Fresh Facts 2023

New Zealand's Fresh Fruit & Vegetable Industry

United Fresh
New Zealand Incorporated

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UNITED FRESH

Our Vision A sustainable fresh fruit and vegetable industry for New Zealand.

Our Mission Connecting the fresh fruit and vegetable value chain by providing services and representation to industry.

Our Story

United Fresh has worked for over three decades to support and unite the fresh fruit and vegetable industry in New Zealand.

Our membership is diverse and representative of the entire value chain, helping to provide interconnectivity throughout.

Our Work

We work collaboratively with stakeholders within New Zealand's fresh produce industry, to ensure the best services are provided, and the most relevant projects are undertaken on behalf of members and the industry.

We have incorporated the United Nations Sustainable Development Goals into our Strategic Plan, to ensure we focus on sustainability throughout all of our projects and partnerships.

Our Technical Advisory Group works in the following areas:

- Biosecurity
- Regulatory compliance including Weights & Measures and Crates & Pallets
- Climate Control & Industrial Gases
- Food Safety & Traceability
- National & International Standards
- International Connectivity
- Supply Chain Management
- Sustainability
- Partnering with the New Zealand Food Safety Science & Research Centre

Further work and benefits for members:

- Workshops, webinars & members' meetings
- Industry research
- Nutrition information panels for all fresh fruit & vegetables
- Health claims interpretation & advice
- Public relations & communications
- Industry support & sponsorship
- Management of the Government-funded Fruit & Vegetables in Schools Initiative
- Funding & support of Women in Horticulture
- Government liaison & submissions
- Funding the education and promotional work of the 5+ A Day Charitable Trust
- Resources for Industry

Visit our website www.unitedfresh.co.nz to find out more and watch our information video. Join us on LinkedIn and @unitedfreshnz on Twitter.

Welcome
to Fresh Facts 2023!

This is the first edition published by United Fresh. If you are holding a printed copy of this edition in your hands, you will see that the physical Fresh Facts format has been retained. It is still the ideal size to fit into a jacket pocket. You will also be able to access an electronic version on the United Fresh website.

Beyond that, there has been change. Changes include:

- We profile more horticultural export crops.
- We now report domestic fresh produce industry data and information as well.
- Fresh Facts will no longer provide data on the viticulture industry or report on apiculture/honey related data. Instead, our focus will increase on those products which are typically sold in supermarket fresh produce departments, greengrocers, and through other channels, where the produce reaches consumers in a "fresh" state.
- The publication date has been shifted from March each year, to September each year. One of the rationales for this change concerns the fact that we want to increase the timing relevancy of credible industry data we include, available from the various annual reports industry sectors, product groups, marketers, and others, published in the winter months.
- Shifting the annual publication month from March to September also make Statistics New Zealand data reported in Fresh Facts more topical in relation to data sets analysed across the Government's financial year structure, which is the 12 months period from 1 July to 30 June.
- Last but not least, in the Southern Hemisphere, September signals the start of spring, the beginning of a new season, the time when nature comes to life and consumer focus re-engages heavily with fresh produce.

The core function of Fresh Facts remains the same. That is: to gather relevant produce industry data, and present it in a consolidated and easy to understand format, that assists stakeholder to improve their knowledge of our industry, and, hopefully, to contribute towards fact-based decision making across the industry.

We would like to acknowledge the efforts of Plant & Food Research, the previous publisher, and the MARTEC team which collated Fresh Facts data sets since 1999, for their efforts in the last 23 years.

We plan to build on their efforts over the coming years, having started with Fresh Facts 2023.

Fresh Facts 2023 has been entirely funded by United Fresh. Any organisation introduced or referred to in this document, other than United Fresh itself, is neither sponsoring the publication, nor advertising in it.

As an industry, it is critical that we generate, circulate and use relevant, accurate and meaningful data, to aid our decision-making processes. Yes, commercial sensitivities and commerce legislation mean that not everything can be shared.

That is, however, no reason why our industry should not be able to find common best practices to data generation, regardless of the differences between crops, for example.

As you get familiar with Fresh Facts 2023, you will notice that the publication provides not only quality data where it is available, but features blank spaces where data ought to have been placed, had it been available!

The Fresh Facts team has also avoided the temptation to reduce gaps in the data shown by generating sets of numbers euphemistically referred to as 'industry estimates'.

We prefer to show the gaps, in the hope that those of you who have access to what we consider missing data will work with us in the leadup to the 2024 edition, to ensure data gaps can be plugged over time.

Similarly, please get in touch if you feel that data pertaining to a product sector you are most familiar with has not been presented accurately within this publication.

Perfection takes practice and we have a long way to go.

We look forward to your feedback.

Kind regards

Dr Hans Maurer

Chair
Technical Advisory Group United Fresh

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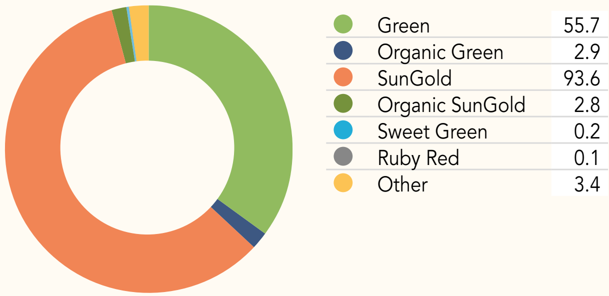
Sector Profile

	2018/19	2019/20	2020/21	2021/22	2022/23
Growers	2,756	2,792	2,813	2,843	2,804
Hectares	12,373	11,650	12,072	13,610	14,512
NZ Export Volume (000) (3.6kg trays sold)	148,843	145,223	158,077	175,033	158,726
OGR/per ha	$96,033	$107,142	$123,041	$124,479	$100,345
Domestic Crop Value					
Export NZ Crop Value (fob)	$2.106 billion	$2.272 billion	$2.599 billion	$2.871 billion	$2.608 billion

Source: Zespri Annual Reports.

New Zealand Grown Kiwifruit Volume by Variety
(3.6kg Trays, 000')



Source: Zespri Annual Report 2022/23.

— Zespri's 2022/23 financial results reflect a challenging period for the kiwifruit industry, with grower returns down on the back of fruit quality issues that have primarily been driven by the industry's severe labour shortage, along with cost increases and supply chain challenges.

— Zespri recorded total global fruit sales revenue of NZ$3.92 billion in 2022/23, down 3 percent on the record result of 2021/22, with global sales volumes down from 201.5 million trays to 183.5 million trays.

— Zespri's Non-New Zealand Supply sales decreased to $519 million, down from $537 million last year. This reflects challenges experienced in Zespri's offshore growing regions, with their Italian growers in particular facing extreme heat and some of the worst quality costs they have experienced in recent years.

Source: Zespri 2022/23 Financial Results Media Release, 30 May 2023.

— New Zealand Kiwifruit Growers Inc. published a very informative free e-book about the New Zealand kiwifruit industry in 2021. Check it out at https://www.nzkgi.org.nz/wp-content/uploads/2022/01/FINAL_WholeBook_Digital.pdf

Kiwifruit

— Zespri has commenced a collaborative marketing programme with Māori Kiwifruit Growers Inc. (https://www.maorikiwifruitgrowers.com/), which will make Māori Kiwifruit Growers Inc. solely responsible for the Hawaiian market.

— Independent kiwifruit marketers can apply for a collaborative marketing arrangement, in order to export their fruit to Zespri markets, or to gain access to new export markets. During the 2022/23 season, Kiwifruit New Zealand Inc. (KNZ) received and approved a total of 24 Collaborative Marketing applications.

— Kiwifruit is imported into Australia under the Compliance-Based Intervention Scheme (CBIS). It is now the most valuable HEA product exported to Australia, increasing 20% to $65.4 million and accounting for 16% by value in 2022.

Zespri New Zealand Grower Returns for 2022/23

Fruit Category	Per Tray 2021/22	Per Tray 2022/23	Per Hectare 2021/22	Per Hectare 2022/23
Zespri Green	$6.35	$5.78	$75,494	$57,636
Zespri Organic Green	$9.74	$8.68	$67,752	$60,912
Zespri SunGold Kiwifruit	$11.51	$9.97	$176,026	$137,524
Zespri Organic SunGold Kiwifruit	$12.61	$12.28	$143,770	$133,548
Zespri Sweet Green	$7.82	$6.87	$54,609	$41,761
Zespri RubyRed Kiwifruit	–	$22.27	–	$42,063

Source: Zespri 2022/23 Financial Results Media Release, 30 May 2023.

— Every 750ha of production equates to approximately 10 million trays of fruit.

— There were appr. 14,500 producing kiwifruit orchards in 2022, which suggests that the average kiwifruit orchard size was just over 5ha, with every orchard on average producing over 66,000 trays.

— Kiwifruit New Zealand Inc. is the independent professional regulator that grants an Export Authorisation to Zespri and considers collaborative kiwifruit marketing applications.

— Collaborative Marketing efforts resulted in 2.8 million trays of kiwifruit being exported, representing $27.8 million in market returns.

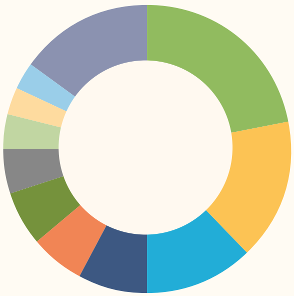
Sources: Zespri Annual Report 2022/23. Kiwifruit New Zealand 2023 Annual Report. Horticulture Export Authority, Kiwifruit Trade Website, accessed 11 July 2023.

Sector Profile

(Year to 31 Dec)[a]	2018/19	2019/20	2020/21	2021/22	2022/23
Growers		264[b]	270	259[b]	
Hectares	10,603	10,838	11,175	11,190	
Packhouses[c]	45	46	46	47	
Exporters[c]	62	61	58	59	
Volume (tonnes)	570,000	590,000	525,000	515,000	
Export Crop	394,729	402,821	357,907	343,229	
Process Crop			117,000[d]		
Domestic Crop			68,000[d]		
OGR / FGR					
Domestic Crop Value					
Export Crop Value (000)	839,000	883,000	823,000	865,000	902,000[e]

Sources: [a] Situation and Outlook for Primary Industries. [b] NZ Apples & Pears Annual Reports. [c] NZ Apples & Pears Data, August 2023. [d] NZ Apples & Pears Submission to the NZ Productivity Commission, December 2021. [e] To year end 31 March 2023.

New Zealand Apple & Pears Export Markets



China	22%
Vietnam	16%
Taiwan	12%
EU (ex UK)	8%
USA	6%
Thailand	6%
Hong Kong	5%
UK	4%
UAE	3%
India	3%
Other	15%

Source: Situation and Outlook for Primary Industries. MPI, June 2023.

— In mid-February 2023, Cyclone Gabrielle caused significant damage in the Hawke's Bay and Gisborne apple-growing region. However, 53% of the Hawke's Bay orchards, amounting to some 4,400 ha of production, were not affected and continued picking, packing, and exporting apples.

— New Zealand's other apple growing regions, Nelson, Marlborough, Central Otago, South Canterbury, and Waikato, were also not affected.

Source: Radio New Zealand interview with NZ Apples & Pears Chair, 6 March 2023.

— Between 2012 and 2020, the NZ apple & pear industry has been expanding in area at a rate of 3.5% Compound Annual Average Growth (CAGR). At the same time, it has been growing at 12.5% CAGR in FOB value.

— At the end of the 2021 calendar year, 13% of the industry's orchards had been planted with "robot ready" structures. This was anticipated to reach 35% of combined orchard land area by 2026.

Source: NZ Apple & Pear Inc. Submission to the Productivity Commission December 2021.

— Total apple exports from New Zealand in March 2023 were valued at $99 million, up $4.4 million from March 2022.

