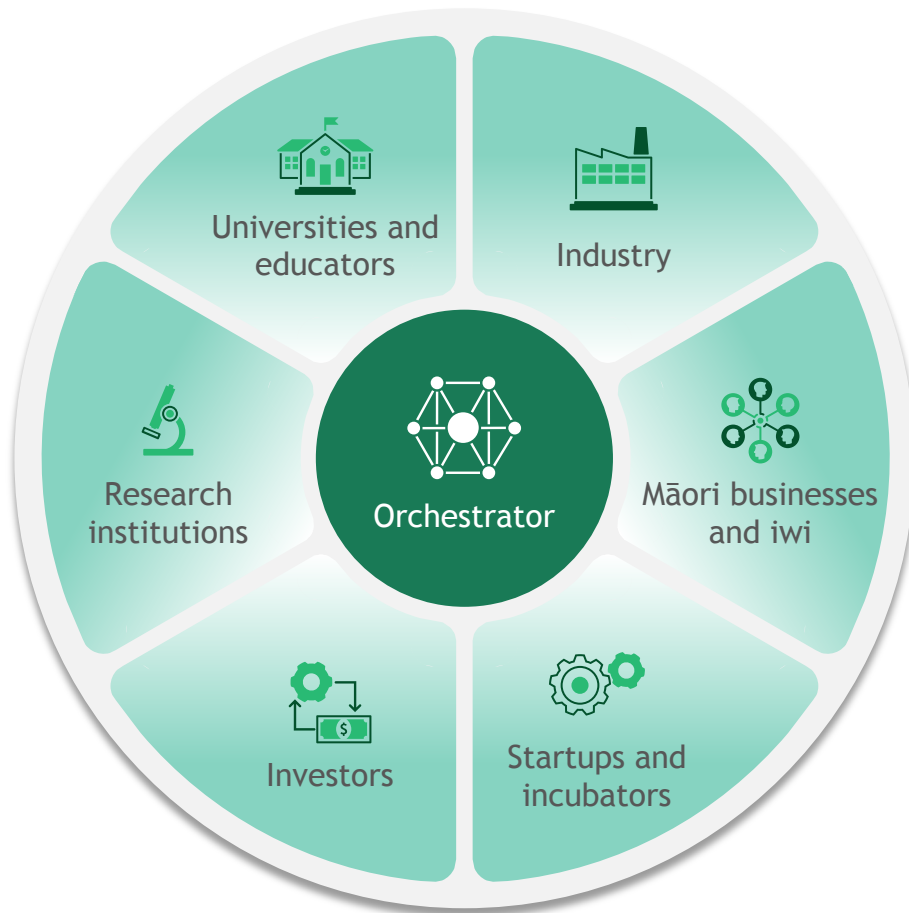


By 2050, Aotearoa New Zealand will be a global powerhouse in agritech



A living laboratory and vibrant ecosystem where world-leading research, innovative talent, cultural values and investment converge. Our spirit of ingenuity will power technologies that lead global markets, our start-ups will scale across continents, and our economy will grow through innovation grounded in respect for the whenua.

# Ecosystems: New Zealand's next Agritech growth engine

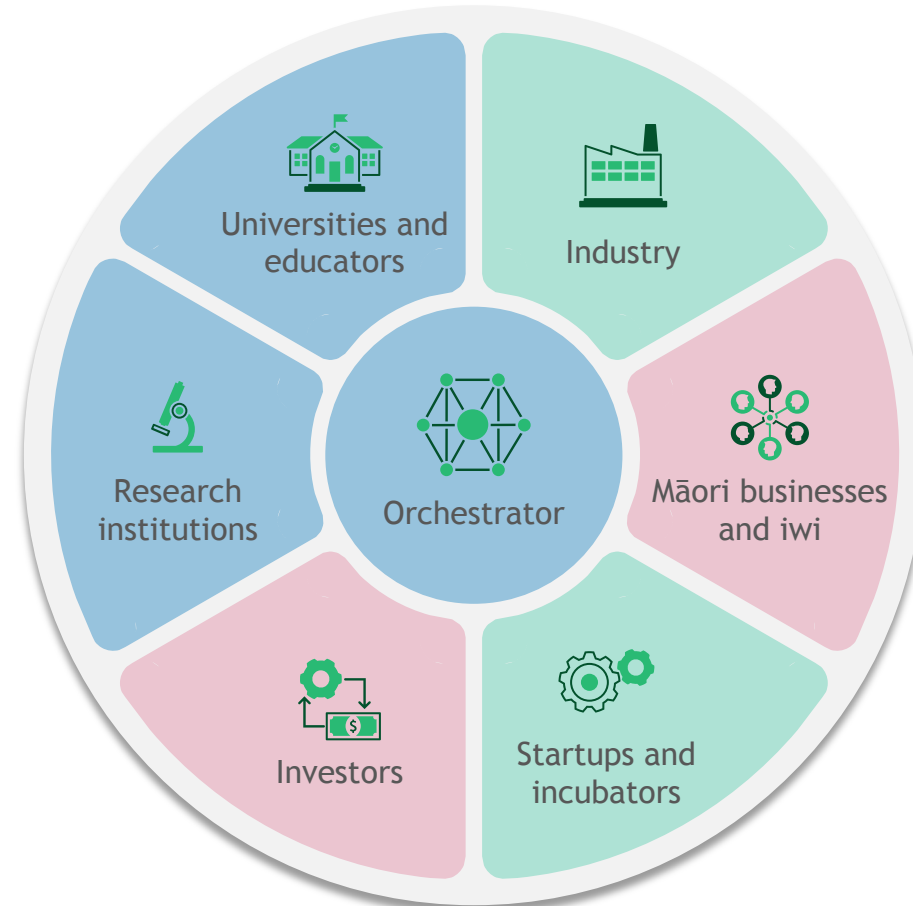


- 1 Industry, to scale up innovations and create anchor demand
- 2 Startups and incubators, to create breakout opportunities and to commercialise innovation
- 3 Investors, to provide funding and cross-venture expertise to support new ventures
- 4 Research institutions to generate IP and experienced talent
- 5 Education providers, to prepare talent to support the ecosystem
- 6 Orchestrators, to connect ecosystem players and promote the ecosystem globally



