

Dairy Industry: Evolution of current structure

Tony Baldwin

www.tonybaldwin.co.nz

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Purpose

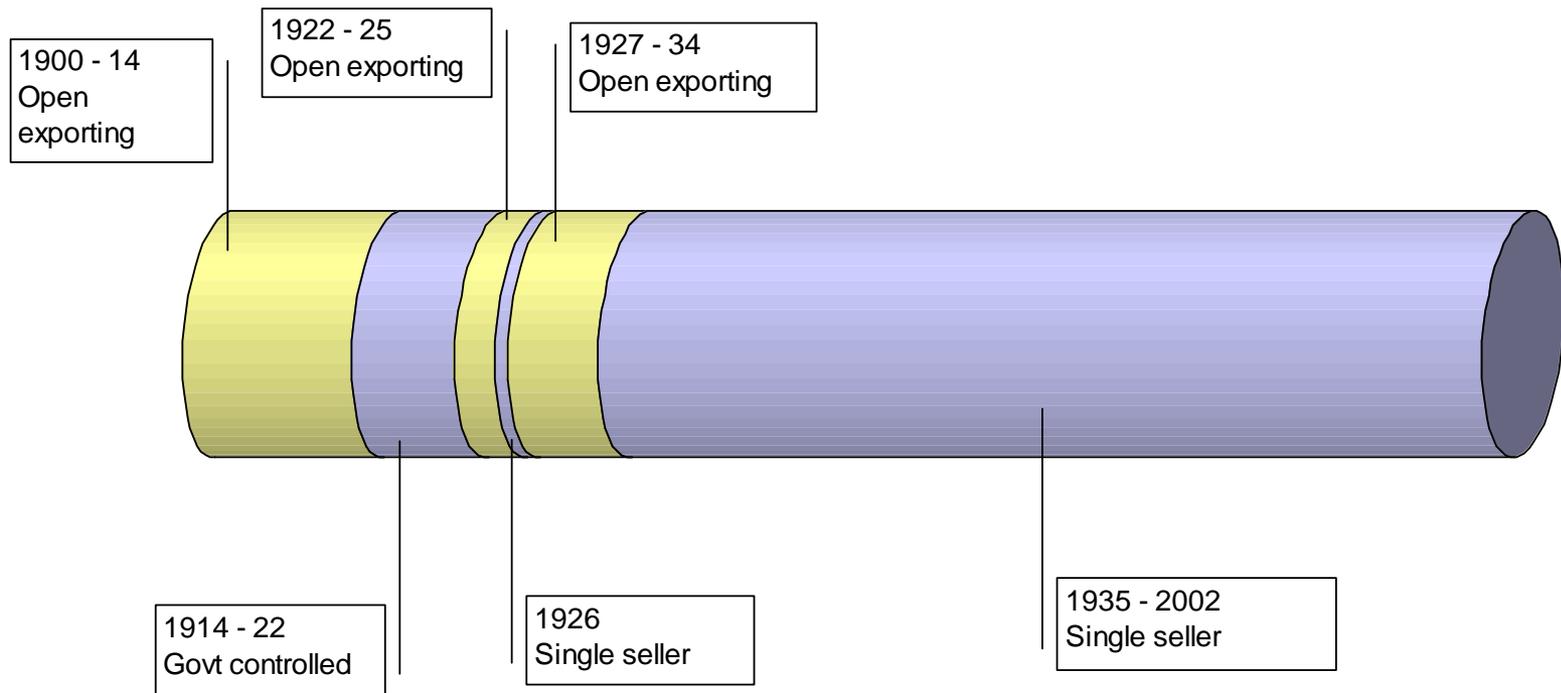
Fonterra's legislated dominance continues more than 100 years of suppressing diversity and experimentation in how to best capture value beyond the farm gate, to the significant cost of the New Zealand economy.

This set of slides shows the evolution of the dairy industry's structure in a **series of diagrams** from 1900 –