Source: Statistics New Zealand media release, 26 April 2023.

Apples

Building resilience into apple orchards

Scientists are working with the apple industry to try and understand the impacts of Cyclone Gabrielle on apple orchards.

Data have been collected from around 30 orchards across Hawke's Bay, to build an understanding of the issues created by the cyclone, and how growers can best manage their orchards to minimise the impact.

This information will not only be used in the short term to aid in cyclone recovery, but will also feed into long-term plans for resilience to the increased likelihood of extreme weather events as the climate changes.

Source: Plant and Food Research

New Zealand Apple Exports by Variety 2022

Royal Gala	31%
Envy	10%
Braeburn	8%
Jazz	8%
Fuji	8%
Cripps Pink	8%
Pacific Queen	6%
Granny Smith	2%
Other	20%

Source: Apples & Pears New Zealand data, August 2023.

— Over the past 12 months, 62 percent of New Zealand apple exports (by value) were shipped from the port of Napier. The ports of Tauranga and Nelson exported 15 percent and 14 percent, respectively.

Source: Statistics New Zealand media release, 26 April 2023.

— In 2021, 270 apple & pear growers were operating 10,396 ha of orchards across New Zealand, processing their fruit through 49 packhouses, with 402,000 metric tons (MT) of fruit being exported annually, 68,000 MT being sold as fresh fruit in the domestic market and 117,000 MT being sent to processing facilities.

Source: NZ Apple & Pear Inc. Submission to the Productivity Commission December 2021.

— New Zealand's Apple & Pear Industry is future oriented, as evidenced in its National Apples & Pears and Hawke's Bay Horticulture Industry Transformation Plan 2021, available at https://www.productivity.govt.nz/assets/Submission-Documents/immigration-settings/DR-147-NZ-Apples-and-Pears-Incorporated-Horticulture-New-Zealand-Incoporated-Attachment-1.pdf

Sector Profile – Onions

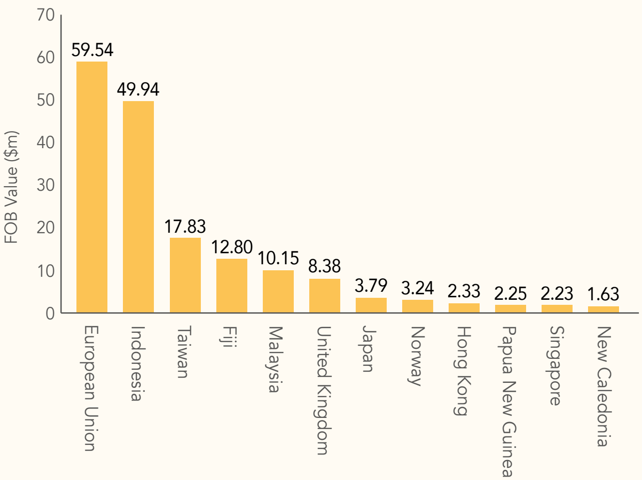
	2018/19	2019/20	2020/21	2021/22	2022/23
Growers	90	85	85	80	75
Hectares	5,271	5,296.4	5,170	4,827	4,571
Export Volume (metric tonnes)	177,000	240,000 (analysis)	208,000 (analysis)	189,000	151,900[a]
OGR/per ha	$34,680	$31,380 (analysis)	$32,147 (analysis)	$32,111 (analysis)	
Domestic Crop Value (000 farm gate)	$32,000	$30,000	$30,000	$34,000	$38,000
Export Crop Value (000 fob)	$170,306	$147,500	$144,600	$125,000	$182,500[a]

Sources: Onions NZ Annual Reports. Fresh Facts analysis based on industry data provided. [a] Statistics New Zealand Infoshare, accessed 10 August 2023.

— There are 75 onion growers in New Zealand, with a combined industry total of 4,571ha of onions planted in 2022.

Source: Onions NZ Facts and Figures, accessed 10 July 2023.

Top Export Destinations 2023



Source: Statistics New Zealand Infoshare, accessed 10 August 2023.

— 90% of the New Zealand Onion crop is exported. In the financial year 1 July 2022 to 30 June 2023, this amounted to 151,900 metric tonnes.

— In the year to March 2023, the New Zealand onion industry exported $143 million worth of onions to 45 countries, and employed 1,050 people.

Source: Onions NZ Media Release, March 2023.

Sector Profile – Buttercup Squash

	2018/19	2019/20	2020/21	2021/22	2022/23
Growers	21[b]	28[b]	28[a]	26[a]	17[b]
Hectares	6430[b]	6530[b]	6,530[a]	5,643[a]	3830[b]
Volume	88,197[a]	88,813[a]	87,170[a]	65,789[a]	32,234[b]
OGR / FGR					
Domestic Crop Value					
Export Crop Value	$58,646,290[a]	$51,455,522[b]	$54,248,695[b]	$52,918,105[b]	

Source: [a] Horticulture Export Authority.
[b] Data provided by Buttercup Squash Product Group.

— Buttercup Squash is a "Recognised Product Group" under the Horticulture Export Authority Act 1987.

— In the 2022/23 season, there were 19 registered squash growers, 8 registered squash packhouses, and 10 registered squash exporters.

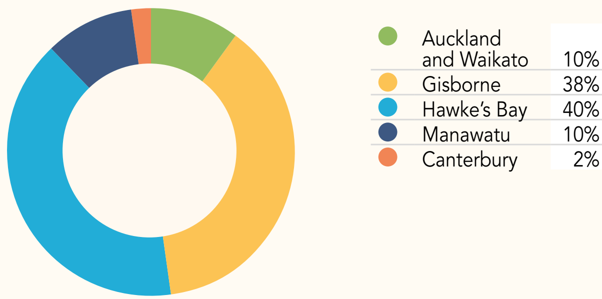
— Japan remains the most valuable market for buttercup squash representing 65% by value, with exports increasing 6% to $34.6 million.

— South Korea is the second largest market representing 22% by value, undergoing a 43% increase to $15.9 million in 2022.

— Japan and South Korea account for 95% of export volumes. Exports to China decreased by 65% from 2020 to 2022, to be worth $2.02 million. The average value for buttercup squash across all markets increased 28%, from $590/tonne in 2020 to $755/tonne in 2022.

Source: Horticulture Export Authority Website, accessed 15 August 2023.

Buttercup Squash Production by Region 2022/23



Source: Buttercup Squash NZ product group website. Accessed 15 August 2023.

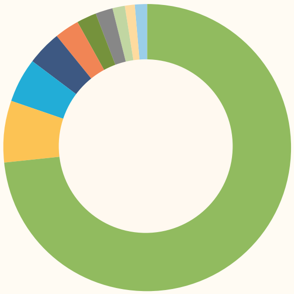
Sector Profile – Avocado

Avocado Industry

	2018/19	2019/20	2020/21	2021/22	2022/23
Growers	969	1,034	1,053	1,039	1,038
Hectares	3,795	3,937	4,145	4,350	4,912
Volume (000) (5.5 kg trays)	5,713	7,105	8,237	8,253	6,906
OGR/per ha (000)	$45.9	$25.7	$42.09	$18.13	$17.72
Domestic Crop Value (000)	$54,537	$50,605	$60,212	$61,867	$55,978
Export Crop Value (fob) (000)	$85,528	$99,167	$167,863	$57,001	$61,496

Source: New Zealand Avocado 2023 Annual Report.

Avocado Export Market Destinations (TEs, 000's)



Australia	73.56%
Hong Kong	6.89%
Thailand	5.08%
Taiwan	3.73%
Korea	2.94%
Singapore	2.07%
India	1.92%
China	1.47%
Other	1.21%
Japan	1.13%

Source: New Zealand Avocado 2023 Annual Report.

- Avocado is a "Recognised Product Group" under the Horticulture Export Authority Act 1987.
- The New Zealand domestic market delivered $55.9 million of sales, on the back of 3.08 million trays fresh and 815,000 trays of process avocados.
- Exports to Asia increased by 143% from 550,000 trays (5.5 kg) in 2020 to 1.34 million trays in 2022.

Regional Planted Area Analysis

Region	2021/22 Planted area (ha)	2021/22 % of area planted	2022/23 Planted area (ha)	2022/23 % of area planted	Change in planted area (ha)	Change in planted area (%)
Far North	957	22%	1,125	23%	+168	+17.6%
Mid North	921	21%	895	18%	-26	-2.8%
Bay of Plenty	2,214	51%	2,514	51%	+300	+13.6%
Rest of NZ	258	6%	378	8%	+120	+46.5%
Total	**4,350**	**100%**	**4,912**	**100%**	**+562**	**+12.9%**

Source: United Fresh industry analysis based on New Zealand Avocado 2023 Annual Report.

Sector Profile – Cherries

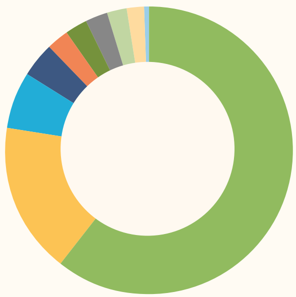
	2018/19	2019/20	2020/21	2021/22	2022/23
Growers	88	98	117	135	144
Hectares	726	950	1,080	1,190	1,250
Average Price/kg. across export and domestic	$21	$17	$16	$20	$17
Export Volume (tonnes)[a]	2,682	2,171	2,508	3,219	3,594
Domestic Volume (tonnes)	1,276	2,550	2,480	2,188	3,053
Total Volume (tonnes)	3,958	4,721	4,989	5,407	6,647
Domestic Value ($m)	$11.193	$19.890	$25.797	$22.488	$27.816
Export Value ($m)	$70.690	$60.017	$54.727	$83.220	$83.029
Total Value ($m)	**$81.873**	**$79.907**	**$80.524**	**$105.709**	**$110.845**

Source: Summerfruit NZ Product Group.

- Summerfruit is a "Recognised Product Group" under the Horticulture Export Authority Act 1987.
- Cherry exports volumes during the 2022/23 season equate to 54% of the total cherry crop. The remaining 46% of cherries were sold in the New Zealand domestic market. These volumes, respectively, represent 75% and 25% of the total value generated by the cherry crop.
- Cherry exports represent 71% of all summerfruit tariff value, largely due to a 0.8% tariff into Japan, which will phase down to zero for the 2023/24 season under CPTPP, and a 30% tariff into India. Exports into India represent only 0.02% of FOB value, but contribute 25% of the tariff costs for cherries. There are no tariffs on cherries into the China and Taiwan markets.

Source: Horticulture Export Authority Summerfruit Trade page, accessed 29 May 2023.

Top 10 Cherry Export Destinations for 2022 ($)



Taiwan	36,963,774
Vietnam	10,528,979
Thailand	3,944,893
USA	2,362,626
China	1,521,815
Singapore	1,462,498
Japan	1,458,165
Philippines	1,374,249
Hong Kong	1,180,843
Malaysia	219,332

Source: Horticulture Export Authority Summerfruit Trade page, accessed 29 May 2023.

- Collectively the top three markets, Taiwan, China, and Vietnam, account for 81% by value of all cherry exports.
- The average cherry export value in 2022 was $20,805/tonne.

