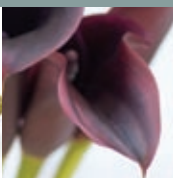
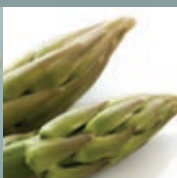




FreshFacts

NEW ZEALAND HORTICULTURE

2006



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New Zealand horticulture – a dynamic industry

New Zealand horticulture continues to grow from strength to strength, adding more products, engaging with new markets and increasing export revenues. With the help of new science, better technology, improved systems and innovative thinking, horticulture is redefining its place in New Zealand industry and society – as well as globally. Therefore, in addition to saluting the scale and value of New Zealand horticulture, FreshFacts 2006 seeks to celebrate the industry's depth.

In this edition readers will find the symbols below – each highlighting a different dimension to New Zealand horticulture and demonstrating how this multi-faceted industry is combining quality products and techniques, business acumen and global relationships to grow a bright and sustainable future.



Paul McGilvary
CEO, HortResearch



Exports

Horticultural exports from New Zealand exceed \$2.3 billion across more than 100 countries.



Fruit produced in third countries

- (a) Fruit from New Zealand cultivars are grown under contract in third countries for sale in New Zealand's global markets.
- (b) Offshore licensees distribute New Zealand horticultural products and processes in many countries as well as innovative fruit cultivars.



Domestic market

New Zealand market consumption of fruit and vegetables is estimated at \$2.5 billion.



International R&D collaborations

Strong linkages with overseas R&D institutes form an important global network for New Zealand based research into new fruits, vegetables and horticultural processes.



Intelligent technologies

- (a) Exports of market leading 'intelligent' sorting and grading technologies and techniques for crop management.
- (b) Technology assistance in horticultural production to several countries including aid programmes.



Tourism

Food and wine tourism is important to New Zealand horticulture and tourism industries – and is reflected in much of New Zealand's tourism and its marketing.

Fresh Facts, formerly called Horticulture Facts and Figures, published annually since 1999 by HortResearch - The Horticulture & Food Research Institute of New Zealand Ltd. Further copies are available from: HortResearch, Marketing & Communications, Private Bag 92 169, Mt Albert, Auckland, Tel: 09-815 4200, www.hortresearch.co.nz

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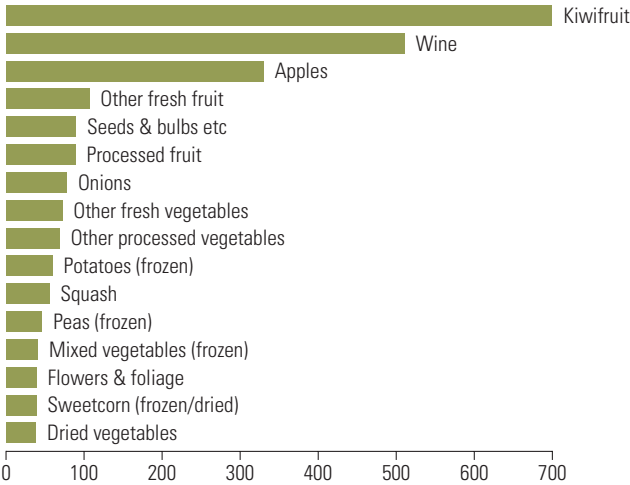
Unless stated otherwise all statistics are for the year ending 30 June 2006 and expressed as \$NZ. Exports are given as free on board (fob) values. Imports are given as cost, insurance, freight included (cif) values. Historical values have not been adjusted for inflation.

Horticultural exports (\$ million, fob)

