DairyNZ

# New Zealand Dairy Workforce Insights

Welcome to the second edition of **New Zealand Dairy Workforce Insights**, a regular short update for DairyNZ partners and interested dairy farmers. Each edition will take one workforce trend, unpack what the data is telling us, and translate it into practical implications for farm businesses and the wider sector.
The aim is to make workforce data easier to understand and more useful in decision-making: what is changing, why it matters, and where support, investment or conversation may be needed next.
We will share these insights monthly, keeping each edition focused, practical and easy to scan so they can support conversations, planning and on-farm engagement.

**Coming next:** We will look at the demographics of the on-farm dairy workforce across age, gender and ethnicity over time and how these compare to the general New Zealand population. Spoiler alert – two of the three demographics have seen significant change, one has seen little change over 25 years.

## Edition 2 | Immigration has become a structural part of our workforce

### Headline insight:

**Dairy's workforce is increasingly reliant on immigration.** The number of people on dairy farms holding some form of visa has increased from very few in the early 2000's to nearly a quarter of the total workforce today, and around one third of employees. In Canterbury and Southland, half of employees were born overseas.

### Why this matters:

Immigration is now part of how dairy gets work done. It brings opportunity but also exposes farms and the sector to policy change, settlement pressure and workforce stability risks. As reliance on international employees grows, strong employment practice matters even more: clear agreements, safe conditions, fair treatment, effective communication and good compliance all help protect employees and support good employers. Retaining skilled people will depend on strong leadership, competitive conditions and clear development pathways, especially once people gain residency and choice.

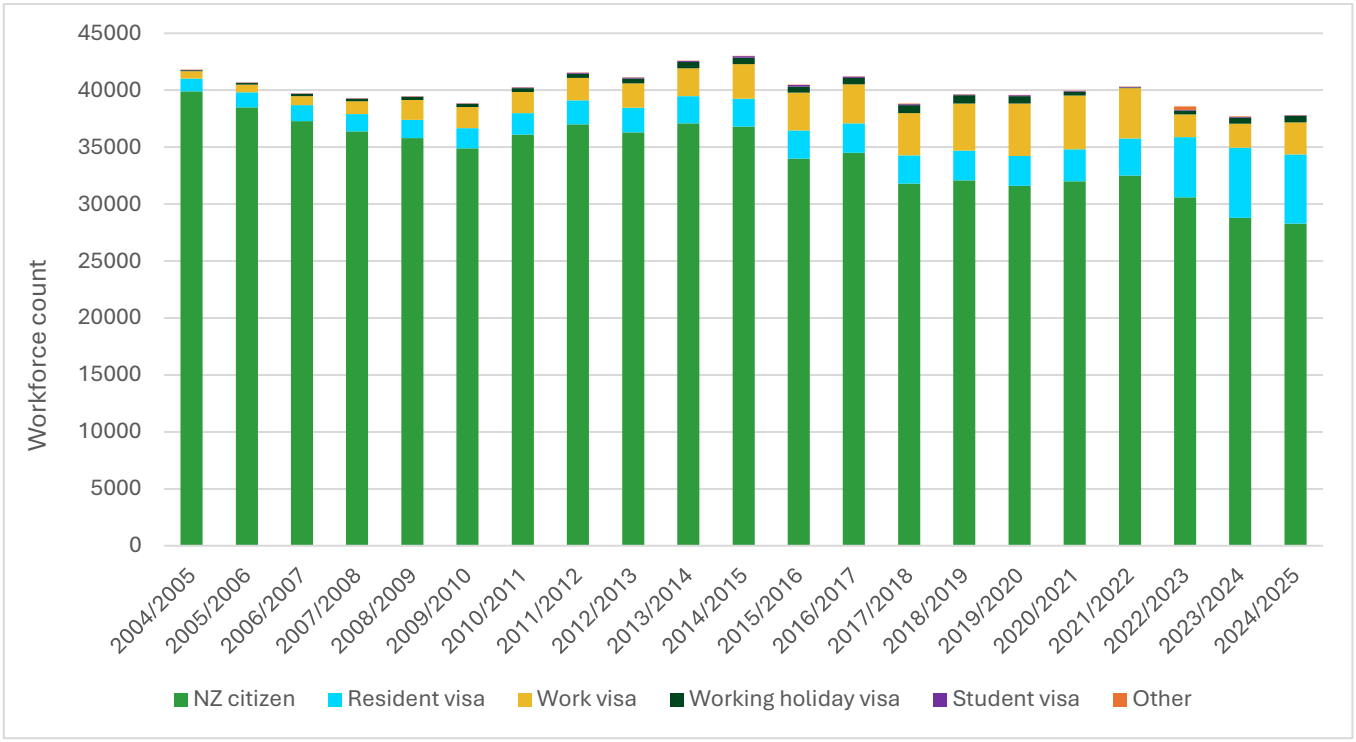
### What the data shows:

There has been a major shift in dairy's workforce mix. NZ citizens are still the largest group, but their numbers have fallen from 39,900 in the 2004/05 season to 28,300 in the 2024/25 season, while resident visa holders have grown from 1125 to 6,050 and work visa holders from 654 to 2,825 over the same period. Non-NZ citizens now make up 25% of the total workforce and around one in three employees.

Gaining residency is a key goal for many international employees, including because it enables them to progress into business ownership. In 2024/2025 1750 residents owned dairy businesses.

**Graph 1: Workforce by right to work, 2004/05 – 2024/25**

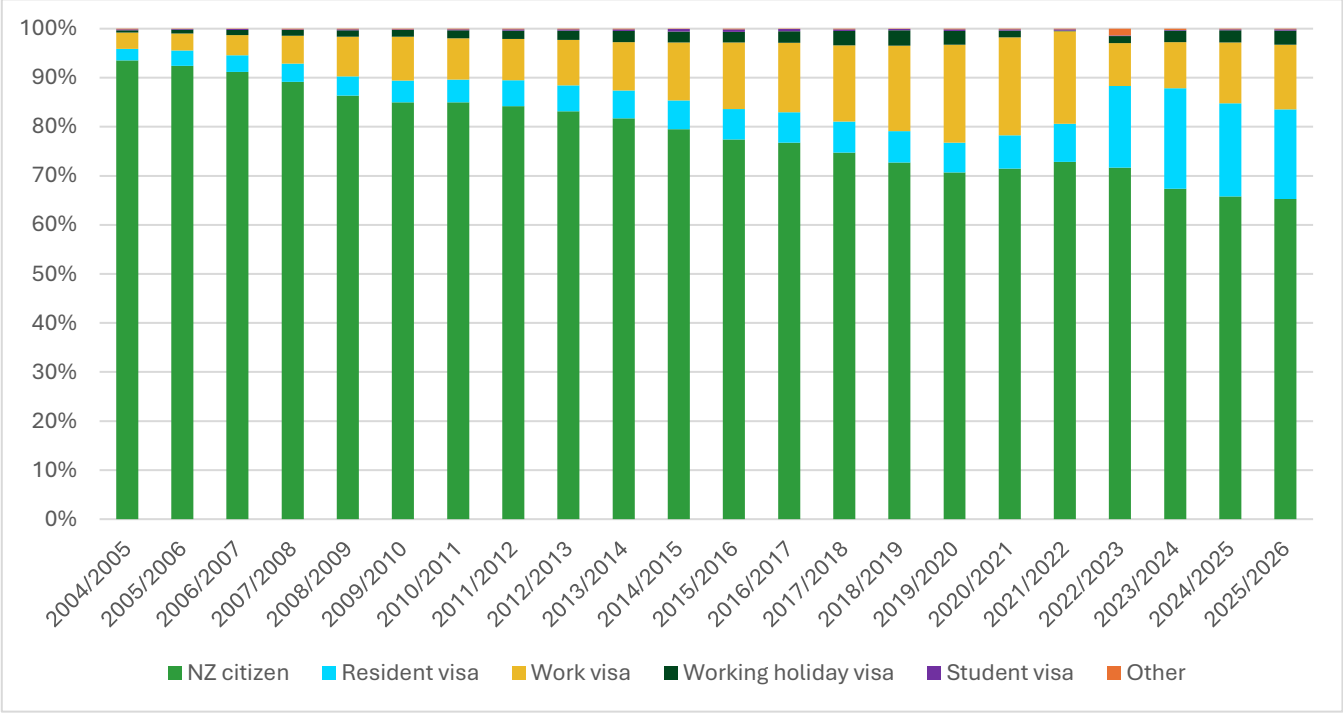
*Bar graph showing full workforce (employees, employers and self-employed) over time.*




**Key message:** Immigration has moved from a small part of the on-farm dairy workforce to a structural feature, with strong growth in resident visa, work visa and working holiday visa holders.