Sector Profile – Potatoes

New Zealand Potato Industry

	2018/19	2019/20	2020/21	2021/22	2022/23
Growers			172	172	176
Area (ha)	**10,344**	**10,417**	**9,775**	**8,951**	**8,424**
Seed	*1,160*	*1,117*	*1,075*	*951*	*850*
Table	*3,278*	*3,300*	*3,200*	*3,000*	*3,671*
Processed	*5,906*	*6,000*	*5,500*	*5,000*	*3,903*
Production (MT)	**527,190**	**533,030**	**497,634**	**456,072**	**419,200**
Seed	*22,042*	*21,230*	*20,434*	*18,072*	*16,150*
Table	*150,788*	*151,800*	*147,200*	*138,000*	*168,855*
Processed	*354,360*	*360,000*	*330,000*	*300,000*	*234,194*
Total Value ($000)	**$1,040,600**	**$1,087,871**	**$1,160,000**	**$1,094,996**	**$931,297**
Seed	*$17,642*	*$16,988*	*$16,345*	*$14,447*	*$13,078*
Table	*$254,597*	*$243,099*	*$284,429*	*$284,951*	*$319,377*
Crisps	*$200,016*	*$217,561*	*$244,254*	*$249,458*	*$274,316*
Frozen/Fries	*$568,354*	*$610,223*	*$615,667*	*$539,296*	*$324,526*
Domestic Value ($000)	**$911,313**	**$959,659**	**$1,054,857**	**$993,447**	**$814,350**
Seed	*$17,613*	*$16,962*	*$16,327*	*$14,435*	*$12,548*
Table	*$231,688*	*$222,325*	*$264,413*	*$264,413*	*$292,783*
Crisps	*$195,332*	*$211,779*	*$237,411*	*$249,458*	*$266,372*
Frozen/Fries	*$466,681*	*$508,592*	*$536,707*	*$465,141*	*$242,647*
Export Value ($000)	**$129,295**	**$128,211**	**$105,838**	**$101,549**	**$116,946**
Seed	*$29*	*$25*	*$18*	*$11*	*$530*
Table	*$22,909*	*$20,774*	*$20,016*	*$20,539*	*$26,593*
Crisps	*$4,684*	*$5,781*	*$6,844*	*$6,844*	*$7,943*
Frozen/Fries	*$101,673*	*$101,631*	*$78,960*	*$74,156*	*$81,880*

Source: Potatoes NZ Annual Reports.

- The top 3 potato producing regions in New Zealand are Canterbury/Westland, Auckland, and Manawatu. The domestic value of the New Zealand table potato sector comprises 36% of the total domestic potato sector value.
- Domestically consumed processed (crisps) and frozen/fries potatoes make up 62.5% of the total domestic industry value in 2023.
- The export market accounts for 12.5% of total potato industry value for 2023, which is an increase from 8.3% in 2022.
- Planted area has dropped 18.6% between 2018 and 2023, a loss of 1,920 ha.
- Total annual potato production has reduced by 107,990 tonnes between 2018 and 2023, a decrease of 20.5%.
- Domestically produced frozen/fries have dropped in value between 2018 and 2023, from $466.681 million, to $242.647 million, a decrease of 48%.

Source: United Fresh industry analysis based on Potato New Zealand Annual Reports.

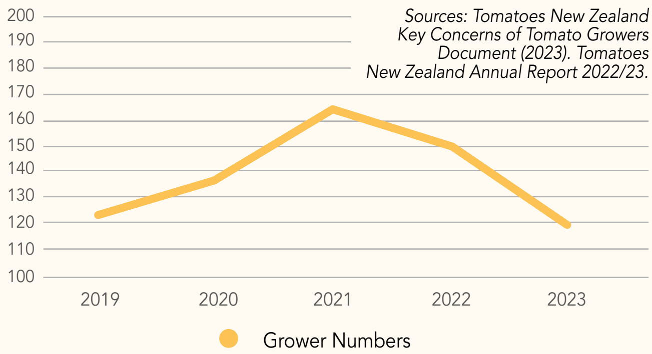
Sector Profile – Tomatoes

	2018/19	2019/20	2020/21	2021/22	2022/23
Growers	123	137	164	150	~120
Hectares					80[a]
Volume					
OGR / FGR Total ($m)				$159 .0	$168.2
Domestic Crop Value ($m)	$124.3	$127.8	$108.1	No longer reported	No longer reported
Export Crop Value (fob, $m)	$10.33	$12.2	$7.12	$2.5	$3.88

Sources: Tomatoes New Zealand Annual Reports. Tomatoes New Zealand Key Concerns of Tomato Growers Document (2023). a Statistics NZ Agricultural Production Census 2022.

- Tomatoes New Zealand is focused on undercover tomato production.
- Tomatoes NZ states that a total of 309 ha of land is being used for all undercover crops, including 80 ha of tomatoes. The 309 ha of total undercover crops break down into 18% being occupied by small sized greenhouses (<1 ha), 45% occupied by medium sized greenhouses (>1 to <5 ha), and 37% occupied by large greenhouse complexes (>5 ha).
- Tomatoes NZ is expressing concerns about the number of small to medium grower numbers having stopped growing tomatoes in the last 4 years.
- The average CPI based retail price ($/kg) between Nov 2022 – Mar 2023 was reported by Tomatoes NZ as $8.88.
- The CIF value of tomato imports is reported as $1.31 million, for the financial year 2022/23, compared to $2 million for the 2021/22 financial year.
- The last exports to Australia occurred in February 2021. In 2020, 587 tonnes of tomatoes were exported to Australia. In 2021 this was down to 44 tonnes, and in 2022, zero tonnes were exported due to biosecurity incursions limiting access.

Fluctuating Tomato Grower Numbers Reported



Other Fresh Fruit

	Grower Number	Planted Area (ha)[c]	Crop Volume (tonnes)	Sales Value for 2023 ($m)	
				Dom	Exp[c]
Berryfruit					33.97
Blueberries	98[f]	682[f]	3035.45[f]		31.21
Boysenberries[a]	19	206	2,700		0.00
Other berryfruits					0.07
Raspberries		92			0.04
Strawberries	120	163	9,000[g]		2.65
Citrus[d]	316	1,660	30,000	60.20	7.98
Grapefruit[d]	18	15	370	0.70	0.05
Lemons[d]	75	257	7,000	10.80	6.44
Limes[d]	47	27	712	2.70	0.11
Mandarins[d]	192	556	10,920	28.00	0.75
Oranges[d]	176	783	10,100	16.60	0.62
Tangelos[d]	28	22	637	1.00	0.01
Feijoas	140	190			0.13
Kiwiberries	25	220[a]			4.24
Melon			182		0.68
Nashi					0.04
Passionfruit	50	16			0.23
Pears		308			7.24
Persimmons	30	127	2,300[a]		8.99
Summerfruit (excl. Cherries)	231	1,160	11,449	52.18	0.55
Apricots	45	348	1,893	7.56	0.32
Nectarines	51	290	4,653	22.25	0.03
Peaches	67	299	2,998	13.80	0.15
Plums	68	223	1,905	8.57	0.05
Tamarillos	30	72			0.06
Other Fruit					0.48
Total Fresh Fruit					**64.59**

Sources: [a] Horticulture Export Authority, accessed on 03 July 2023. [b] New Zealand Agricultural Production Census, accessed on 30 May 2023. [c] Statistics New Zealand Infoshare, accessed on 7 August 2023. [d] Product Group website, accessed on 30 May 2023. [e] Strawberry Growers NZ Annual Report 2022, accessed on 30 May 2023. [f] Blueberry NZ June 2023 Newsletter, accessed on 13 June 2023. [g] Strawberry Growers NZ Industry Information Website, accessed on 7 July 2023.

In July 2020, the Ministry for Business, Industries and Employment (MBIE) published "Opportunities in the New Zealand Blueberries Industry".

https://www.mbie.govt.nz/dmsdocument/11670-opportunities-in-the-new-zealand-blueberries -industry

This report is not only still relevant for anyone wanting to understand the blueberry industry's potential, but also serves as a reference model for analysing any other emerging fruit crop with significant export potential.

Processed Fruit

	Export (fob, $m) 2023
Apple juice	15.09
Avocado oil	8.55
Blackcurrant concentrate	1.64
Dried fruits	7.21
Frozen fruits	22.47
Blackcurrants	13.76
Blueberries	0.29
Boysenberries	2.65
Kiwifruit	4.23
Raspberries	0.14
Other	1.42
Fruit preparations	25.73
Apples	2.73
Blackcurrants	0.70
Fruit mixture prep	18.78
Kiwifruit	0.42
Pears	0.21
Other	2.89
Jams, jellies and purees	57.51
Other fermented beverages	7.07
Other fruit juices	5.11
Total Processed Fruit	**150.38**

Source: Statistics New Zealand Infoshare, accessed on 8 August 2023.

— This table is focused on the key categories of processed fruit. Space constraints prevent further breaking out the "Dried Fruits", "Jams", and "Other" categories. Boysenberries and blackcurrants, for example, will also be found contributing to the "Jams" and "Other" categories.

— Boysenberries are generally exported as block frozen fruit, individually quick frozen (IQF) fruit, puree, or concentrate. HEA reports total processed boysenberry exports, across all categories, of $3.6 million in 2022.

— New Zealand is the largest Southern Hemisphere supplier of blackcurrants, and amounts for approximately 5% of world production. Blackcurrant exports had a combined value of $11.6 million in 2022. Frozen concentrate and IQF blackcurrants decreased 84% and 4% respectively, while there was almost a five-fold increase in the value of 'other' blackcurrants to almost $7 million over this period. The blackcurrant industry is now focusing on the global nutraceutical market.

Source: Horticulture Export Authority Trade Access section, accessed 20 August 2023.

— Up to 10% of the New Zealand avocado crop is sold for processing, mostly to make avocado oil.

Source: New Zealand Avocado Website. Accessed 20 August 2023.

Fresh Vegetables

Vegetables New Zealand states that the Fresh Vegetables category consists of more than 55 crops, with a farm gate value of over $420 million per annum, produced by approximately 760 growers. Not included in this data are potatoes, onions, tomatoes, asparagus, and buttercup squash.

Source: www.freshvegetables.co.nz. Accessed 17 August 2023.

Due to the complexities of vegetable production, capturing accurate data on an ongoing basis is challenging.

In 2017, Horticulture New Zealand commissioned a KPMG report that analysed New Zealand's domestic vegetable production. The report focused on 10 key vegetables that are staples of the kiwi diet.

10 Key Vegetables that are Staples of the Kiwi Diet (2017)

Product	Volume Produced (tonnes)	Average Retail Price ($ per kg)
Broccoli	49,000	6.36
Cauliflower		4.02
Kūmara	22,000	4.22
Onion	211,510	2.26
Carrot	159,000	2.26
Parsnip		5.43
Cabbage	56,000	2.12
Lettuce	8,400	4.98
Potatoes	525,000	1.83
Tomatoes	102,900	5.97

Sources: KPMG, New Zealand Domestic Vegetable Production: The Growing Story (2017).

(https://www.hortnz.co.nz/assets/Environment/National-Env-Policy/JR-Reference-Documents-/KPMG-2017-NZ-domestic-vegeable-production-.pdf)

- Reports of this nature are critical to guiding quality decision making.
- There has been considerable change since 2017. Vegetables New Zealand Inc. is keen to update the report, and should be commended for this. In the meantime, the 2017 report is the most accurate dataset available to the domestic vegetable industry.

Processed Vegetables (excl. potatoes)

	Growers	Planted Area (ha)	Crop Volume (tonnes)[b]	Domestic value 2023 ($m)	Export Value 2023 (FOB, $m)[a]
Beans			17,500		$50.67
Beetroot			22,000		$19.14
Carrots			88,000		$2.59
Peas			58,500		$140.16
Sweetcorn			77,000		$26.55
Tomatoes (excl. tomato juice & sauces)					$4.58
Other Dried Vegetables[c]					$26.52
Other Vegetable preps					$10.29
Vegetable juices (incl. tomato juice)[d]					$38.65[c]
Other Vegetables					$48.28
Total[e]					**369.72**

Source: [a] Infoshare Harmonised Export Data, accessed 8 August 2023. [b] Process Vegetables NZ Website, accessed 12 July 2023. [c] Includes dried corn previously recorded as part of the sweetcorn category. [d] Previous Fresh Fact editions separately listed a value for carrot juice, but identified it as "Authors' estimate". Statistics NZ does not break the vegetable juice category down to single identified product level. [e] Unlike previous Fresh Facts editions, this table does not include potatoes. For potato data, see page 12.