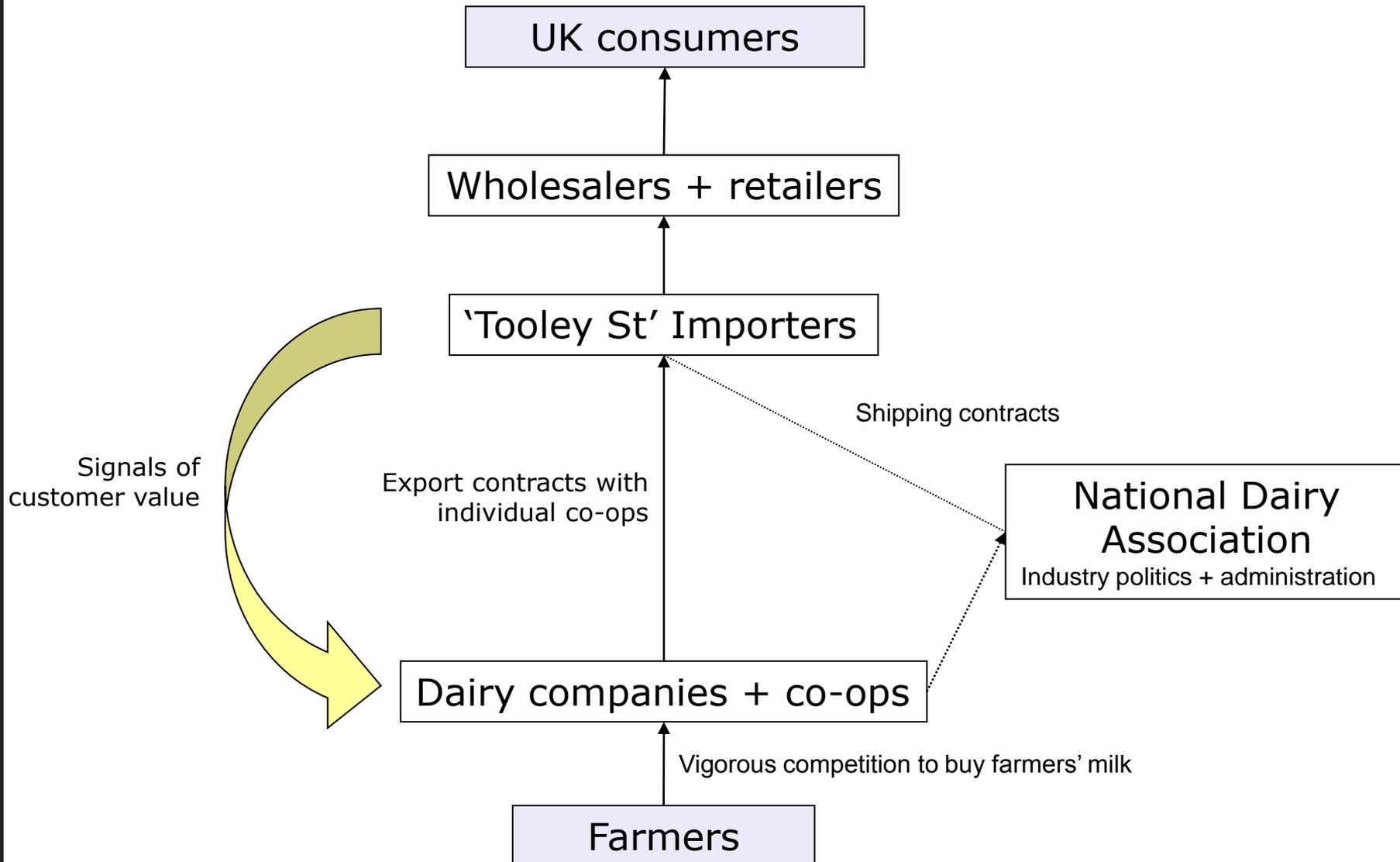
With particular focus on the government and industry bodies put in place between farmers and end customers overseas to control marketing and exporting

Overveiw

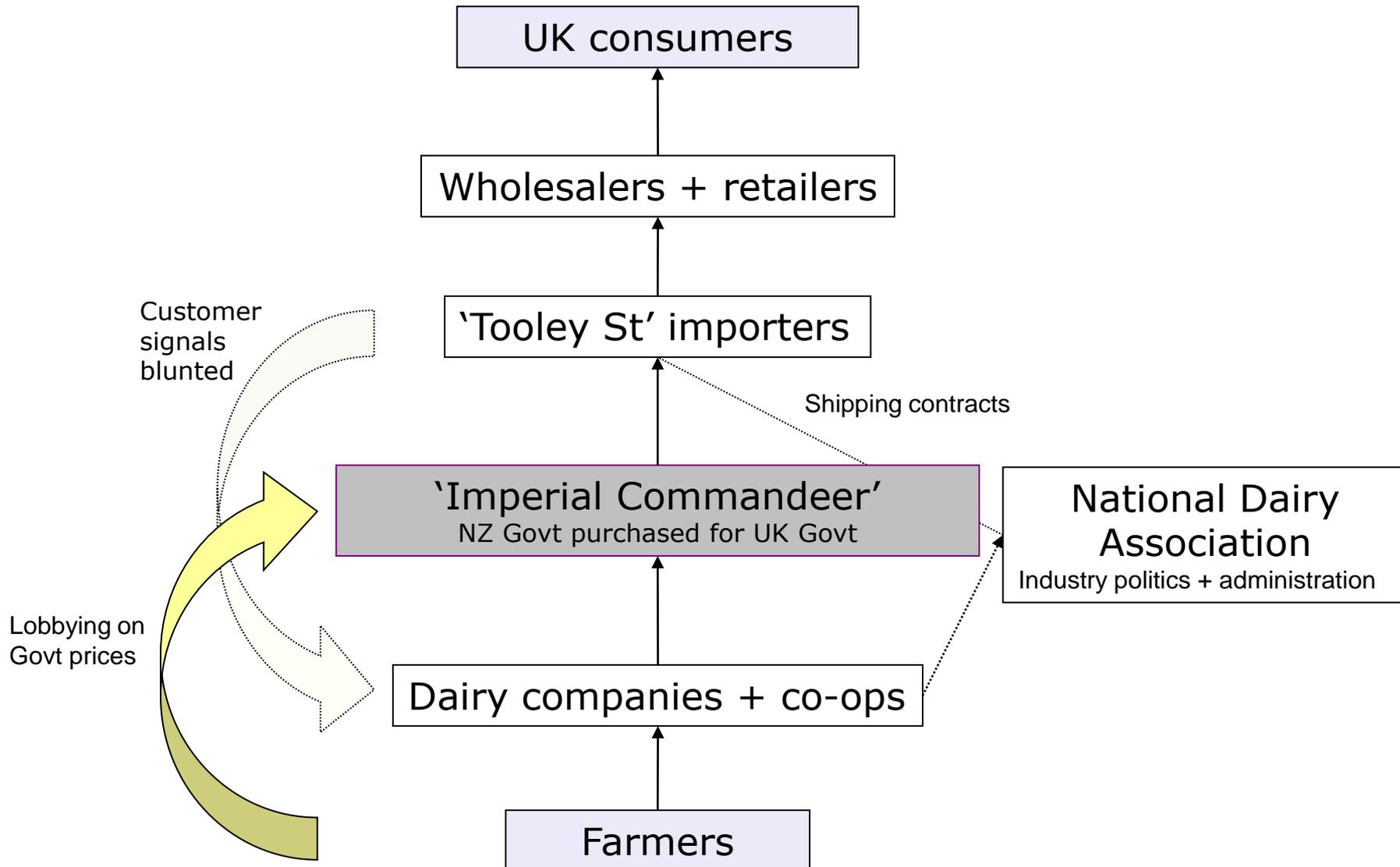
Periods of open exporting in the 20th century were limited