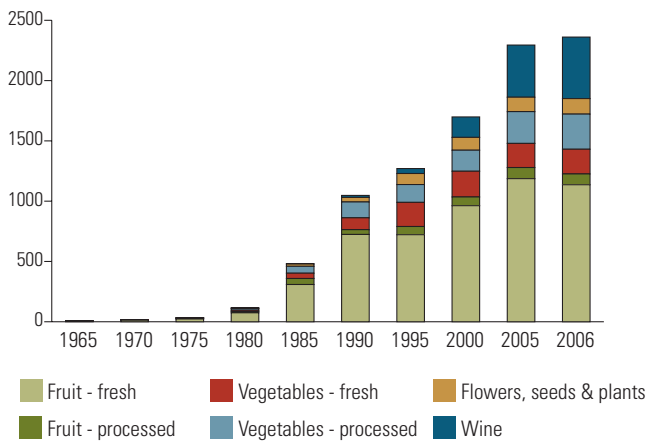
Year ended June	1965 ^a	1975 ^a	1985 ^a	1995 ^a	2005 ^a	2006 ^b
Fresh fruit						
- Apples	5.0	19.3	108.2	343.6	387.0	330.2
- Kiwifruit		2.9	171.9	320.8	720.2	699.4
- Other fresh fruit	0.6	0.8	28.4	57.6	79.6	106.7
Total fresh fruit	5.6	23.0	308.5	722.0	1186.8	1136.3
Processed fruit						
- Juices - fruit		0.1	9.6	30.5	34.1	31.6
- Other processed fruit	0.1	1.7	40.3	44.3	65.7	57.9
Total processed fruit	0.1	1.8	49.9	74.8	99.8	91.5
Fresh vegetables						
- Onions	0.2	1.2	17.7	92.6	61.6	77.7
- Squash			14.6	57.7	72.1	55.2
- Other fresh vegetables	0.7	1.9	11.6	49.8	66.3	72.0
Total fresh vegetables	0.9	3.1	43.9	200.1	200.0	204.9
Processed vegetables						
- Peas (frozen)	0.5	1.5	22.0	34.3	36.6	45.9
- Potatoes (frozen)				14.1	54.3	59.5
- Sweetcorn (frozen/dried)	0.2	0.8	9.5	30.6	42.7	38.9
- Mixed vegetables (frozen)			4.6	23.9	36.0	40.7
- Dried vegetables					25.5	38.2
- Vegetable preparations					40.2	40.8
- Other processed vegetables	0.8	2.4	20.9	75.6	28.4	27.4
Total processed vegetables	1.5	4.7	57.0	178.5	263.7	291.4
Wine		0.1	3.0	42.0	432.7	510.2
Flowers & foliage		0.2	10.5	49.9	38.5	39.2
Seeds, plants & bulbs etc	0.1	0.6	2.1	17.4	72.8	80.5
Sphagnum moss			6.3	17.3	8.8	9.0
Total exports in current \$	8.2	33.5	481.2	1,302.0	2,303.1	2,363.0
Horticultural exports as % of NZ merchandise exports.		2.0	4.4	7.0	7.4	7.3

Source: ^aBollard (1996) ^bStatistics NZ

Horticultural exports 2006 (\$ million, fob)



Horticultural exports (\$ million, fob)



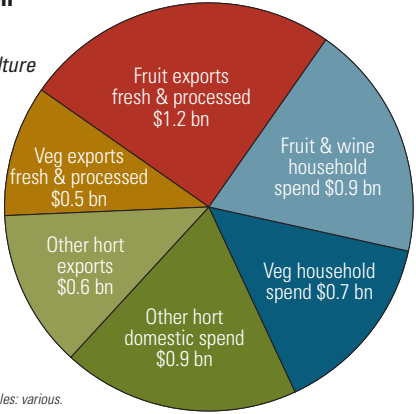
Source: Statistics NZ.

- Horticultural exports have grown from \$115 million in 1980 to \$2.4 billion in 2006.
- Horticultural exports were 7% of all New Zealand merchandise exports in 2006.
- Horticultural exports have grown steadily from 1970 (2% of agricultural exports) through to 2006 (11% of all NZ food and fibre exports).
- Kiwifruit represented 30% of our horticultural exports, followed by wine (22%), apples (14%), processed/frozen vegetables (12%) and fresh vegetables (9%).
- Domestic sales of horticultural products were estimated at \$2.5 billion. The total revenue of the horticultural industry exceeds \$4.8 billion.

For more information visit www.stats.govt.nz

Produce from New Zealand's horticultural industries exceeds \$4.8 billion

New Zealand horticulture is driven by exports, not domestic sales.