- Key process vegetable growing regions are Gisborne, Hawke's Bay, Marlborough, and Canterbury.
- Process Vegetables New Zealand Inc. states that they represent 350 commercial process vegetable growers on crop related issues, with their members mainly growing carrots, sweetcorn, peas, beans, and beetroot. Minor crops grown include kūmara (sweet potato), cauliflower, and broccoli.
- The farm gate value of processed vegetables represented by Process Vegetables NZ Inc., which excludes potatoes, for the year ended 31 March 2023, was $53.40 million, based on levy income.

Sources: Process Vegetables NZ Annual Report 2023, accessed 31 July 2023. Process Vegetables NZ Inc. Website, accessed 20 August 2023. Vegetables New Zealand Annual Report 2023, accessed 31 July 2023.

- The export value for processed peas ($140.16 million) compares to $115.4 million reported in Fresh Facts 2020, an increase of 21.5%.
- Processed beetroot exports declined from $24.1 million in 2020, to $19.14 million in 2022, a decrease of 20.6%. Australia accounted for 97% of processed beetroot exports for 2023.
- Watties Hastings factory processes over 30,000 tonnes of locally grown outdoor tomatoes annually, accounting for the content of over 90% of the canned tomatoes Watties sells each year. The balance of 10% is imported from Italy.

Source: Watties Website, accessed 22 August 2023.

Flowers, Plants, Seeds, and other Products

Exports of Flowers, Plants, Seeds and other Products ($ million, fob)

	2019	2020	2021	2022	2023
Cut Flowers					
Chrysanthemums	0.07	0.03	0	0	0
Hydrangeas	1.26	1.16	0.91	0.79	0.63
Liliums	0.11	0.07	0	0.01	0.01
Nerines	0.04	0.01	0.01	0.02	0.01
Orchids	10.89	9.17	6.62	7.97	8.39
Paeonies	3.07	2.80	2.69	2.98	2.76
Pittosporums	0.40	0.38	0.48	0.48	0.40
Protaeceae	0.40	0.25	0.23	0.19	0.19
Sandersonias	0.11	0.06	0.11		
Zantedeschias (calla lily)	0.28	0.17	0.09	0.09	0.02
Other foliage	5.29	4.70	5.05	0.23	0.08
Other cut flowers	3.23	4.27	0.78	0.68	0.94
Cut Flowers subtotal	**$25.15**	**$23.07**	**$16.97**	**$13.44**	**$13.43**
Plants					
Other live plants	4.18	3.39	2.61	5.00	0.13
Edible plant parts	2.21	4.09	2.22	4.46	5.19
Seeds					
Flower seeds	0.11	0.40	0.34	0.62	0.71
Fruit seeds	1.00	1.99	1.03	0.89	0.97
Cabbage seeds	3.98	3.48	2.74	1.80	2.25
Carrot seeds	21.82	33.22	25.74	15.70	21.68
Onion seeds	2.58	2.67	4.70	1.71	0.41
Radish seeds	25.02	40.52	26.23	32.38	36.86
Silverbeet seeds	3.15	1.06	3.34	2.95	6.50
Other veg. seeds	30.54	31.32	26.57	31.29	34.47
Tree seeds	2.00	1.47	1.88	2.28	2.30
Seeds subtotal	**$90.2**	**$116.13**	**$92.57**	**$89.62**	**$106.15**
Bulbs, tubers, corms					
Liliums	24.41	25.85	20.55	24.78	20.13
Sandersonias	0.30	0.65	0.09	0.12	0.08
Tulips	17.43	15.32	15.67	18.96	20.79
Zantedeschias (calla lily)	0.03	0.02	0.02		
Others	0.62	0.20	0.19	0.03	0.66
Sphagnum moss (fresh)	0.31	0.06		0.06	0.01
Total	**$164.84**	**$188.78**	**$150.89**	**$156.47**	**$166.57**

Source: New Zealand Statistics Harmonised Trade Exports, accessed 8 August 2023.

- Pre-Covid cut flower exports amounted to $25.15 million for the year ended June 2019. The cut flower industry has yet to regain those levels, based on 2023 data.
- The Seeds sector showed resilience during the Covid period, and accounts for 63.7% of 2023 exports.
- In 2016, the Netherlands Ministry of Foreign Affairs commissioned a New Zealand Seed Sector Profile! This can be found at www.rvo.nl/sites/default/files/2017/11/nz-seed-sector-profile.pdf

Returnable Plastic Crates (RPCs)

- RPCs have been a feature of the domestic produce industry since 1991. Without RPCs, moving fresh produce through the supply chain would be even more complex than it is already.
- RPCs are one of the often-ignored success stories when it comes to fresh produce value chains' engagement with Sustainability values and principles.

RPC Providers

Chep

www.chep.com/nz

CHEP A Brambles Company

Loscam

www.loscam.com/en/products/fresh-produce-crates-anz

LOSCAM

Viscount FCC

www.viscountfcc.co.nz

Viscount FCC

In June 2022, United Fresh published a Research & Knowledge Compilation Document related to RPCs, in connection with Virus management.

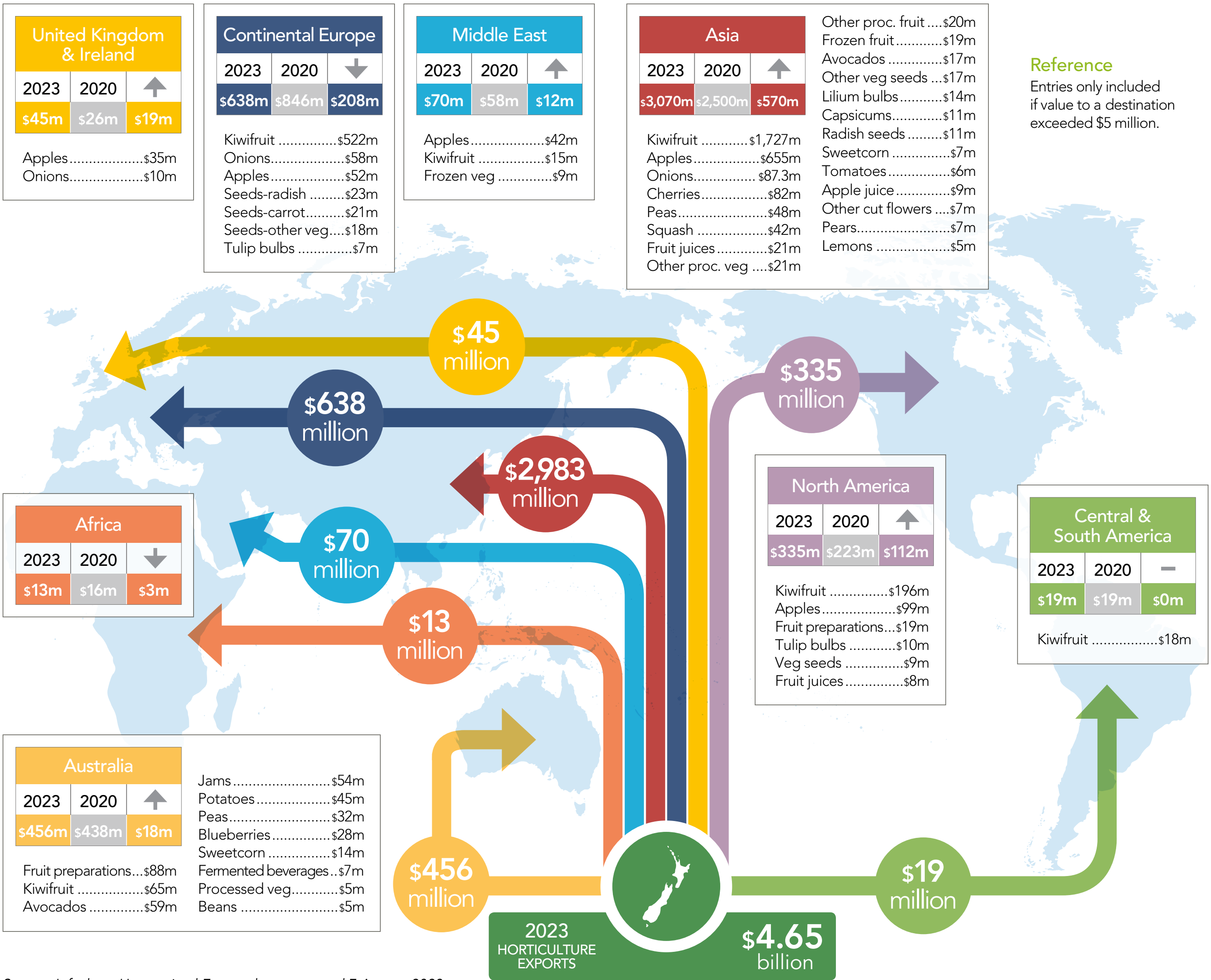
The document contained three major recommendations:

- United Fresh encourages its crate hire pool company members issuing RPCs in this country to share their biosecurity and food safety risk mitigation plans with other United Fresh members.
- The three crates hire pool companies operating in New Zealand should be requested to operate their facilities to the DIN 10522:2006-01 Standard, or equivalent.
- Organisations with their own internal crate pools should review their RPC washing and hygiene monitoring practices.

The full Compilation Document can be downloaded from:

https://unitedfresh.co.nz/assets/site/assets/TAG/United-Fresh-Research---Knowledge-Compilation---RPC---June-2022.pdf

Export Destinations



Source: Infoshare Harmonised Export data, accessed 7 August 2023.

— The United Kingdom ranked in 8th position (4%) amongst the top 10 export markets for NZ apples and pears, but does not feature at all in the top 10 market destinations for NZ kiwifruit.

— Fresh vegetable exports (including onions, squash, capsicum, and potatoes) amounted to $355 million for the year ending 31 March 2023.

— New Zealand's largest export markets for fresh & processed vegetables combined were Australia (29%), followed by Japan (19%), Fiji (7%), and the EU (7%).

— Fresh avocado exports to Australia reduced by 2.2 million trays (4%), due to that country's ongoing domestic market oversupply. This trend is expected to continue.

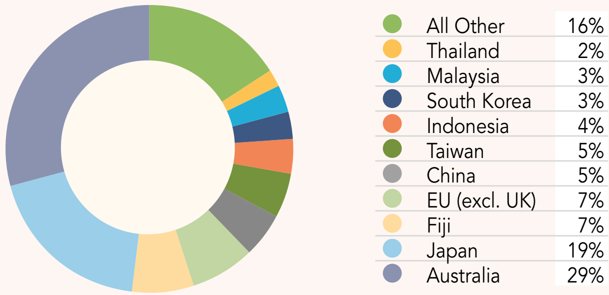
Source: Situation and Outlook for Primary Industries. MPI, June 2023.

Export Profile – Horticultural Exports

— New Zealand exported 962,500 tonnes of fresh fruit in 2019. In 2020, fresh vegetable export tonnage amounted to 569,800 tonnes.

Source: Submission on Freight & Supply Chain Strategy, Horticulture New Zealand, June 2022.

Top Export Markets for Fresh and Processed Vegetables
(Year to 31 March 2023, %)



Source: MPI Situation and Outlook for Primary Industries (June 2023).

— East and South-East Asia take around 30% of New Zealand's fruit exports. Included in these regions are key export markets Japan, South Korea, and Vietnam.

— In 2021, kiwifruit amounted to just over 75% of New Zealand's fruit exports to the region, followed by apples (19%), avocado (1.5%), and cherries (1.2%).