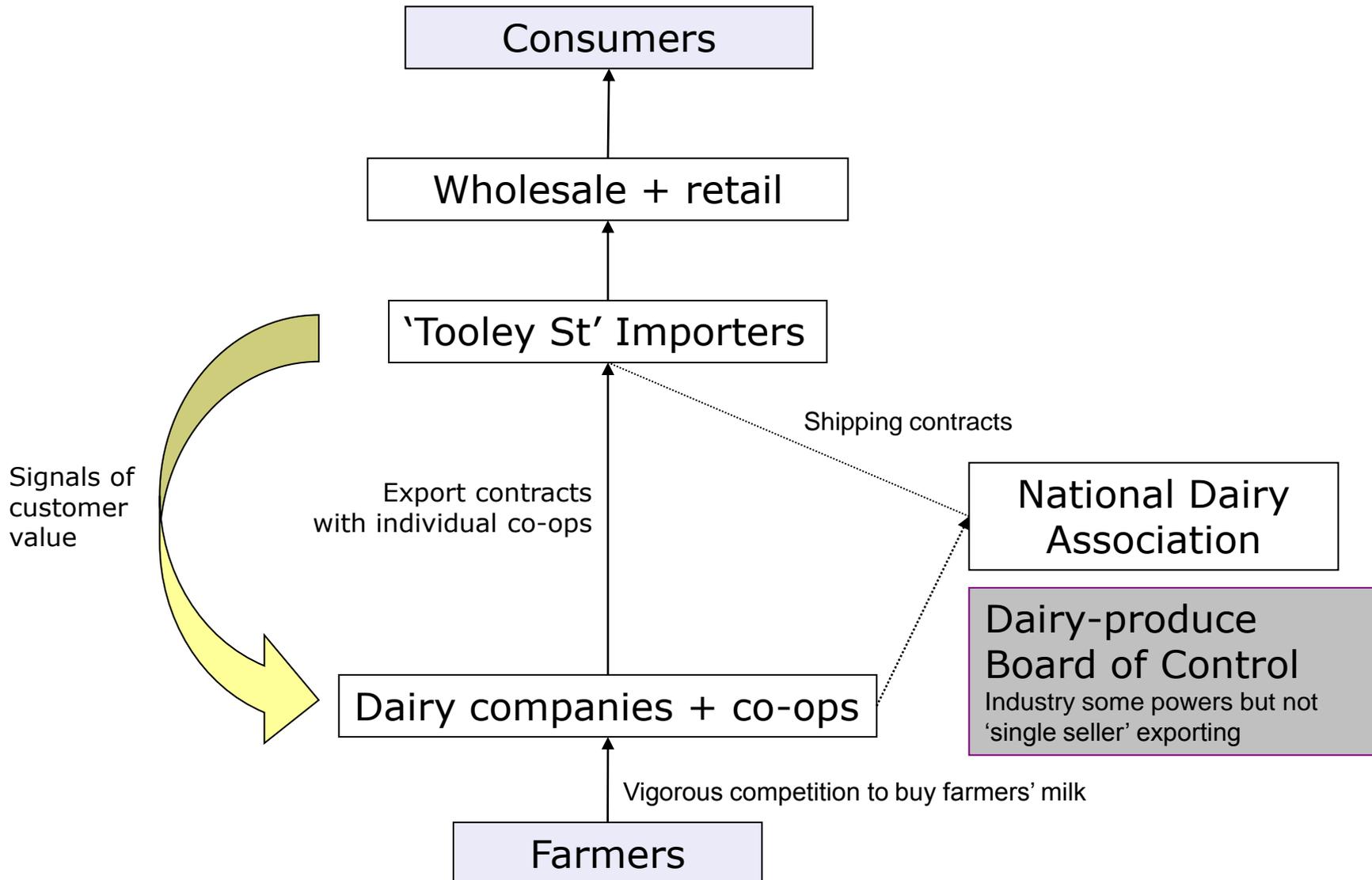
1890 – 1914: Open Exports



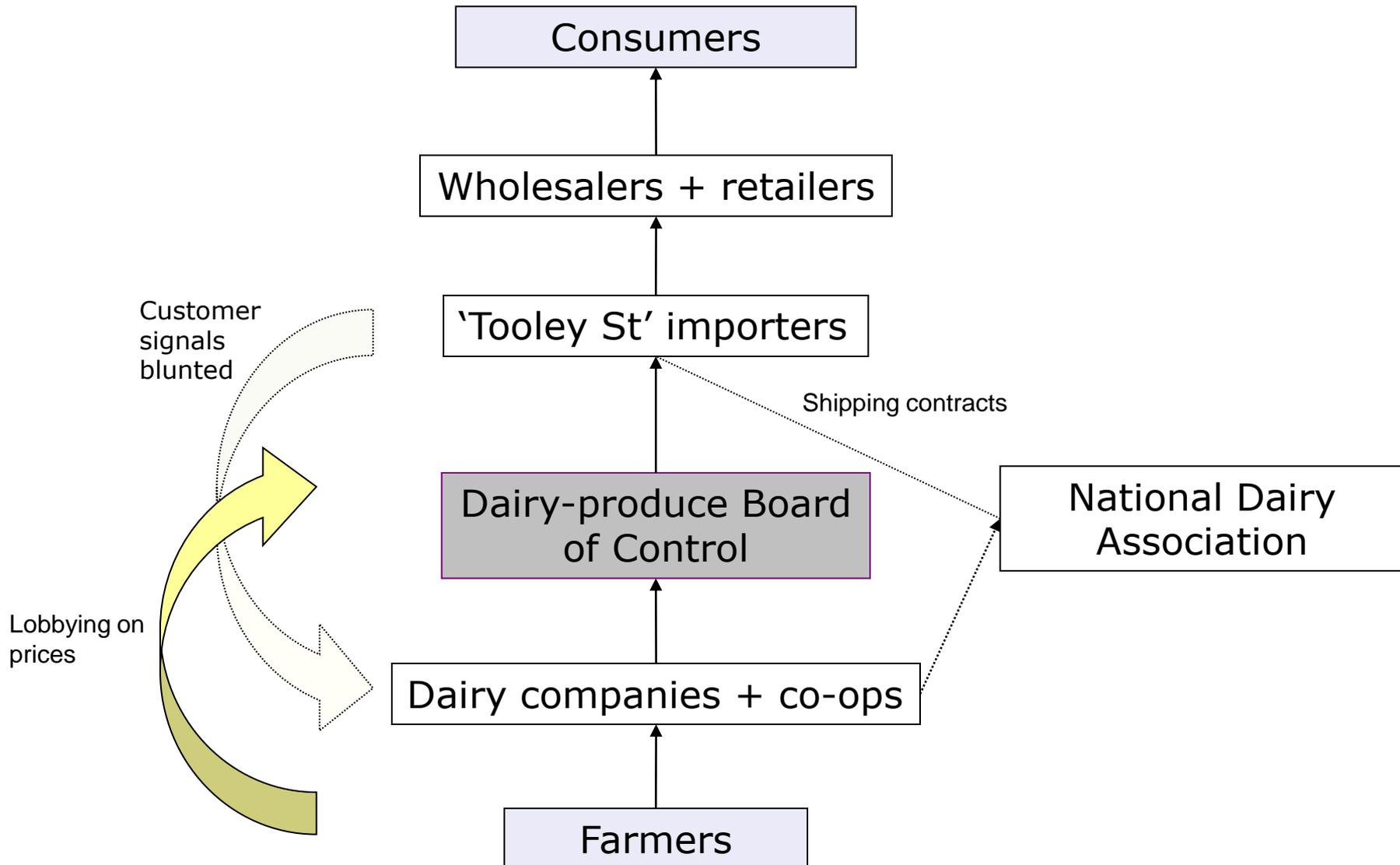
1914 - 22: Single exporter