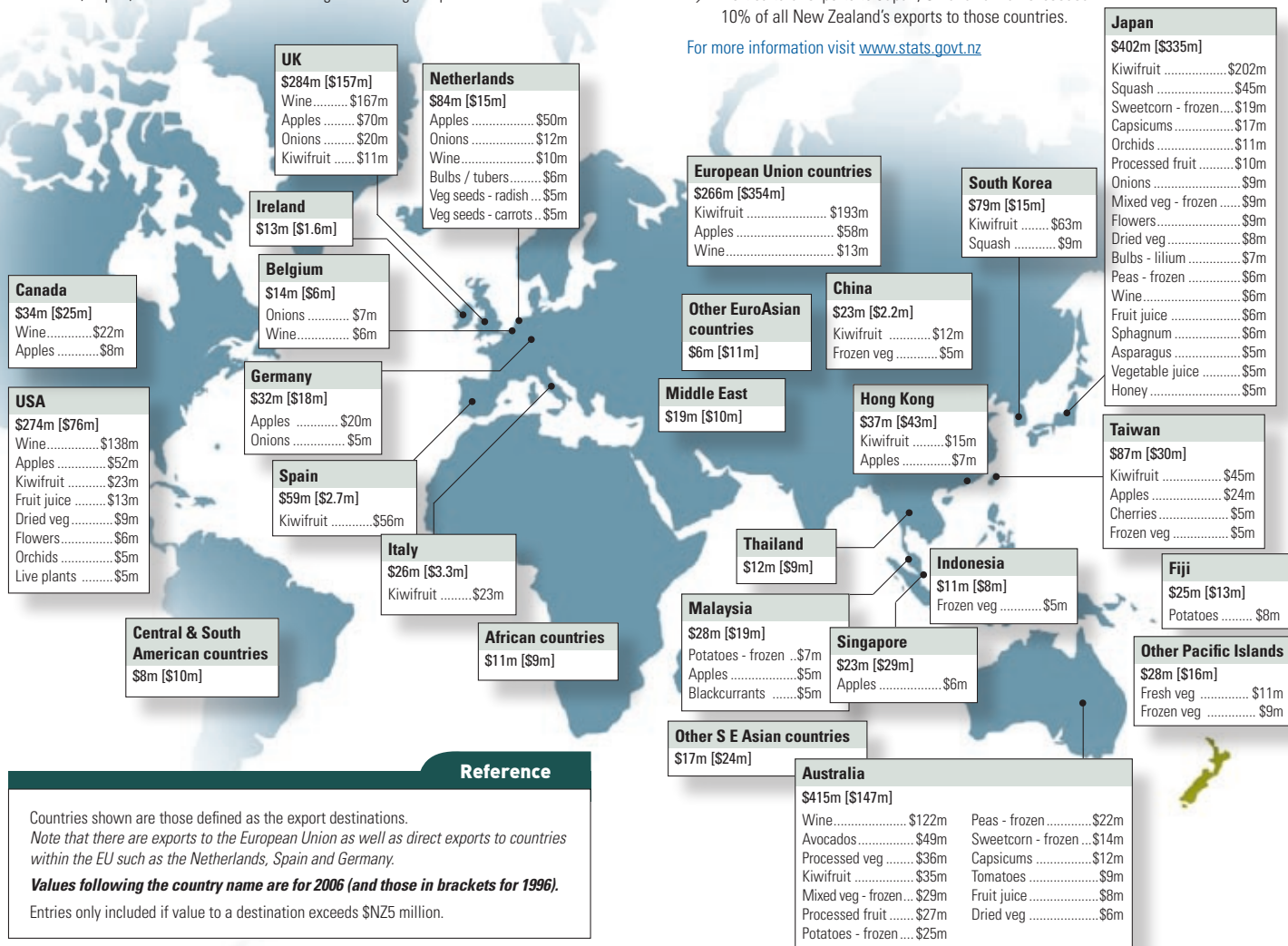


Source: Statistics NZ; domestic sales: various.

Horticulture helps to build New Zealand's profile in many overseas markets.

Export destinations for New Zealand horticultural products - trends since 1996 (\$ million, fob)

- Fruit, vegetables & flowers were exported to 114 countries around the globe in 2006. This is an increase from 80 countries in 1996.
- Exports to 43 countries exceeded \$1 million in 2006, up from 39 in 1996. Of these 43 countries, exports to 21 exceeded \$10 million, up from 14 in 1996.
- The key export markets for New Zealand fruit and vegetables are the European Union, Japan, USA and Australia. All have grown during the past decade.



Reference

Countries shown are those defined as the export destinations.
Note that there are exports to the European Union as well as direct exports to countries within the EU such as the Netherlands, Spain and Germany.

Values following the country name are for 2006 (and those in brackets for 1996).

Entries only included if value to a destination exceeds \$NZ5 million.

Source: Statistics NZ

Short term trends

- For markets over \$250 million, exports increased 20% to Australia and USA/Canada compared with 2005 whereas the European/UK market was comparatively stable. The Japanese market decreased by 16%, but the smaller (< \$100m) Asian markets of Taiwan, South Korea, Singapore, Hong Kong, Thailand and Indonesia recorded an overall increase of 16% compared with 2005.
- New Zealand exports to many diverse markets, often also providing a wide range of products. For example Japan and Australia each receive over 45 products of greater than \$100,000 value. Many Pacific Islands import a similar wide range of horticultural products.
- Japan is the dominant market for flowers (51%) and UK for wines (33%).
- Horticultural exports to Japan, UK and Taiwan exceeded 10% of all New Zealand's exports to those countries.

For more information visit www.stats.govt.nz

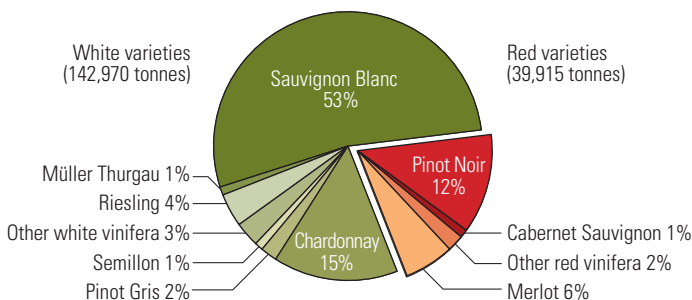
Grape and wine production

Variety	Production area (ha)		Production (tonnes)	
	1996	2006	1996	2006
Sauvignon Blanc	1,140	8,860	12,354	96,686
Chardonnay	1,466	3,779	13,870	26,944
Riesling	276	853	2,877	6,745
Müller Thurgau	712	116	13,838	1,573
Semillon	186	229	2,342	2,664
Pinot Gris	21	762	na	3,675
Other white vinifera	507	544	14,025	4,683
Cabernet Sauvignon	499	531	4,169	2,659
Pinot Noir	431	4,063	4,617	22,062
Merlot	302	1,420	2,857	11,206
Other red vinifera	185	623	2,159	3,948
Undefined	885	836	232	40
Total	6,610	22,616	73,340	182,885^a
Region				
Auckland/Northland	193	504	1,610	1,553
Waikato/Bay of Plenty	117	150	761	261
Gisborne	1,165	1,913	22,330	18,049
Hawke's Bay	1,794	4,346	21,172	33,287
Wairarapa/Wellington	174	777	1,072	3,008
Tasman/Nelson	97	695	761	5,623
Marlborough	2,155	11,488	24,192	113,436
Canterbury/Waipara	213	925	1,059	3,051
Otago	92	1,253	376	4,612
Not assigned to region	610	565	7	5
Total	6,610	22,616	73,340	182,885^a

^aTotal wine industry crushed 185,000 tonnes of grapes in 2006 up from 75,300 tonnes in 1996.