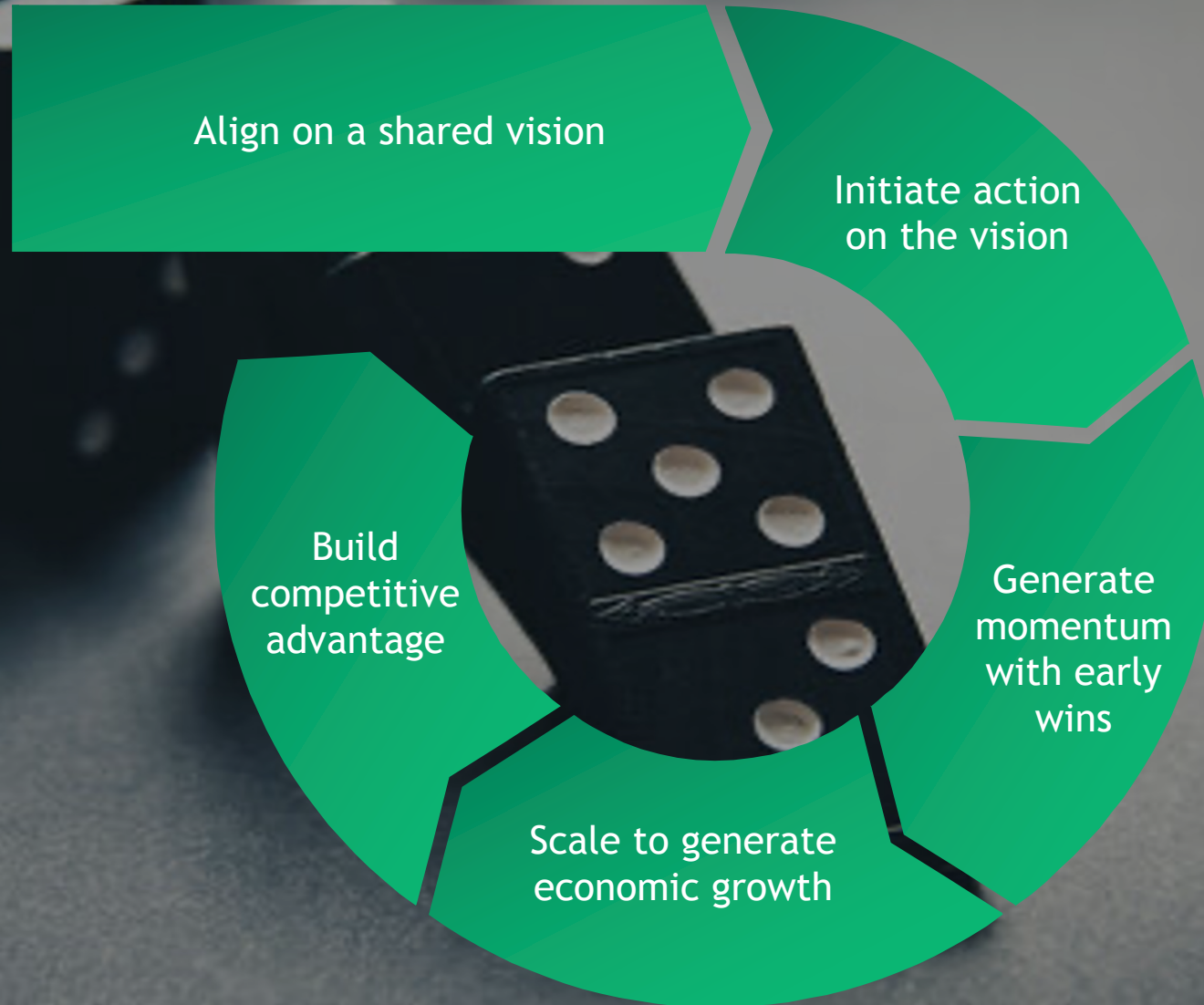
# Netherlands & Singapore: Insights from global leaders in Agritech

# Assessing the current state of NZ's agritech ecosystem



- 1. Critical gap
- 2. Opportunity
- 3. Strength

# AgriTech: Jumpstarting the NZ Inc flywheel



# Keeping the door to NZ Inc open: the role of NZFSSRC in Agritech

Trust

Sustainability

Cultural values

## By 2030, NZ's agritech ecosystem will:

- **Double (or more) foreign and domestic investment in agritech** - creating a clear, connected entry point for investors seeking to engage with New Zealand's agritech opportunities
- **Scale homegrown ventures beyond New Zealand** - supporting more start-ups to bridge the gap between innovation and international markets
- **Unlock innovation from our universities** - turning research excellence into real-world solutions through strong commercialisation pathways and partnerships
- **Cultivate the next generation of talent** - specialising our universities and strengthening STEM education so students can grow their agritech futures in New Zealand
- **Embed Māori cultural values** - integrating kaitiakitanga and long-term stewardship into the fabric of New Zealand's agritech value proposition, setting us apart as a nation that innovates with purpose

# Ngā mihi. Thank you.



NZ Agritech



Future of NZ Inc



NZ Megatrends



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