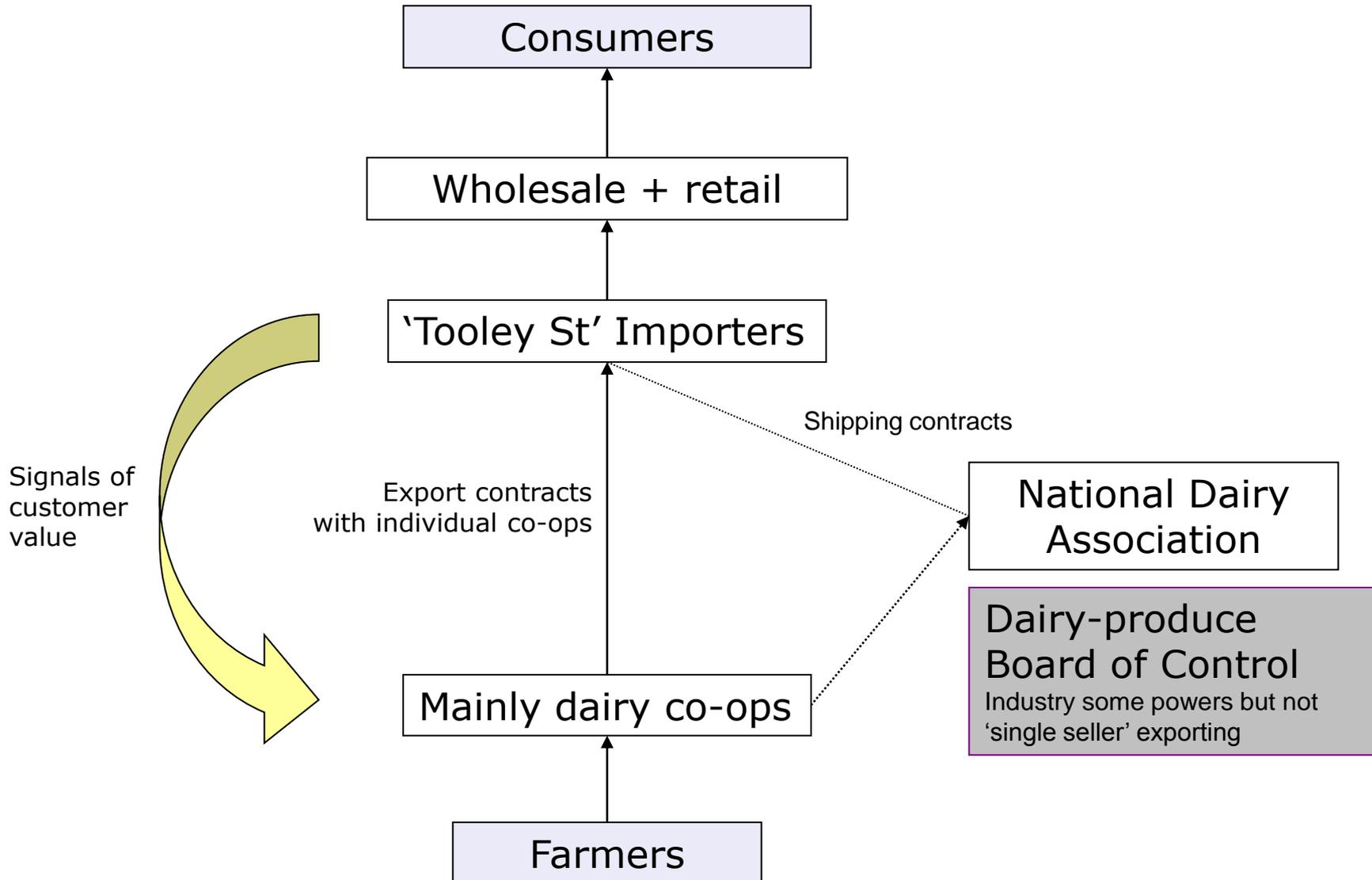
1922 – 25: Open exporting



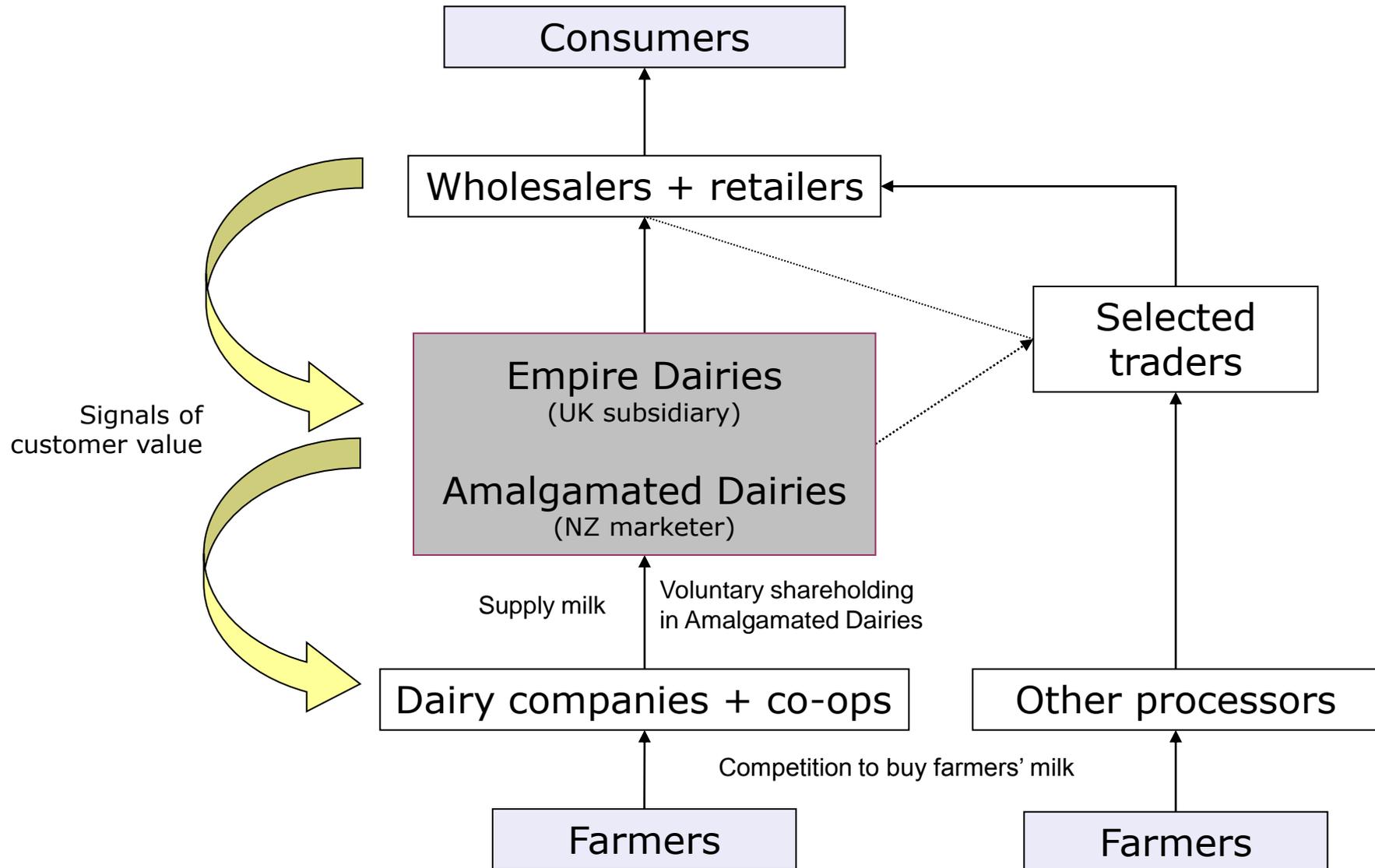
1926: Single exporter