Source: New Zealand Winegrowers Annual Report & Vineyard Surveys 2002 & 2006.

Grape production by variety (2006 vintage)



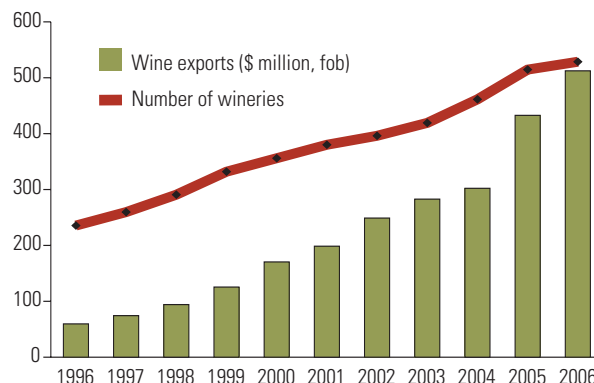
Source: New Zealand Winegrowers Annual Report 2006.

- Exports have increased to \$510m in 2006 up from \$60m in 1996, and up 18% on 2005. Exports to 19 countries exceed \$1m.
- UK (\$167m - up 3% on 2005), USA (\$138m - up 22% on 2005) and Australia (\$122m up 40% on 2005) are the major markets taking 83% of exports.
- The 2006 grape harvest was 185,000 tonnes, up 30% on the reduced 2005 vintage, and 12% on the previous record vintage in 2004.

- Total wine sales reached 108 million litres, over 100 million litres for the first time; and exports (54%) exceeded local sales.
- Sauvignon Blanc (72%), followed by Chardonnay (7%) and Pinot Noir (7%), are the dominant export wines.
- Sauvignon Blanc (36%), Chardonnay (17%), Pinot Noir (18%) and Merlot (7%) are the dominant varieties planted.
- Marlborough produced 62% of grapes crushed in 2006, with 18% from Hawke's Bay, 10% from Gisborne, and 10% from other regions.
- Number of wineries increased to 530, up 14 on 2005.

For more information visit www.nzwine.com

Growth in wine exports and wineries between 1996 and 2006



Source: NZ Winegrowers Annual Report 2006.

NZ wines achieve premium performance



With unfulfilled market demand in key markets and growing markets in Japan, Holland, Denmark and Ireland, New Zealand's wine industry export earnings are projected to increase significantly in coming years. By working together and producing premium quality wine with innovative technology and marketing, the industry believes it has a sustainable future. Market commentators seem to agree:

On diversity: "Now happy with their ability to produce great Sauvignon Blanc and Pinot Noir, many New Zealand producers are discovering the country's enormous potential for aromatic varieties such as Riesling, Gewurztraminer and Pinot Gris."

Stephen Spurrier, *Decanter*, UK, August 2006.

On market positioning: "New Zealand has positioned itself quite uniquely on the UK shelves, keeping volumes low, but prices high, with a reputation for producing classy wines for the discerning drinker that is the envy of most other nations."

Tom Cannavan, *Fine Expressions*, March 2006.

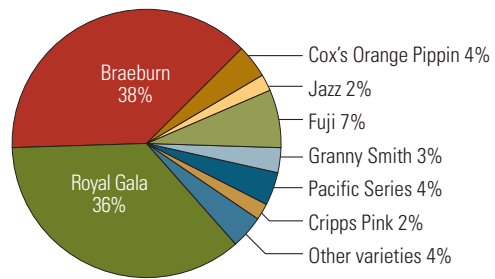
Editor's note: New Zealand wines star in the 'Premium' and 'Super Premium' category of table wines where they enjoy a market share approaching 10%. New Zealand wine has an average price of NZ\$18 per bottle compared with the sector average of approximately NZ\$12.

Industry statistics

Season	1996	2001	2002	2003	2004	2005	2006
Crop volumes ('000 tonnes)							
Apples produced	599	486	502*	508	501	474	354
Fresh apples exported	295	282	315	322	367	322	268
General statistics							
Yield (tonnes/ha)	39.9	34.2	42.9	41.8	41.2	40.5	39.3
Area planted (ha)	15,000	14,200*	11,715	12,150	12,150*	10,980	9,000
Growers (No.)	1,700	1,200*	1,000*	918	917	920	680
Packhouses (No.)	na	125	125	125	102	85	74

** Estimate only.
Source: Statistics New Zealand; Pipfruit New Zealand Inc.; Fruit Research Council of NZ.*

Apple exports by variety - 2006 (Weight basis)



Source: Pipfruit New Zealand Inc. 2006.