— The value of New Zealand fruit exports to Vietnam grew more than 500% between 2015 ($24.7 million) and 2020 ($130.2 million). The key crop in this success story was apples.

Source: New Zealand Trade and Enterprise, https://my.nzte.govt.nz/resource-library. Accessed 20 August 2023.

— The calendar year 2022 provided mixed results for New Zealand fruit exports. Green kiwifruit sales fell by $220 million in value, to $707.5 million, compared to 2021. Gold kiwifruit export values, however, rose by $80 million year-on-year, to $1.93 billion.

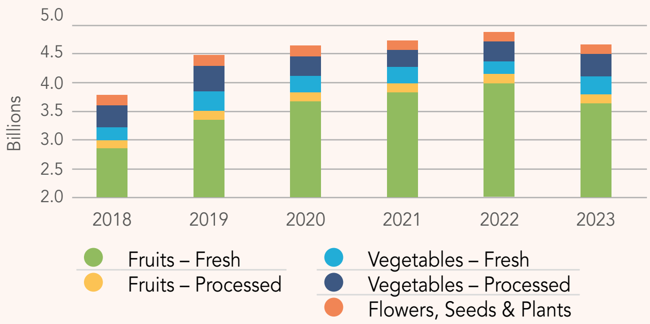
— Avocado sales fell by $31 million (28%) for the same period. Apple export values increased by 6.6% to $889 million.

— Vegetable exports were also affected. Buttercup squash export values reduced by 22%, and onions by 11%. Partially offsetting these falls was a rise in potato export value by 40%, increasing by $7.5 million.

Source: Statistics New Zealand Media Release, 30 January 2023.

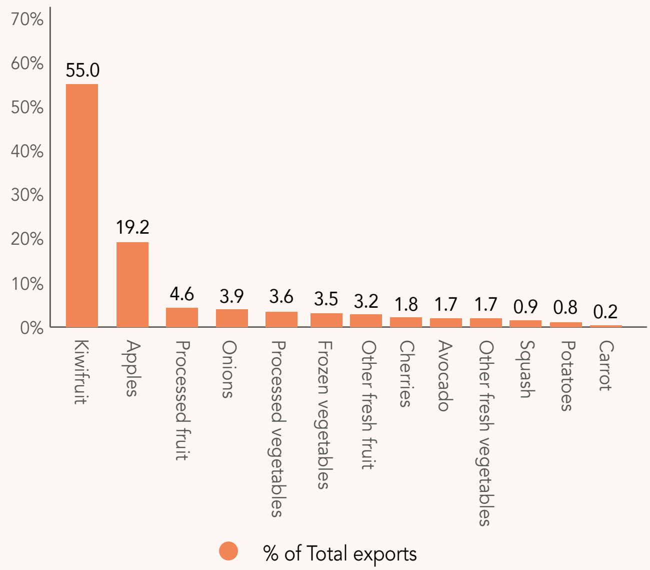
Horticultural Exports

Annual Exports (1 July - 30 June Years; $ million, fob)



Source: Infoshare Harmonised Export Data, accessed 7 August 2023.

Fruit & Vegetable Exports (1 July 2022 – 30 June 2023)



Source: Infoshare Harmonised Export Data, accessed 7 August 2023.

— Almost three quarters of New Zealand's fresh produce export value is generated from the export of kiwifruit and apples, which represent 74.2% of the value of those export categories that exceed 0.1% of total export value.

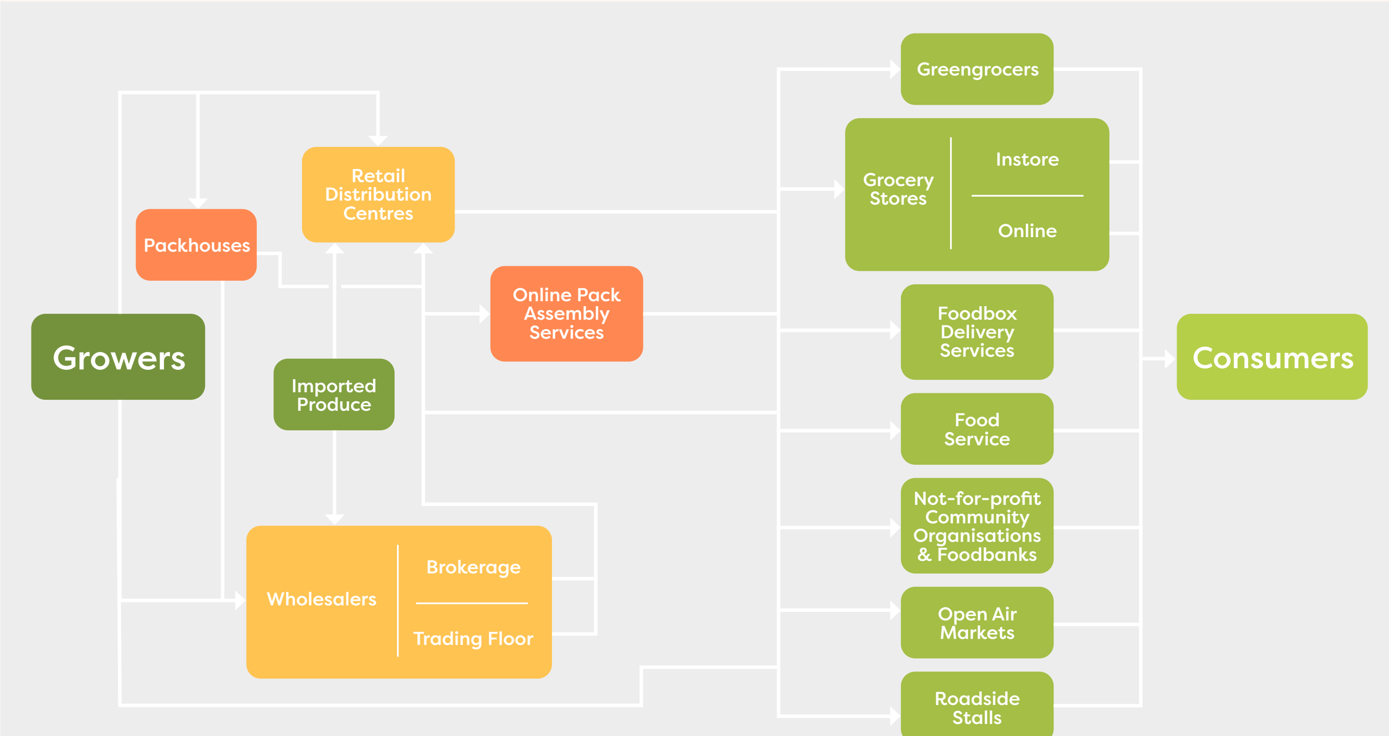
New Zealand Domestic Fresh Produce Supply Chain

- Total fresh produce VFD import values amounted to $260 million for the year ended 30 June 2023.
- Banana VFD import values represented $83.8 million (32%) for the year ended 30 June 2023.

Source: Infoshare Harmonised Export Data, accessed 7 August 2023.

- Statistics New Zealand estimates the country's population in 2023 at around 5.15 million.
- The New Zealand domestic fresh produce value chain will need to cater for around 5.92 million people by 2043.
- This represents an average 0.6% growth rate each year, which as an industry we need to build into our demand forecast models.

Source: Statistics New Zealand National population projections: 2022(base)-2073.

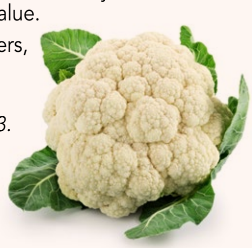


- The farm gate value for all fresh produce affiliated with Horticulture New Zealand, based on the Commodity Levies (Vegetables and Fruit) Order 2019, and levy income reported by HortNZ, amounts to up to $3.83 billion.
- 3700 fruit and vegetable growers use assurance programmes NZGAP or Global GAP.
- 54 packhouses, 20 transport companies, and 52 wholesaler sites have NZGAP Supply Chain Certification.

Source: Commodity Levies (Vegetables and Fruit) Order 2019, Horticulture New Zealand Annual Report 2023, Aotearoa Horticulture Action Plan - Strategy. Growing Together 2035 (Feb 2023), NZGAP Activity Report 2022.

- The six key produce wholesalers have all achieved levels of various integration with growing and packhouse operations.
- The ability to survive as a produce wholesaler is directly linked to a wholesaler's ability to add innovative value.
- Produce enters retail channels via wholesalers, trading floors, or direct delivery to retailer distribution centres.

Source: United Fresh industry analysis August 2023.

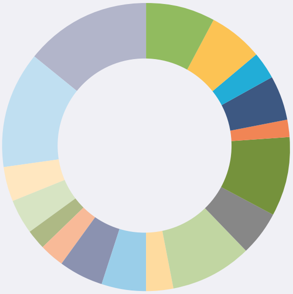


Fresh Produce Retail Sector
Sector Overview

Domestic consumers can buy fruits and vegetables across New Zealand from:

— About 650 supermarket produce departments.
— A multitude of fruiterers and green grocers.
— 25 open-air farmers' markets.
— An unknown number of convenience stores, temporary road-side stalls, and farm gate locations.
— Range on offer can vary but a full-service supermarket typically carries between 250-300 produce stock keeping units (SKU).
— Produce department sales represent, on average, 8-10% of total store sales.
— Bananas typically represent 8-9% of produce department sales.
— In 2019, Statistics New Zealand's Triennial Household Expenditure Survey determined the average New Zealand household spent $23.50 per week on fruit and vegetables.

Fruit & Vegetable Key Product Categories – Produce department sales (%)



Bananas	8%
Apples	6%
Oranges	3%
Grapes	5%
Kiwifruit	2%
Potatoes	9%
Onions	5%
Tomatoes	9%
Lettuce	3%
Mushrooms	5%
Broccoli, cabbage & cauliflower	5%
Kūmara	3%
Pineapple	2%
Summerfruit	4%
Berryfruit	4%
Other fruit	13%
Other vegetables	14%

— The average wastage produce departments experience can be in the region of 5% of produce department retail value.

Source: United Fresh industry analysis, August 2023.

Major Supermarket Retailers

Foodstuffs South Island
https://www.foodstuffs-si.co.nz/

Foodstuffs North Island
https://www.foodstuffs.co.nz/

Countdown Supermarkets
https://www.countdown.co.nz/info/about-us/about-woolworths-nz

Fresh Choice Supermarkets
https://www.freshchoice.co.nz/

— Foodstuffs South Island operates a dedicated produce distribution centre and transacts its business through the markets, as well as direct from grower/packers.
— Foodstuffs North Island operates a dedicated produce distribution centre in Auckland, that supplies all stores between Kaitaia and Taupo. Stores south of Taupo are serviced from distribution centres in Palmerston North and Wellington. Produce purchases are transacted through the markets, as well as direct from grower/packers.
— Countdown operates two dedicated produce distribution centres, in Auckland and Christchurch, covering respectively the North and South Islands. Produce is typically purchased direct from grower/packers, and all stores receive their produce via the distribution centres.
— Fresh Choice does not operate a dedicated produce distribution centre, and currently transacts its business through the markets.
— Some stores allow for direct into store deliveries, where this fits the needs of seasonal produce, e.g., Hawke's Bay peaches being delivered directly into Napier stores, rather than shipped via Auckland or Wellington.

Source: United Fresh industry analysis, August 2023.