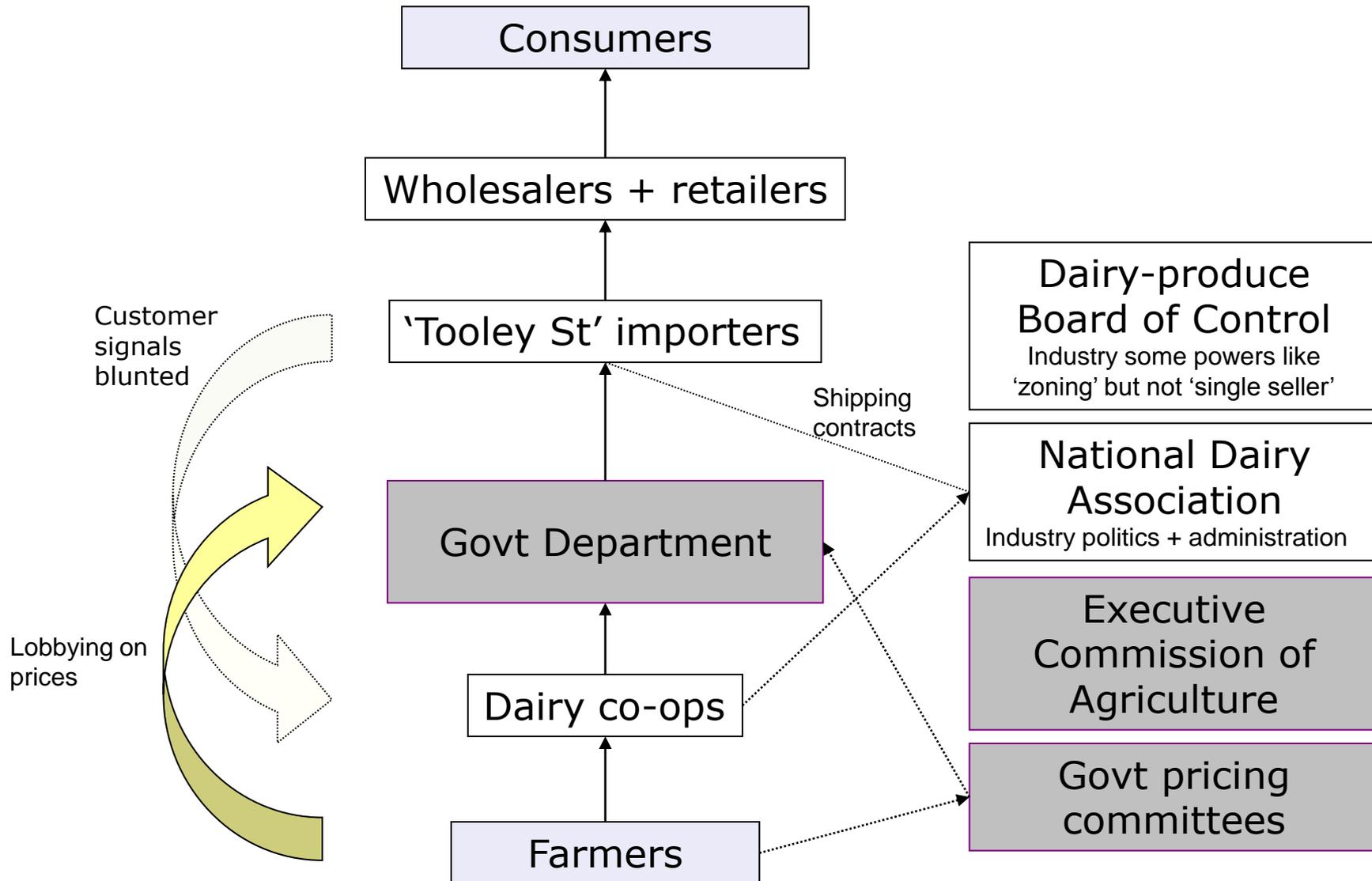
1927 – 34: Open exporting



1927: Sir W Goodfellow's proposal



1934 – 46: Single exporter