**Graph 2: Share of employees by right to work**

*Stacked bar chart showing trend of employees only from 2004/05 – 2025/26*




**Key message:** Around one third of dairy employees are not NZ citizens. This has practical implications for recruitment, team support, communication, retention and exposure to immigration policy.

**Graph 3: Share of business owners by right to live in NZ**

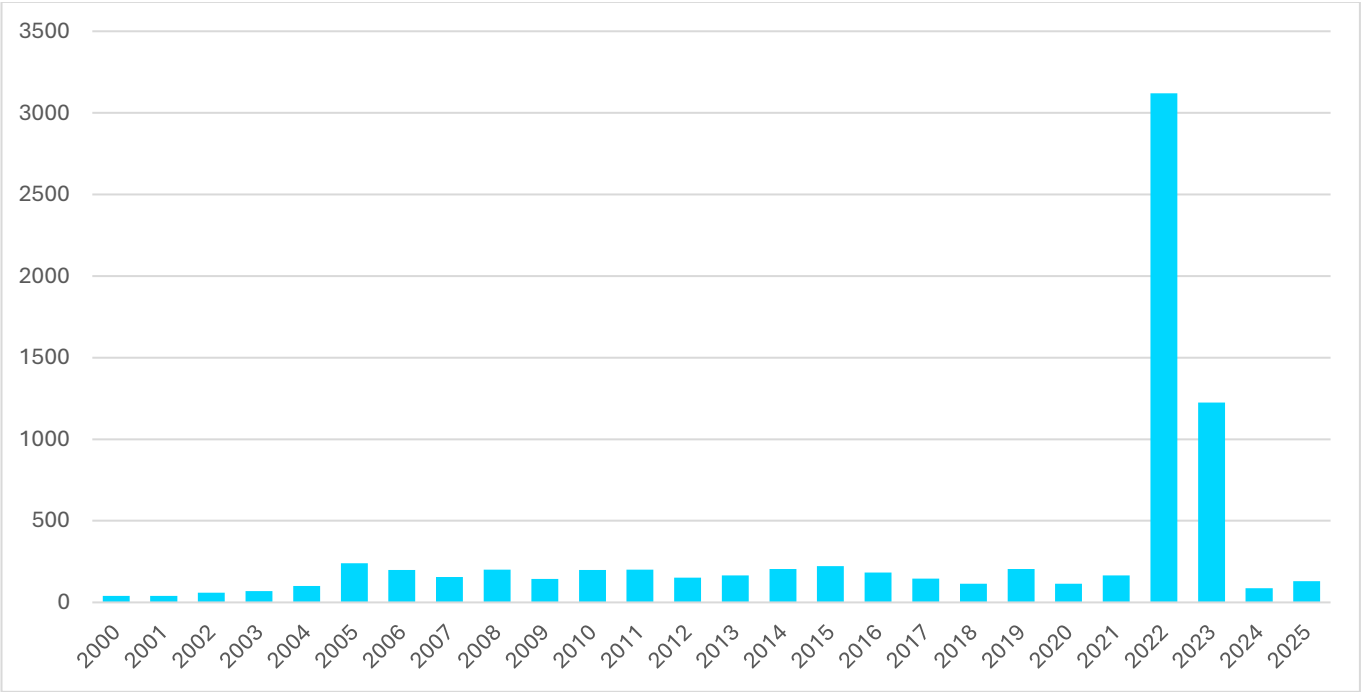
*Stacked bar chart showing the increase in NZ residents owning dairy businesses over time.*




**Key message:** More residents are moving into dairy business ownership, showing immigration is not just filling jobs but also building future ownership and sector capability.