Fresh Produce Wholesale Sector
Sector Overview

- **T&G Fresh Ltd** has its origin in the efforts of English immigrant Edward Turner, who established Turners & Growers as a fruit & vegetable wholesale business in Auckland. More than 125 years later, T&G Fresh operates throughout New Zealand. T&G Fresh is also a significant glasshouse tomato, citrus, and blueberry grower. Parent company T&G Global is a substantial apple exporter, owned by the German BayWa Group.
- **MG Fresh Produce Group** celebrates its 100th birthday in 2023. The business started in Wellington, when several local market gardeners decided to compete with existing wholesalers, using the co-operative model. MG Fresh Produce Group today is vertically integrated, with a focus on tomatoes, citrus, strawberries, capsicum, and green leafy vegetable crops. The company is also one of the largest banana importers.
- **Primor Produce Ltd** started operating in the late 1980s, selling kiwifruit in the domestic market, and importing premium Australian citrus. Today, Primor is also a large avocado exporter, and counts a substantial avocado and kiwifruit grower/packer amongst its shareholders.
- **Fresh Direct Ltd** is a privately held produce & cut flowers wholesale business, started in the 1990s. It is owned and operated by two great-grandsons of the Edward Turner who started Turners & Growers.
- **Seeka Ltd** has its origin in the 1980s kiwifruit industry, where the company has evolved into one of the largest kiwifruit growers. Seeka has expanded into banana importing & ripening, importing other fruit such as pineapple, and wholesaling produce through SeekaFresh.
- **Carter & Spencer Group Ltd** is based in Queensland, but operates as a fresh produce importer and wholesaler in the New Zealand market, out of its Auckland base. The Carter & Spencer Group is a privately owned family business, that started in Brisbane in the mid-1930s. In addition to the Brisbane wholesale operation, the group has expanded into fruit and vegetable production, growing sweet potatoes, pineapple, ginger, and citrus, among other crops. The company also has a sourcing office in California.
- These days, the boundaries between growers, packers, wholesalers, and retailers, are becoming blurred. Wholesalers, as mentioned above, are vertically integrating with growing and packing operations, retailers are, in part, acting as their own importer, and, the traditional wholesale model is no longer the supply channel of choice for major grocery retailers.

Source: United Fresh industry analysis, August 2023.

Sector Participants and Contact Details
(UF Members)

T&G Fresh
https://tandg.global/tandg-fresh/

MG Fresh Produce Group
https://www.mggroup.co.nz/

Primor
https://primor.co.nz/

Fresh Direct
https://www.freshdirect.co.nz/

Seeka
https://www.seeka.co.nz/

Carter & Spencer
https://www.carter-spencer.com.au/

Import Sector

Fresh Produce Import Statistics

Fruit	Quantity (Tonnes)	2022/23 Imports (VFD, $ m)
Bananas	81,749.19	83.80
Grapes	10,463.20	56.52
Pineapples	9,254.82	12.27
Citrus	13,925.43	29.86
Oranges	8,339.14	16.65
Mandarins	6,343.80	15.93
Lemons	1,061.07	3.73
Limes	153.29	1.67
Grapefruits	159.08	0.37
Tangelos	157.09	0.27
Mangoes	3,003.11	10.23
Pears	3,671.49	7.22
Strawberries	319.51	3.39
Papaya	812.93	2.37
Watermelons	873.02	2.31
Kiwifruit	600.53	2.04
Other Melons	691.25	1.94
Jackfruit & Lychees	129.05	1.78
Coconuts	933.91	1.61
Durians	25.87	0.54
Apples	58.59	0.52
Plantains	24.11	0.32
Cherries	15.12	0.27
Plums	33.32	0.23
Nectarines	22.35	0.17
Peaches	14.95	0.11
Vegetables	Quantity (Tonnes)	2022/23 Imports (VFD, $ m)
Garlic	3,753.38	8.89
Beans	1,321.33	8.08
Onions	1,033	2.46
Squash	618.18	2.12
Aubergines	284.39	1.46
Tomatoes	310.88	1.42
Capsicums	198.77	1.11
Lettuce	99.6	0.41
Peas	24.28	0.39
Cabbage	94.80	0.37
Pumpkins	91.86	0.19
Sweetcorn	14.90	0.15
Asparagus	7.91	0.08
Total Fresh Fruits & Vegetables	**68,559.86**	**$260.82**

Source: Infoshare Harmonised Import Data, accessed 7 August 2023.

— In 2022, NZ imported a total of 319 tonnes of fresh strawberries, valued at $3.39 million, entirely from Australia. This volume represents 4% of the total crop volume produced in NZ.

— Imported tomato volumes are monitored by Tomatoes NZ, as they can have significant import on domestic values.

— NZ has no table grape industry and is reliant on imports. Grape imports come primarily from Australia at $23.2 million (41.1%), the United States with $22.4 million (39.6%), Peru with $6.1 million (10.8%), and Chile with $3.2 million (5.7%).

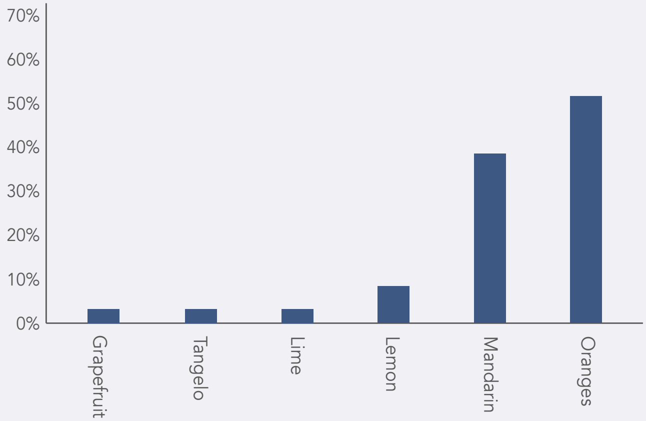
— Garlic imports from China make up 82.3% ($7.3 million) of imports, with the other significant country for imports being the United States at 17.4% ($1.5 million).

— Kiwifruit imports come exclusively from Italy.

Source: United Fresh industry analysis, August 2023.

Import Sector

2022/2023 Citrus Import Volume by Category (%)



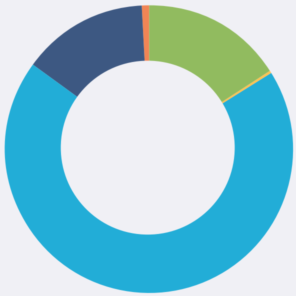
Source: Infoshare Harmonised Imports Data, accessed 7 August 2023.

— New Zealand sources the bulk of its imported citrus from Australia (54%) and the USA (43%). The remaining 3% were shown as being imported from other countries in commercially insignificant volumes.

— USA oranges imported into New Zealand are grown either in California or Arizona.

— Lemon imports into New Zealand are almost entirely sourced from the USA (99.2%).

2022/2023 Banana Import Volume by Country of Origin



Philippines	16.00%
Other	0.09%
Ecuador	69.06%
Mexico	14.56%
Panama	0.29%

Source: Infoshare Harmonised Imports Data, accessed 7 August 2023.

— The VFD value of banana imports by country is as follows: Ecuador ($57.62 million), Philippines ($14.01 million), Mexico ($11.78 million), Panama ($0.26 million), and other countries ($0.05 million).

— New Zealand does not import any bananas from Australia.

— The 81.75 million kg of imported bananas for the year ending 30 June 2023 equates to 4.54 million 18kg Tray Carton Equivalents (TCE). The TCE conversion is necessary as Philippine fruit arrives in 13 kg cartons.

This Year's Regional Focus – Pukekohe

- One of New Zealand's largest vegetable growing areas is Pukekohe, on Auckland's southern boundary and reaching into the Waikato region. The Pukekohe hub is an area comprising 4,359 ha of some of New Zealand's most fertile and productive soils.
- The area accounts for only 3.8% of New Zealand's total hectares of fruit and vegetable production, but the $327 million revenue generated by the horticulture businesses in Pukekohe in 2017 equated to 26% of New Zealand's total domestic value of vegetable production, and to a lesser extent of fruit.
- The 2018 Deloitte report **"New Zealand's food story: The Pukekohe hub"** valued New Zealand's domestic expenditure on vegetables at $1.3 billion, with exports of fresh vegetables, like onions, and processed vegetables, such as frozen potato fries, contributing $614 million for the year ended June 2017.

- This report is now 5 years old. The data contained within will be out of date, but cannot be easily updated, as it was the result of a specific one-off project with fit-for-purpose methodologies being used to generate the results.
- The strategic relevance of the Pukekohe hub report has, however, not diminished. If anything, as climate change and environmental pressures increase, the report's relevance is likely to intensify.


Deloitte.

New Zealand's food story:
The Pukekohe hub
Prepared for Horticulture New Zealand
August 2018

The report is available at: https://www.hortnz.co.nz/assets/Environment/National-Env-Policy/JR-Reference-Documents-/Deloitte-Pukekohe-Food-Story-Final-Report.pdf

2024 and Beyond

- The Pukekohe hub has something most other regions don't: exceedingly fertile and efficient productive soils, temperate climate, easy and direct access to transport routes, and immediacy to our largest city.
- This means the hub's horticulture production could be a cornerstone in our domestic food security, providing for a hungrier Auckland in the future, and adding significant value to the regional economy – and New Zealand as a whole.
- But only if the current challenges to production, including access to appropriate land, are managed in the most effective and efficient way.

Source: New Zealand Food Story: The Pukekohe Hub. Deloitte 2018.

Endorsed by United Fresh industry analysis.

Industry Plans and Guidelines

https://www.hortnz.co.nz/about-us/aotearoa-horticulture-action-plan/

- In February 2023, Horticulture New Zealand launched the Aotearoa Horticulture Action Plan – Strategy. One of the critical outcome areas is to grow sustainably.
- The scope of the Action Plan is 'food for people' (fresh & processed). It excludes forestry, wine, floriculture, and 'arable for livestock feed' sectors.
- The Plan's target is "increasing grower returns, and achieving $12 billion in annual revenue by 2035".

Source: Aotearoa Horticulture Action Plan - Strategy. Growing Together 2035 (Feb 2023).

- In June 2023, United Fresh released its Sustainable Development Goals (SDGs) Guidelines. These Guidelines provide an industry framework, based on the UN SDGs and the Government's SDGs Indicators Aotearoa NZ model, and will have a significant impact on assisting industry to achieve the Sustainability Outcome Area of the 2035 Action Plan Strategy.

https://unitedfresh.co.nz/technical-advisory-group/united-nations-sustainable-development-goals

Horticulture Training Landscape

Te Pukenga

- Government announced the establishment of one overarching polytechnical institute for New Zealand on 1 April 2020.
- This institute, Te Pukenga, has been given the task of combining the educational activities previously carried out by the various polytechs and technical institutes based around New Zealand, and training activities previously managed by industry training associations (ITO).
- The Te Pukenga website shows a total number of 54 courses related across all horticultural disciplines (excluding wine & grapes); 37 courses with relevance to the fresh produce value chain; and, 17 courses specifically related to fruit & vegetable production, post-harvest and management.
- Horticulture related apprenticeships are also listed on the Te Pukenga website, with 4 apprenticeship categories being offered related directly to fruit & vegetable production and distribution.

Universities

- Horticultural focused degrees at Bachelor, Masters, and Doctoral levels are offered by Massey University and Lincoln University.
- Both universities offer a graduate or post-graduate pathway in horticulture related topics for foreign students arriving in New Zealand, having obtained a recognised degree in their home countries.
- Massey University is no longer offering undergraduate Diplomas in Horticulture.
- The number of horticulture science graduates, from either university, entering the industry each year is very limited, and does not meet the industry's full needs.

Te Wananga

- Of the three registered Māori Wananga providers. Te Whare Wananga o Awanuiarangi, is offering a course on Kai Oranga (learn to grow healthy food).