- World production of apples increased by almost 4% per annum during the 1990's but has now slowed. Production has been relatively stable at 38 million tonnes in all countries excluding China during the past 6 years. China produces about 25 million tonnes each year, which is 39% of world production.
- New Zealanders ate 14.4 kg of apples per person during 2003-05, which is below the average EU consumption of 17.6 kg per person, but well above Australia and Japan at 6.0 and 5.5 kg per person, respectively.
- New Zealand was ranked second behind Chile among 28 apple producing countries in 2005, judged on 22 criteria including production efficiency, industry infrastructure and inputs, financial and market factors. France, Italy, Netherlands, USA, and Japan were next in line (World Apple Review 2006).

For more information visit www.pipfruitnz.co.nz

Prevar – an international joint venture for pipfruit innovation



Taking its name from the 'premium varieties' it offers, PREVAR™ is an international joint venture that brings together pipfruit growers from New Zealand (Pipfruit New Zealand Inc.) and Australia (Apple & Pear Australia Ltd.), fruit science company HortResearch and the Associated International Group of Nurseries. It demonstrates a fresh approach to the development and marketing of new fruit cultivars.

In 2005 PREVAR™ launched its first new apple, a Royal Gala alternative called Sweetie™ and two new pears, Crispie™ and Maxie™. PREVAR™ has commercial arrangements with partner companies in Australia, France, Belgium, South Africa, Argentina, Chile and the United States.

www.prevar.co.nz



From left: Maxie™, Sweetie™, Crispie™.

- Fresh apples valued at \$330m were exported to 61 countries. Exports were 15% down on 2005. Exports of apple preparations and juice were \$32m.
- 62% of exported apples by value were to EU countries (including UK), 18% to North America and 16% to Asia.
- There were 98 exporters in 2006, with 34 exporting more than 1,000 tonnes.
- Grower numbers have declined since 1996. This reflects growers exiting the industry as well as better industry estimates of grower numbers. Packhouse numbers have steadily declined since 2001.
- Some 90% of NZ apple and pear exports are covered by the industry's 'TrustMark' label that assures customers that the fruit has been grown using New Zealand's Integrated Fruit or Organic Production programmes which meet 'Good Agricultural Practice' standards and comply with EurepGAP or equivalent programmes.

JAZZ™ apple – offshore production



JAZZ™ is the brand name for a new apple variety ('Scifresh') developed in New Zealand by HortResearch and marketed world-wide by ENZA International. 2006 exports from New Zealand were over 240,000 cartons (4,300 tonnes) and achieved a price premium of approx. 65% above the average for other NZ produced export apple varieties. This was primarily due to the apple's 'sensational' flavour and exceptional ability to maintain its quality in storage.

Similar volumes of JAZZ™ apples were also grown under contract in France and Washington State (USA) enabling the development of year-round markets. PVR protected (plant variety rights) trials are proceeding or orchard production has commenced in Australia, South Africa, Chile, UK, Italy and Switzerland. Projections are that by 2010, approximately 54,000 tonnes of the very successful JAZZ™ apple will be exported from New Zealand and a similar volume sourced from crops grown in overseas markets.



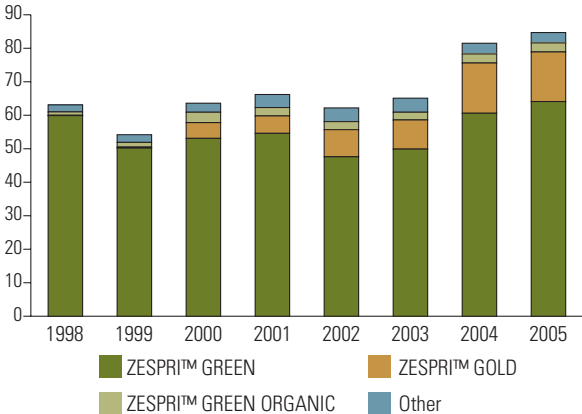
Industry statistics

Season (ends 31 March)	1996	2001	2002	2003	2004	2005	2006
Crop volumes (million)							
Trays submitted	58.7	65.5	70.0	64.1	66.1	85.8	87.8
Trays sold	48.7	61.5	64.7	61.3	65.1	79.7	82.3
General Statistics							
Yield (trays/ha)	5,756	6,445	6,933	6,175	6,247	7,847	7,655
Production area (ha)	10,210	10,159	10,100	10,376	10,580	10,934	11,464
Growers/suppliers (no)	2,205	2,506	2,504	2,719	2,703	2,760	2,748
Packhouses (no)	148	102	106	101	98	88	83
Coolstores (no)	119	98	101	99	86	89	85

A tray weighs 3.6kg.
Source: ZESPRI Group Ltd Annual Reports 2003-04 & 2005-06; Kiwifruit New Zealand Annual Report 1999.