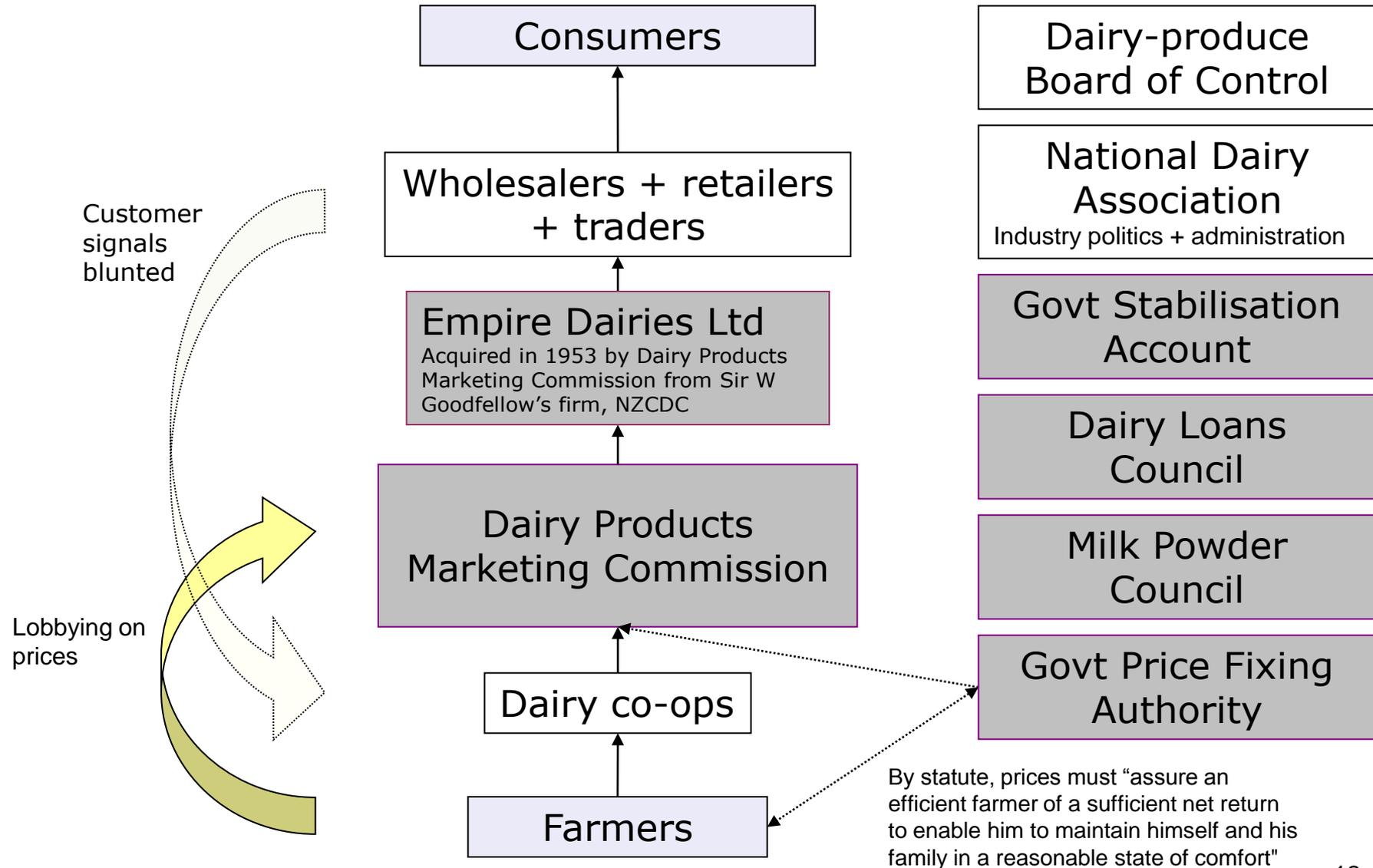


Government guaranteed price scheme

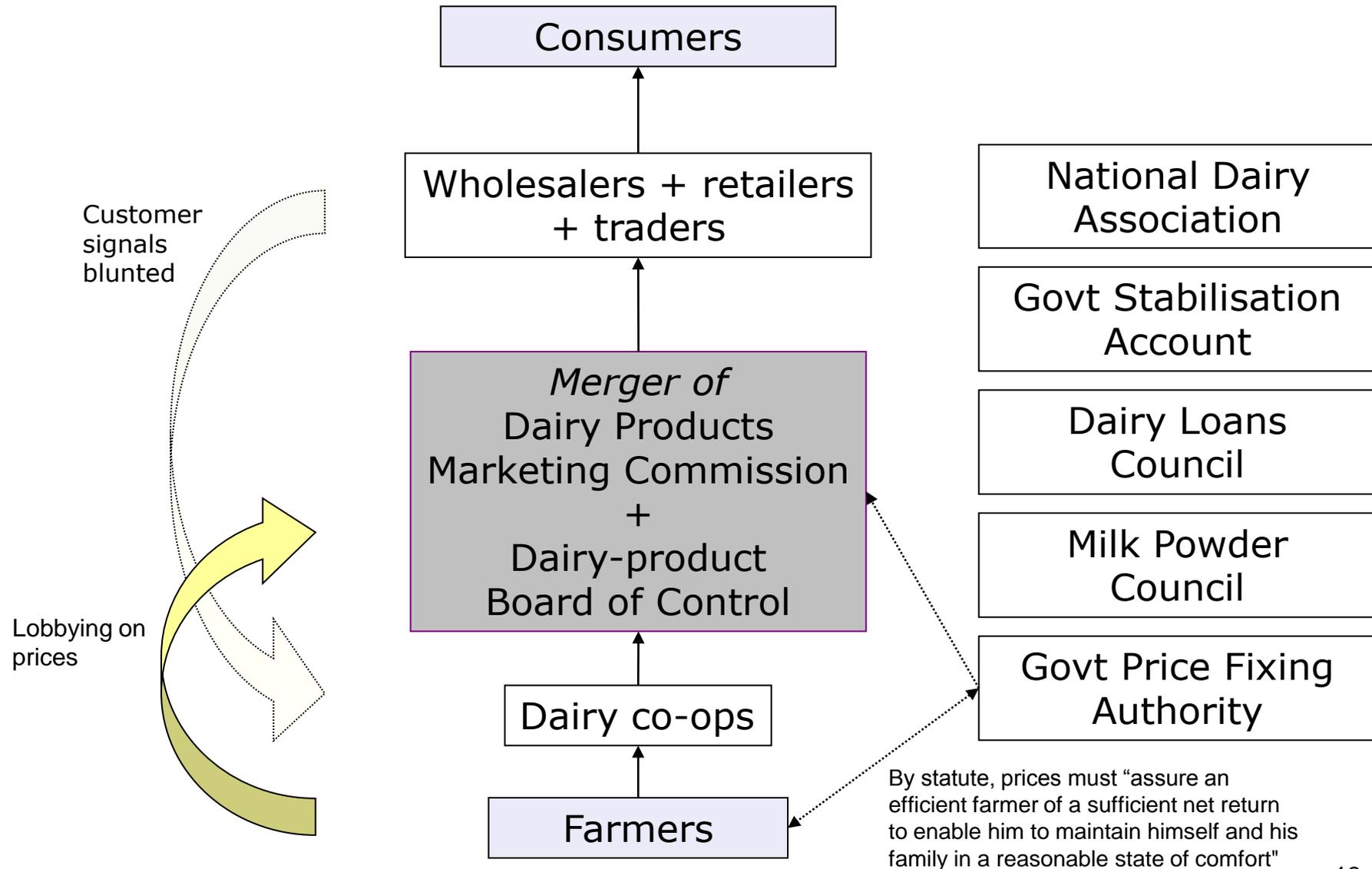
Government had to “set prices that assure an efficient farmer of a sufficient net return to enable him to maintain himself and his family in a reasonable state of comfort.”