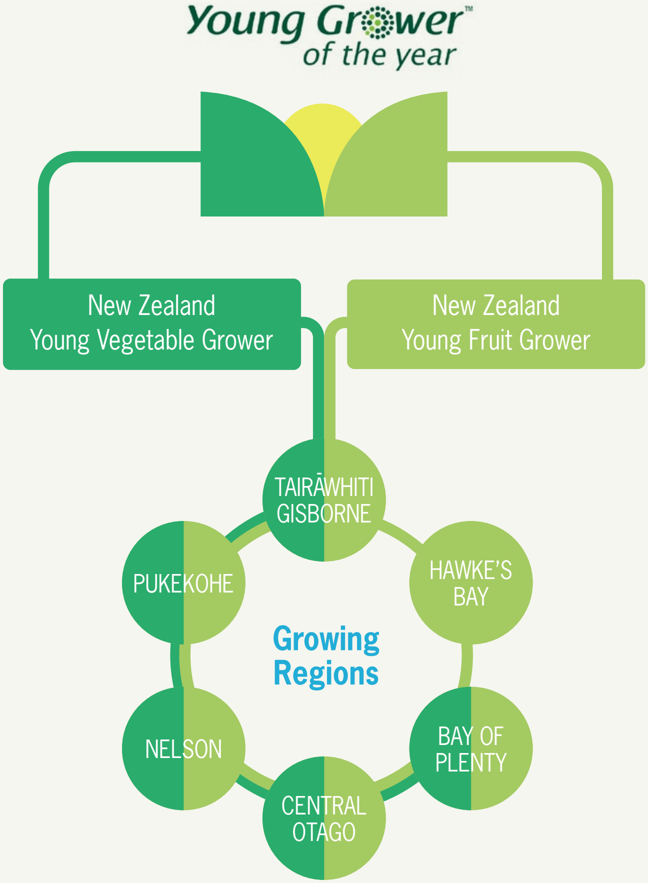
Private Training Providers

- There are at least 7 NZQA registered private training providers offering one or more certificate or diploma courses in horticulture.

Sources: United Fresh industry analysis, August 2023. Te Pukenga website, accessed 10 July 2023.

Young Grower Competition

- The premier annual skills competition for the horticulture industry's future leaders.



For more information visit: https://www.younggrower.co.nz/

Distribution of Fruit by Regional Councils (area planted, ha; 'S' indicates that Statistics NZ have suppressed data)

Regional Council Year ended 30 June 2022	Apples	Kiwifruit	Summerfruit	Avocados	Citrus	Berryfruit	Olives	Other Subtropical	Other fruits	Total fruits
Northland	10	470	13	2,170	279	65	83	93	107	3,290
Auckland	S	730	18+S	600	72	137	145	44	62+S	1,808
Waikato	60	680	30	120	11	399	22	40	41+S	1,403
Bay of Plenty	120	11,290	11+S	2,120	38	76	5	57	59	13,776
Gisborne	620	570	19	70	1,119	12	4	93	94	2,601
Hawke's Bay	5,860	130	467	40	24	115	115	12	16	6,779
Taranaki	0	20	38	10	0+S	7+S	0	5	5	85
Manawatu-Wanganui	S	130	28	10	0+S	27	23	13	13	244
Wellington	90	70	13	0	1	10	169	4	12	369
Tasman-Nelson	2,210	440	43	10	8	224-S	33	8+S	14+S	2,982
Marlborough	20	S	35	0	0	3	16	1+S	440+S	514
West Coast	S	0	6	0	0	3	0	1	1	11
Canterbury	130	70	77	1+S	2	651	71	13	14	1,029
Otago	380	S	1,442	S	1	30	8	S	25+S	1,886
Southland	S	S	1+S	1+S	0	81	0	3+S	3+S	89
Chatham Islands	0	0	0	0	0	0	0	0	0	0
Total 2022	**9,500**	**14,600**	**2,241**	**5,152**	**1,555**	**1,840**	**694**	**375**	**906**	**36,866**
2017	8,615	11,705	2,140	3,979	1,700	2,321	921	899	1,089	33,369
2012	8,845	12,757	2,276	4,149	1,857	2,598	1,657	1,265	369	35,800
% change (2012 to 2022)	7%	14%	-2%	24%	-16%	-29%	-58%	-70%	129%	3%

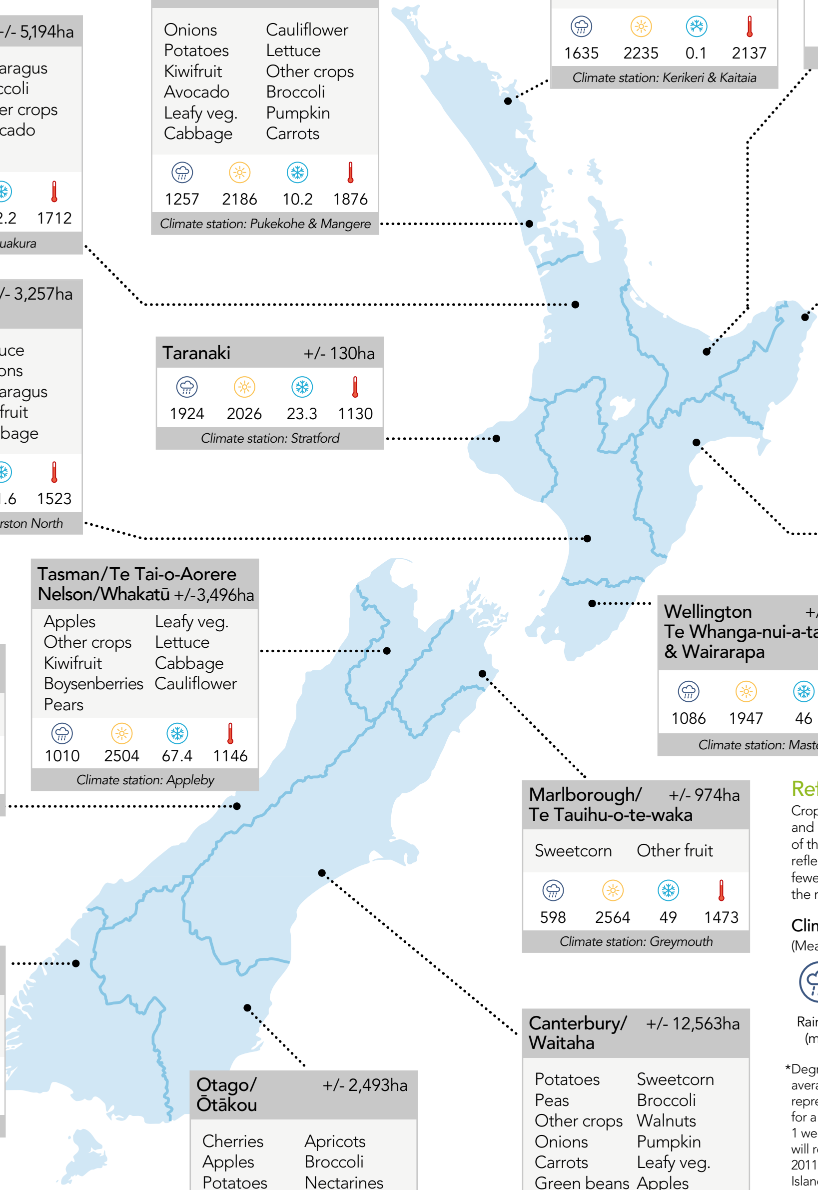
Distribution of Vegetables by Regional Councils (area planted, ha)

Regional Council Year ended 30 June 2022	Asparagus	Broccoli, Cab & Caulis	Carrots	Peas & Beans	Lettuces	Onions	Potatoes	Squash	Sweet corn	Other Veg.	Total Veg.
Northland	0	63	24	6	12	10	50	10	20	1,296	1,491
Auckland	0	773	117	15	276	1,700	1,260	20	20	765	4,946
Waikato	183	229	77	6	41	1,140	1,230	0	20	346	3,272
Bay of Plenty	5	37	S	3	3	S	S	0	20	34+S	102
Gisborne	2	298	S	100+S	180	0	80	1,420	1,010	289	3,279
Hawke's Bay	24	110	41	1,434	1	710	110	3,320	1,170	888	7,808
Taranaki	1	12	S	0	0	S	S	0	10	4	27
Manawatu-Wanganui	135	629	221	288+S	181	150	830	0	60	798	3,004
Wellington	0	42	1	3+S	12	0	10	0	0	29	94
Tasman-Nelson	0	270-S	11	7	111+S	50	10	20	40	240+S	378
Marlborough	0	1	51	30	0	20	10	0	320	2	434
West Coast	0	0	0	0	0	0	0	S	260	0	260
Canterbury	30	461	869	3,792	96	1,060	4,240	10	360	434	11,352
Otago	S	228	S	0	52	S	270	0	0	25+S	575
Southland	0	2	221	2	0	S	170	0	0	3	398
Chatham Islands	0	0	0	0	0	0	0	0	0	0	0
Total 2022	**380**	**3,155**	**1,633**	**5,686**	**965**	**4,840**	**8,270**	**4,800**	**3,310**	**4,854**	**37,420**
2017	744	3,632	1,851	4,705	1,532	6,009	9,450	5,794	3,871	7,613	45,201
2012	820	3,622	2,047	7,858	1,250	5,718	11,578	6,837	4,664	5,313	49,707
% change (2012 to 2022)	-54%	-13%	-20%	-28%	-23%	-15%	-29%	-30%	-29%	-9%	-25%

Distribution of Indoor Crops (m^2; 000s)

Regional Council	Capsicum	Cucumber	Salad greens	Mushrooms	Tomatoes	All Other Veg.
Northland	1	24	14	S	S	30
Auckland	282	99	130	S	186	151
Waikato	50	85	18	3	324	39
Bay of Plenty	49	S	19	0	S	16
Gisborne	S	S	S	0	S	0
Hawke's Bay	0	0	0	0	3	4
Taranaki	8	0	0	0	0	10
Manawatu-Wanganui	S	0	3	0	0	6
Wellington	0	0	2	0	0	9
Tasman-Nelson	27	3	5	0	95	5
Marlborough	S	0	4	0	19	4
West Coast	0	0	2	0	0	0
Canterbury	3	25	20	94	38	2
Otago	0	0	9	0	S	22
Southland	0	S	0	0	1	0
Chatham Islands	0	0	0	0	0	0
Total 2022	**421**	**236**	**225**	**97**	**666**	**299**
2017	609	231	441	84	839	454
2012	572	269	238	152	1,181	359
% change (2012 to 2022)	-26%	-12%	-5%	-36%	-44%	-17%

Horticulture Activity Distribution



Waikato +/- 5,194ha

Potatoes, Onions, Kiwifruit, Blueberries, Leafy veg., Asparagus, Broccoli, Other crops, Avocado

1123	2059	42.2	1712

Climate station: Ruakura

Auckland/ Tāmaki Makaurau +/- 7,602ha

Onions, Potatoes, Kiwifruit, Avocado, Leafy veg., Cabbage, Cauliflower, Lettuce, Other crops, Broccoli, Pumpkin, Carrots

1257	2186	10.2	1876

Climate station: Pukekohe & Mangere

Northland/ Te Tai Tokerau +/- 4,849ha

Avocado, Kūmara, Kiwifruit, Other citrus, Mandarins, Other crops

1635	2235	0.1	2137

Climate station: Kerikeri & Kaitaia

Bay of Plenty/ Te Moana-a-Toi +/- 13,961ha

Kiwifruit, Avocado, Apples, Other crops

1220	2348	10	2091

Climate station: Tauranga

Gisborne/ Te Tai Rāwhiti +/- 5,880ha

Squash, Sweetcorn, Apples, Kiwifruit, Oranges, Mandarins, Lemons, Broccoli, Leafy veg., Lettuce, Peas

929	2435	39.5	1846

Climate station: Gisborne

Manawatu/ Wanganui +/- 3,257ha

Potatoes, Leafy veg., Broccoli, Peas, Carrot, Lettuce, Onions, Asparagus, Kiwifruit, Cabbage

