GENERAL

NARA YEAR TWO

BUILDING RESILIENT DEMAND FOR NEW ZEALAND VENISON

More stores • More products • More venison sold

Deer Industry New Zealand

BUILDING ON A STRONG FOUNDATION

The North American Retail Accelerator (NARA programme) was established to build year-round demand for New Zealand farmed venison by increasing its presence in retail channels across the United States and Canada.

After a strong start in Year One, Year Two presented a more challenging trading environment, including periods of uncertainty around tariffs and market access. Despite these headwinds, the programme continued to expand its retail footprint, launch new products, and significantly exceed its key performance targets.

Retail export value for the year of $23.5 million again more than doubled the programme's annual objective. Most notably, exports of high-value leg cuts increased from 394,000 kg to 545,000 kg, demonstrating growing consumer demand for New Zealand farmed venison through retail channels.

MEASURE	YEAR ONE	YEAR TWO
New retail banners secured	12	8
New SKUs launched	8	4
High-value leg cuts exported	394,000 kg	545,000 kg
Retail export value (FOB)	$25.8 million	$23.5 million

Note: A SKU, or Stock Keeping Unit, is a distinct retail product, such as a different cut, pack size or product format.

AT A GLANCE

8

NEW RETAIL BANNERS SECURED

Expanding the availability of New Zealand farmed venison across North American retail channels

4

NEW VENISON SKUS LAUNCHED

Creating new opportunities for consumers to discover and purchase NZ venison year-round

545,000 kg

HIGH-VALUE LEG CUTS EXPORTED

182% of the annual target, up 38% on Year One

$23.5 million

RETAIL EXPORT VALUE (FOB)

More than double the annual target of $10.4 million

NARA has moved beyond establishing retail partnerships to proving New Zealand venison can generate sustained, year-round consumer demand in North America.



WHY THIS MATTERS TO DEER FARMERS

NARA was created to help address two of the industry's long-standing challenges: generating greater value from the venison leg and building demand outside the traditional European game season.

By growing retail demand in North America, the programme is helping to:

- Increase demand for high-value venison cuts
- Improve whole carcass utilisation
- Build consumer awareness of venison
- Diversify market channels
- Support stronger long-term returns for New Zealand deer farmers

A RESILIENT RESULT

The Year Two results are particularly noteworthy given the market conditions faced throughout the year.

Changes to tariff settings and broader market uncertainty created additional complexity for importers, distributors, and retailers. Despite this, retailers continued investing in New Zealand farm-raised venison, additional products were launched, and programme targets were comfortably exceeded.

The ability to maintain momentum and deliver growth through changing market conditions reinforces the value of building long-term retail demand rather than relying solely on seasonal market opportunities.

EMERGING OPPORTUNITIES

HEALTH AND WELLNESS

Consumers are increasingly seeking nutrient-dense foods that support healthy lifestyles.

HIGH-QUALITY PROTEIN

Demand continues to grow for premium proteins with strong nutritional credentials.

GLP-1 CONSUMERS

The rise of GLP-1 weight-management medications is increasing interest in lean protein and satiety-focused eating.

MAKE AMERICA HEALTHY AGAIN

Growing policy and consumer focus on nutrition presents opportunities for naturally nutrient-dense foods such as NZ farmed venison.

REGENERATIVE AG PILOT PROGRESSES

One of our export companies continues to advance a regenerative agriculture pilot involving 20 deer farms, exploring opportunities to add value to New Zealand farm-raised venison in the US export market. Farmer participation has been enthusiastic, with encouraging signs for both farm productivity and future market potential. Sixteen farms have now achieved regenerative certification through an internationally recognised framework, supported by a programme of on-farm workshops and knowledge sharing. The project is also contributing to a stronger consumer story around venison's nutritional and sustainability credentials.

545,000 kg

High-value venison leg cuts exported during Year Two

38% on Year One

82% above target



LOOKING AHEAD

PLANNING FOR THE NEXT PHASE

NARA is scheduled to conclude in June 2027, and planning is already underway for what comes next.

Future market development activity is expected to build on the foundations established through NARA while responding to evolving consumer trends.