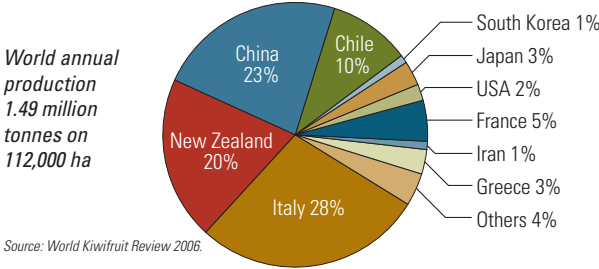
- Exports were valued at \$699 million (fob) in 2006, up from \$263 million (fob) in 1996, and down 3% on 2005. Exports to over 18 countries exceeded \$1 million. Export earnings are estimated to be spread over the crop as follows: ZESPRI™ Green (71%), ZESPRI™ Gold (24%), ZESPRI™ Green Organic (4%) and other kiwifruit (1%).
- Yields of the 2005 crop (under table column 2006) were down 2% over the previous year.
- The export crop comprised 82 million trays: 63 million trays of ZESPRI™ Green (76%), 14 million trays ZESPRI™ Gold (17%), 3 million trays ZESPRI™ Green Organic (4%), and 3 million trays of other kiwifruit.
- The average orchard gate return was \$28,700 per production hectare; comprising \$25,600 for ZESPRI™ Green, \$30,000 for ZESPRI™ Green Organic, and \$42,500 for ZESPRI™ Gold.
- Kiwifruit producing area in 2005/06 increased to 8,988 ha for ZESPRI™ Green (up 4%), to 1,982 ha for ZESPRI™ Gold (up 14%) and decreased to 494 ha for ZESPRI™ Green Organic (down 3%).
- Approx 0.86 million tonnes of kiwifruit entered world trade in 2004, which was dominated by New Zealand (35%), Italy (30%) and Chile (12%). China has an estimated 52,300 ha kiwifruit planted.

Kiwifruit production profile (tray equivalents, millions)



Sources: ZESPRI Group Ltd Annual Reports 2003-04 & 2005-06; Kiwifruit New Zealand Annual Report 1999.

Top ten kiwifruit producing countries 2003-05



- New Zealand kiwifruit yields averaged 23 tonnes/ha in 2002-04, much greater than Italy (81% NZ yields), France (76%) and Chile (71%).
- ZESPRI invested \$6.4 million in research, up 2.5% on 2005.
- In 2004 the kiwifruit industry celebrated the first Century since the introduction of kiwifruit seeds to New Zealand from China by Isobel Fraser in 1904.

For more information visit www.zespri.com

Offshore production to meet year round supply objective for kiwifruit



ZESPRI™ GOLD – The success of ZESPRI™ GOLD kiwifruit is now recognised in major markets and 2,100 ha is planted in New Zealand. However a further 1,150 ha of ZESPRI™ GOLD is grown under contract across six countries: Chile, France, Italy, Japan, Korea and USA (California). Production trials are also in progress in Australia and China.

ZESPRI™ GREEN – New Zealand's largest volume kiwifruit variety ZESPRI™ GREEN, (the 'Hayward' variety developed in NZ but grown globally) dominates NZ kiwifruit exports of \$700m fob – close to 300,000 tonnes. A further phase for marketing of this fruit now means over 7,000 tonnes of the Hayward variety is grown in offshore markets to ZESPRI standards with the objective of having ZESPRI branded kiwifruit varieties available to international markets year round.



Other fresh and processed fruit

Sales value (\$m)

Crop areas as at 30 June 2005	Growers ^{a,b} (no.)	Planted area ^{a,b} (ha)	Crop volume ^b (tonnes)	Domestic ^b 2004	Export ^c (fob) 2006
Avocados	1,350	3,400	22,970	15.1	54.0
Berryfruit		2,541	22,950	29.9	16.6
- Blackberries		58		2.0	
- Blackcurrants	52	1,311	10,440	1.7	
- Boysenberries	55	196	3,550	1.5	
- Raspberries	60	190	1,260	0.2	
- Blueberries	95	567	2,940	0.5	12.5
- Strawberries	100	219	4,760	24.0	3.9
- Mixed					0.2
Citrus	400	1,702	43,540	16.4	4.4
- Grapefruit		48			
- Lemons		334	5,000		2.5
- Mandarins	334	676	16,900		1.6
- Oranges	220	541	21,640		0.3
- Tangelos		103			
Feijoa	200	181	500	1.7	0.1
Grapes - table		112			0.2
Hops	18	370	730		
Nashi	90	119	1,400	1.2	0.3
Nuts		1,841			0.1
- Chestnuts	100	615	200		
- Macadamias		322			
- Walnuts		518			
- Other nuts		389			
Olives	400	2,485	1,600		
Passionfruit		66	240		0.7
Pears		720			7.1
Persimmons	88	195	3,000	0.6	7.5
Summerfruit	450	2,325	13,455	57.0	14.1
- Apricots		487	3,195		4.6
- Cherries		524	1,622		9.0
- Nectarines		433	3,756		0.3
- Peaches		548	3,074		
- Plums		333	1,808		0.2
Tamarillos	175	206	740	1.4	1.1
Other fruit		174			0.5
Total fresh fruit				123.3	106.7
Processed fruit <i>Fruit used for processing is produced on the orchard areas described above</i>					
Apple juice				45.9	23.7
Avocado oil					2.1
Other fruit juices				92.1	7.9
Other fermented beverages					0.4
Dried fruit & nuts					1.6
Frozen fruit			[boysenberries \$4.8m, kiwifruit \$2.1m, blueberries \$1.4m]		9.8
Fruit preparations			[apples \$8.0m, blackcurrants \$9.8m, kiwifruit \$2.2m]		18.3
Hops				0.7	7.2*
Jams, jellies and purees					19.9
Olive oil				2.3 ^b	0.6
Total processed fruit				140.8	89.5