957	1748	51.6	1523

Climate station: Palmerston North

Taranaki +/- 130ha

1924	2026	23.3	1130

Climate station: Stratford

Hawke's Bay/ Te Matau-a-Māui +/- 14,594ha

Apples, Squash, Sweetcorn, Peas, Onions, Pumpkin, Green beans, Tomatoes, Nectarines, Other summerfruit, Kiwifruit, Plums, Potatoes

738	2424	12	1767

Climate station: Napier

Tasman/Te Tai-o-Aorere Nelson/Whakatū +/-3,496ha

Apples, Other crops, Kiwifruit, Boysenberries, Pears, Leafy veg., Lettuce, Cabbage, Cauliflower

1010	2504	67.4	1146

Climate station: Appleby

Westland/ Te Tai Poutini +/- 273ha

Sweetcorn

2356	2018	15	1071

Climate station: Greymouth

Wellington Te Whanga-nui-a-tara & Wairarapa +/- 474ha

1086	1947	46	1303

Climate station: Masterton

Marlborough/ Te Tauihu-o-te-waka +/- 974ha

Sweetcorn, Other fruit

598	2564	49	1473

Climate station: Greymouth

Southland/ Murihiku +/- 488ha

Carrots, Potatoes, Other crops

1051	1820	67.6	668

Climate station: Invercargill Airport

Otago/ Ōtākou +/- 2,493ha

Cherries, Apples, Potatoes, Carrots, Apricots, Broccoli, Nectarines

381	2348	146	1054

Climate station: Clyde & Cromwell

Canterbury/ Waitaha +/- 12,563ha

Potatoes, Peas, Other crops, Onions, Carrots, Green beans, Blackcurrants, Sweetcorn, Broccoli, Walnuts, Pumpkin, Leafy veg., Apples

610	2265	59.9	1144

Climate station: Lincoln & Rangiora

Reference

Crops are named when more than 100ha are grown in a region and listed in descending order of hectares planted. The use of the symbols "+/-" in relation to the Regional Hectare data reflects that the Agricultural Census 2022 data is based on fewer participants completing their Census documents and the reality of fluctuating planting area being the norm.

Climate Summaries

(Mean annual values for 2011-2020)

Rainfall (mm)	Sunshine (hours)	Ground frost (days)	Heat units (degree days)*

*Degree days are a system of measurement to determine average warmth during a time period. Each degree day represents a temperature level of one degree above 10°C, for a period of one day. A measurement of 3 degree days in 1 week means either 1 day at 13°C, or 3 days at 11°C, as these will result in the same average temperature. Weather patterns 2011-2020 compared to 2000-2010: Rain 1% more rain North Island; 2% more in the South Island. Sunshine hours on average uncharged. Ground frost: Frost days 8% less on average South Island (67 vs. 74). North Island 21% less (26 vs. 33) Degree days: Growing days (above 10 degrees x hrs): 4% more in North Island; 7% more in South Island regions.

Fresh Facts' comments: As 2022/23 has shown, heavy rains, flooding, hail, drought, strong winds & frost can all severely affect horticultural production, and the wider produce supply chain.

Source: Statistics New Zealand 2022 Agricultural Production Census. Climate information copyright holder and source: National Institute of Water and Atmospheric Research Ltd (NIWA). Data from multiple climate stations have been used to build near complete data sets for the decade.

For more information visit: https://niwa.co.nz/our-science/climate

Horticultural Export Authority

New Zealand Horticulture Export Authority

www.hea.co.nz

HEA has been a value enabling structure to managing horticultural export risk since 1987.

— The HEA framework is based on 2 key tools:
  > The Export Marketing Strategy (exporting rules) for each product group.
  > Licensing exporters.

— HEA enables value creation via collaboration, co-ordination, and information under enforceable industry programmes.

EXPORT

HEA

Avocados, Blackcurrants, Buttercup Squash, Chestnuts, Kiwifruit to Australia, Persimmons, Summerfruit,Tamarillos, Truffles, Walnuts.

↕

HEA

Goal:	Vision:	Export Marketing Strategy:	Licensing:	Value Enabling:
exports to reach $600 million by 2025	structured approach to exporting; market access	enforceable industry system for exports	80 licenses held by 58 exporters as at 30 September 2022	collaboration, co-ordination, information, enforceable industry programmes

Source: Horticulture Export Authority Annual Report 2022.

— Annual exports of product groups utilising the HEA framework exceed $300 million in each of the 6 years since 2017.

The HEA Trade Barriers Report 2022 is available here: https://hea.co.nz/2012-05-11-03-05-28/exec-summary

5+ A DAY CHARITABLE TRUST

At the 5+ A Day Charitable Trust, we provide Kiwis with fresh inspiration to encourage them to eat five servings of vegetables and two of fruit every day.

We work with a diverse range of people and organisations to get our important messages to consumers. Our education resources provide educators curriculum-linked tools to teach our tamariki about the importance of healthy eating.

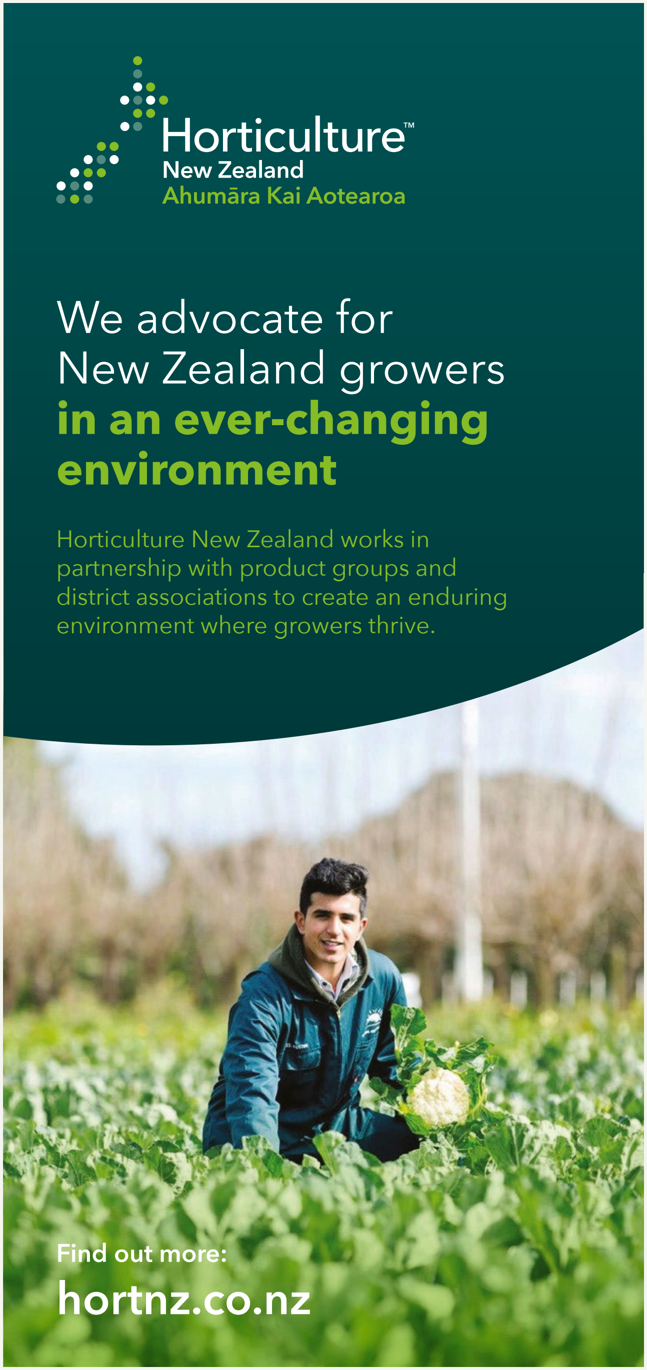
Through our work with the government funded Fruit in Schools initiative, we provide over 27 million servings of fresh fruit and vegetables to more than 120,000 tamariki annually. This is making a positive impact on the health and well-being of our youngest Kiwis.

Working together we can raise the consumption of fresh fruit and vegetables in all New Zealanders for better health outcomes.

Check out our seasonal promotions on our website www.5aday.co.nz and follow us on social media @5adaynz for fresh recipes, nutrition information and great giveaways.

Educators can order our free curriculum linked resources from our education website www.5adayeducation.org.nz

Horticulture NZ



Affiliated Product Groups

https://www.applesandpears.nz/	http://asparagus.org.nz/
https://www.nzavocado.co.nz/	https://www.blackcurrant.co.nz/
https://boysenberry.co.nz/en/home/	http://nzbsc.org.nz/
https://www.citrus.co.nz/	http://www.feijoa.org.nz/wp/
http://www.nzkiwiberry.com/	https://www.nzkgi.org.nz/
https://www.onionsnz.com/	https://www.passionfruit.org.nz/
http://www.nzpersimmons.org.nz/	https://potatoesnz.co.nz/
https://www.processvegetables.co.nz/	https://www.strawbsnz.co.nz/
https://www.summerfruitnz.co.nz/	https://www.tamarillo.com/
https://www.tomatoesnz.co.nz/	https://www.freshvegetables.co.nz/

Source: Horticulture New Zealand Product Groups & District Associations Website, accessed on 15 June 2023.

Glossary

Term	Definition
Collaborative Marketing	When similar organisations come together to create campaigns or products designed to increase brand exposure, awareness, and leads.
Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)	A free trade agreement involving New Zealand and 10 other economies in the Asia Pacific region.
Compliance-Based Intervention Scheme (CBIS)	A risk-based intervention programme for eligible pathways that demonstrate consistent compliance with Australia's biosecurity import requirements.
Cost, Insurance, and Freight (CIF)	The charges paid by a seller to cover the costs, insurance, and freight of a buyer's order, while the cargo is in transit.
Farm Gate Value	The value of the fruit and vegetables sold by the grower.
Free on Board (FOB)	The value of goods at the point of shipping after having been loaded, but before transport begins.
GlobalG.A.P.	An export standard for farm production, with Certification for food safety and traceability; environment (including biodiversity); workers' health, safety and welfare; animal welfare; Integrated Crop Management (ICM), Integrated Pest Control (IPC), Quality Management System (QMS), and Hazard Analysis and Critical Control Points (HACCP).
NZGAP	NZGAP (New Zealand Good Agricultural Practice) certifies the safe and sustainable production of fruit and vegetables in New Zealand. Good Agricultural Practice (GAP) is about the systems and standards inside the farm gate. GAP certification identifies audited growers who can prove compliance to the standards.
Orchard Gate Return (OGR) / Farm Gate Return (FGR)	The farm gate value achieved per ha of production.
Stock Keeping Unit (SKU)	A distinct item in a company's inventory, marked with a unique SKU code used to track the stock levels and movements of the item.
Tray Carton Equivalents (TCEs)	A measure of weight used to establish a common reporting standard for fruit packed and sold in different sizes (and therefore weights) of packaging.
Value for Duty (VFD)	Value of imports before the addition of insurance and freight costs.

Useful Links

Fresh Facts Online:
https://unitedfresh.co.nz/technical-advisory-group/fresh-facts

United Fresh:
https://unitedfresh.co.nz/

Horticulture New Zealand:
https://www.hortnz.co.nz/

Horticulture Export Authority:
https://www.hea.co.nz/

MPI Situation and Outlook:
https://www.mpi.govt.nz/resources-and-forms/economic-intelligence/situation-and-outlook-for-primary-industries/

Plant & Food Research:
https://www.plantandfood.com/en-nz/

Statistics New Zealand database:
https://infoshare.stats.govt.nz/

NZ GAP:
https://www.nzgap.co.nz/

GlobalG.A.P. :
https://globalgapsolutions.org/

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