**Graph 4: Conversion to residency**

*Bar chart showing the number of work visa holders in dairy that converted to NZ residency each year.*




**Key message:** The 2021 Resident Visa created a one-off pathway for many work visa holders to gain residency, but future pathways are unlikely to be as broad or accessible.

## Key trends:

- **Immigration is now structural:** non-NZ citizens have moved from a very small share of the dairy workforce in the early 2000's to about a quarter of the total workforce today.
- **Employees show the reliance most clearly:** around one in three dairy employees now has some form of visa or residency status, making immigration settings a practical business issue, not just a policy issue. In Canterbury and Southland half of employees were born overseas.
- **Residency has shifted the picture:** the 2021 Resident Visa helped many work visa holders move into residency, giving people more security and choice, but also increasing the need for good retention, leadership and development pathways.
- **Working holiday visas still matter:** they continue to provide flexibility for some farm businesses, while also showing that suitable local labour is not always available when and where it is needed.
- **Watch point:** a stronger reliance on international employees increases exposure to immigration policy changes, so dairy needs to stay above the line on employment practice, settlement support and domestic recruitment.

## So what?

- **For farmers:** recruit locally first and plan workforce needs early. Where immigration is needed, understand visa conditions and be ready for policy changes affecting who can be employed, for how long and on what terms. Build the kind of workplace where good people choose to stay through clear agreements, fair rosters, safe housing and farms, good communication, pastoral support, strong leadership and visible development pathways.
- **For DairyNZ and partners:** support farmers on recruitment, employment practice, people management and leadership, settlement support and retention, and learning opportunities, while advocating for immigration settings that reflect genuine labour need.
- **For the sector:** build a workforce that is attractive to New Zealanders and international employees, resilient to immigration policy change and with pathways for people to stay and progress.

## Bottom line:

The New Zealand dairy workforce story is now also an immigration story. There are genuine reasons dairy cannot meet all its workforce needs domestically, but the sector also needs to keep improving the jobs, workplaces and career pathways it offers so more New Zealanders want to work, stay and progress in dairy farming.

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**Data source:** DairyNZ People Statistics dashboard (developed from Stats NZ data).

Dairy season workforce counts run from 1 June to 31 May and are labelled using both calendar years.:

- Employee counts for a dairy season are based on the average of the available monthly employee counts across the June–May period.
- Employer and self-employed counts use the corresponding tax year ending in March. For example, employer and self-employed figures reported for the 2024/25 dairy season use the tax year ending March 2025.

**Definitions:**

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| Employers: | Business owner (company director, shareholder, partnership or partner income) with paid employees |
| Self-employed: | Business owner (sole-trader or withholding or schedular-payment income) with no paid employees |
| Employees: | Earning wages or salary |

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|---|---|
| NZ citizen: | A person with New Zealand citizenship and an ongoing right to live and work in New Zealand. |
| NZ resident: | A person who holds a resident visa and can live and work in New Zealand, subject to their visa conditions. |
| Work visa: | A person with permission to work in New Zealand for a set period, usually linked to specific visa conditions. |
| Working holiday visa: | A temporary visa that allows eligible young people from some countries to travel and work in New Zealand. |
| Student visa: | A temporary visa for study in New Zealand, which may allow limited work depending on visa conditions. |

**Disclaimer for Stats NZ data**

Access to the data used in this study was provided by Stats NZ under conditions designed to give effect to the security and confidentiality provisions of the Data and Statistics Act 2022. The results presented in this study are the work of the author, not Stats NZ or individual data suppliers.

These results are not official statistics. They have been created for research purposes from the Integrated Data Infrastructure (IDI) and Longitudinal Business Database (LBD) which are carefully managed by Stats NZ. For more information about the IDI and LBD please visit https://www.stats.govt.nz/integrated-data/

The results are based in part on tax data supplied by Inland Revenue to Stats NZ under the Tax Administration Act 1994 for statistical purposes. Any discussion of data limitations or weaknesses is in the context of using the IDI for statistical purposes, and is not related to the data's ability to support Inland Revenue's core operational requirements.