Sources: ^aStatistics NZ - Agricultural Production Survey 2006; ^bSector estimates - Horticultural Monitoring Report 2006; ^cStatistics NZ. * Estimate only.
Blank entries indicate that either the information is not available or items are valued at less than \$100,000.

Avocados

- NZ's third largest fresh fruit industry



A fourfold increase in crop area to about 4,400 ha in a decade - with only 66% of the area at full production - illustrates the growth of the Avocado industry. Output volume increased from 9,454 tonnes in 1996/97 to 22,970 tonnes in 2005/06.

For over a decade the quantity of avocado fruit exported has always exceeded domestic consumption. In 2000 the USA and Australia received similar quantities of fruit while less than 3% went to other markets. Today 90% of fruit is exported to Australia and 8% to a growing Japanese market. Avocado exports reached \$54 million in 2006, up from \$10 million in 1996.

Lower grade avocado fruit are used for oil production with New Zealand's unique cold-press technology giving excellent results. Avocado oil exports of \$2.1 million go to over 20 countries with 75% to Australia, UK, USA and Netherlands.

- Fresh berryfruit exports were similar to 2004/05 values, with blueberries and strawberries being the dominant exports.
- Avocado exports increased 86% on 2004/05 values.
- The olive industry produced over 190,000 litres of virgin oil in 2006.
- Exports were down 14% on 2004/05 values for cherries (\$9m) and unchanged for pears (\$7m). Exports of persimmons (\$8m) were up 29% on 2004/05 values.
- Domestic markets are significant for citrus (\$16m), berryfruit (\$30m) and summerfruit (\$57m).

For more information visit www.hortnz.co.nz, www.summerfruitnz.co.nz, www.citrus.co.nz, www.olivesnz.org.nz and www.nzhops.co.nz

Sorting and filling machines for berry crops



Waikato-based BBC Technologies sell machines in 10 countries including Holland, Germany, Argentina & Chile. Best known in blueberries, BBC machines also handle other small crops including olives, peanuts, and grape tomatoes (about half of the USA crop is packed on BBC machines). About 80% of new berryfruit graders sold in the USA are BBC machines.

Grading of soft berry fruit is especially difficult as any contact with the soft cells of the berry can damage the fruit. BBC's unique machines can sort on the basis of softness and/or colour. In 2005 their Soft Sorta was named one of the 'Top Ten New Product Winners' at the World Ag Show in California. Early development was assisted by R&D funding from Technology NZ. 95% of BBC production is exported.

For more information visit:
www.bbctechnologies.co.nz



BBC ColorSorta installed at Gresham, Oregon, USA.

Exports of flowers, plants, seeds and other products (\$ million, fob)

	1985	1990	1995	2000	2005	2006
Cut flowers & foliage						
- Hydrangeas					2.8	2.4
- Lilium			1.5	1.9	0.4	0.4
- Nerines				0.6	0.6	0.6
- Orchids	2.8	8.2	14.6	22.4	18.4	20.2
- Paeonies				0.5	1.2	1.2
- Pittosporum					0.4	0.5
- Proteaceae	0.3	0.5	1.5	1.4	1.1	1.2
- Sandersonias		0.2	5.6	3.1	0.8	0.6
- Zantedeschias		1.9	6.6	7.7	5.5	6.0
- Other foliage	2.9	0.7	0.2	0.6	0.3	0.5
- Other flowers	4.6	7.8	19.9	8.5	7.0	5.6
Plants						
- Live plants	6.3	2.5	3.5	5.6	15.7	12.7
Seeds						
- Flower seeds	0.5	<0.1	0.3	2.1	0.3	0.2
- Fruit seeds					0.4	1.6
- Cabbage seeds					3.2	7.0
- Carrot seeds					6.8	6.1
- Radish seeds					11.7	14.8
- Other veg seeds	1.2	2.1	7.3	15.9	8.5	10.7
- Tree seeds				1.6	0.6	1.4
Bulbs, tubers, corms						
- Lilium					9.4	13.5
- Sandersonias					2.2	1.4
- Tulips					6.4	6.6
- Zantedeschias				1.5	5.4	3.7
- Others	0.2	2.0	6.3	10.1	1.8	0.8
Sphagnum moss		11.0	17.3	15.3	8.8	9.0*
Total	18.8	36.9	84.6	98.8	119.7	128.7

The term "bulbs" is used to include bulbs, corms, tubers, tuberous roots, crowns & rhizomes. * Estimate only.