(extract from the relevant legislation)

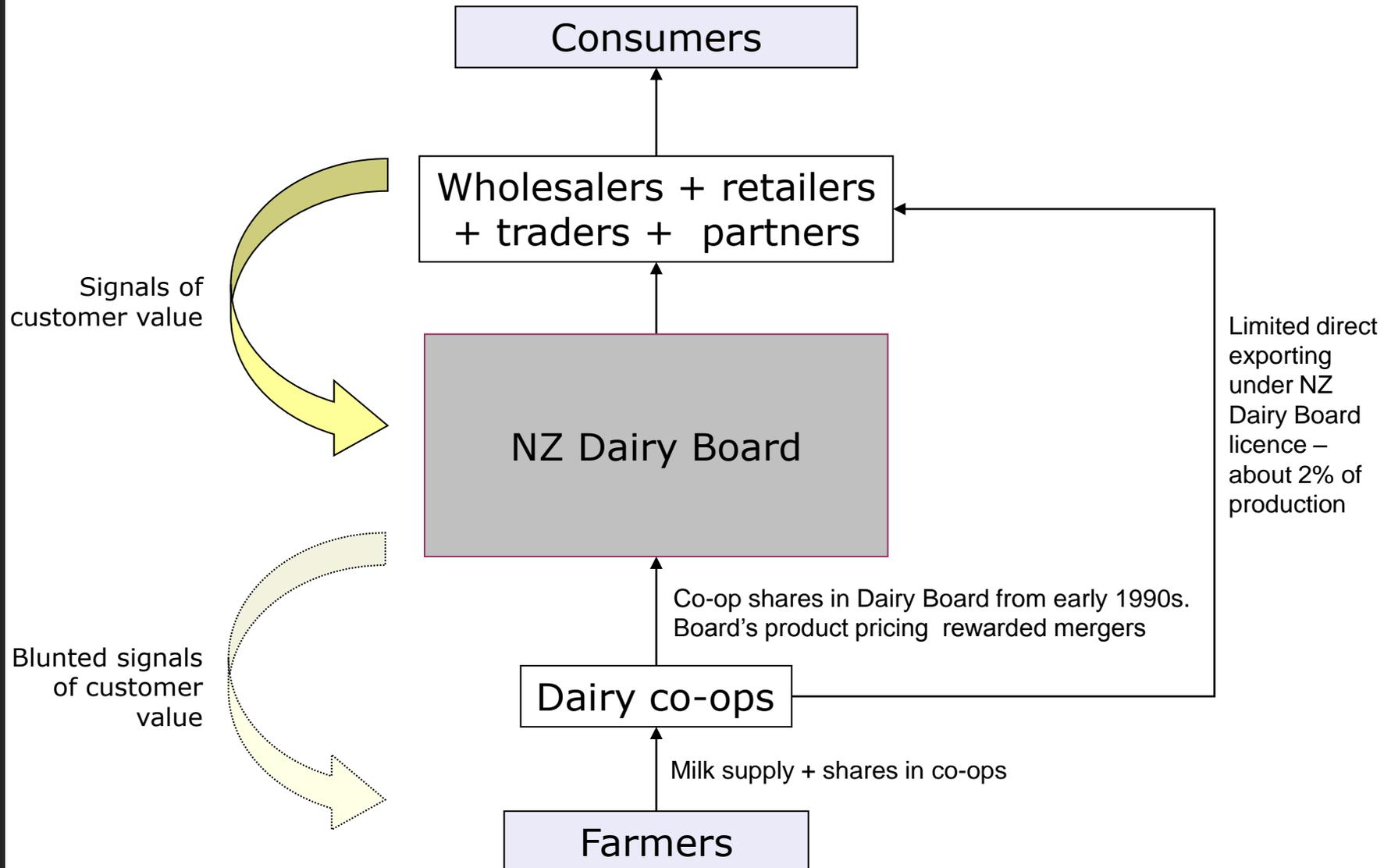
1946 – 62: Single exporter



1962 – early 80s: Single exporter



Early 1980s - 2002



2002 – present: Open exporting