Source: Statistics NZ.

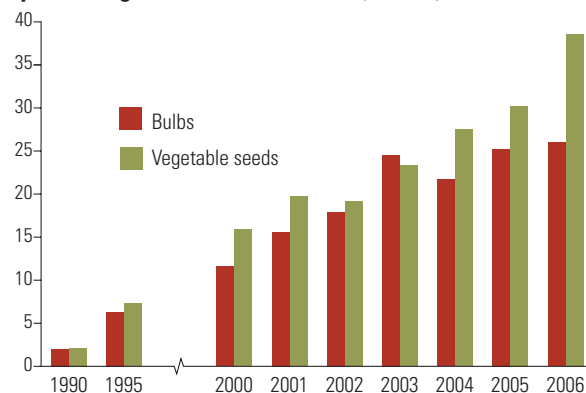
- Exports of seeds and bulbs have increased from \$14 million in 1995 to \$68 million in 2006.
- Exports of cut flowers and foliage have decreased from \$50 million in 1995 to \$39 million in 2006.
- Flower exports of Zantedeschia (Calla lilies) were 5.1 million stems and Cymbidium orchids 3.8 million stems. Exports of sandersonia, hydrangeas, proteaceae and nerines each exceeded 1 million stems.
- Over 90% flowers are handled by 12 exporters.
- There are significant exports of orchids (\$11m), zantedeschia flowers and tubers (\$4m), and lilium bulbs (\$7m) to Japan.
- There are over 1200 flower growers. Approximately 400 are full-time producers.
- The domestic market for cut flowers is estimated to be \$60 million.

For more information visit www.nzflowers.com

Bulbs for Northern Hemisphere markets

Bulb production in New Zealand has increased nearly four-fold, from \$7 million in 1996 to \$26 million in 2006 as several large Dutch companies seek to supply their customers year-round. New Zealand-produced bulbs are exported to over 40 countries with the dominant importers being Japan (34%), Netherlands (22%), and USA (17%). These exports are used to fill the market gap in Northern Hemisphere production for early and late season supply. New Zealand's main bulb exports are lilies, tulips and callas. Paeony, sandersonia, gladioli, iris and freesia bulbs are also exported.

Tulip varieties are imported from the Netherlands and grown in Southland, and the production of lily bulbs is based in Canterbury. In Calla bulb production New Zealand has developed competitive advantage through access to new varieties produced by local breeding programmes.

**Exports of vegetable seeds and bulbs (\$ million, fob)**

Source: Statistics NZ.

**Vegetable seeds
- kiwi advantage secures growth**

Vegetable seed exports have increased four-fold in a decade from \$10 million in 1996 to \$39 million in 2006. New Zealand offers several comparative advantages to Northern Hemisphere seed companies for the multiplication of vegetable seed during their off-season. This growth in seed production is backed up by effective crop pollination, high quality production and harvesting systems. New Zealand also offers an opportunity for international seed companies to spread their production risks.

New Zealand exports seeds to over 40 countries, but the dominant importers are the Netherlands (42%), South East Asian countries (36%), France & Italy (5%) and Australia (5%). Although radish, carrot and cabbage are the dominant seeds grown for these markets, there are also several other crops such as onions, tomatoes, and silverbeet with significant production.

Fresh and processed vegetables

Sales value (\$ million, fob)

Crops as at 30 June 2006	Growers ^c (no.)	Planted area (ha)	Crop volume ^c (tonnes)	Domestic ^c 2006	Exports 2006 Fresh Processed ^d
Asparagus	131	810	2,920	6.5	5.2 1.6
Beans	216	746	20,000	12.8	5.3
Brassicas	260	3,504	82,000	80.3	1.0
- Broccoli	80	1,717	18,000		
- Cabbage	80	808	40,000		
- Cauliflower	100	979	24,000		
Capsicums	134	55	11,500	29.3	28.9
Carrots	99	1,450	65,000	41.3	6.8 0.5
Cucurbits	236	283	1,770	41.3	0.1
Garlic	28	268	1,427	6.5	0.8
Kumara	99	1,462	17,500	33.8	
Lettuce	315	1,207		39.1	1.2
Melons		387			1.5
Mushrooms	10	42	8,500	41.1	1.4
Onions	135	4,855	210,000	25.0	77.7
Peas	603	8,747	63,000	45.0	45.9
Potatoes	278	11,717	501,000	303.0	11.3 59.5
Pumpkin	133	1,093	31,000		
Silverbeet/Spinach	122	396	4,000	13.4	
Squash	187	6,325	123,000	9.8	55.2
Sweetcorn	326	7,115	96,500	28.0	0.4 38.9
Tomatoes - greenhouse	275	120	42,000	97.5	11.1
Tomatoes - outdoor	77	625	50,000	5.0	3.6
Mixed vegetables	Made from combinations				40.7
Dried vegetables	of the above crops				38.2
Vegetable preparations					40.8
Vegetable juices					7.1
Other Vegetables ^a		1,641			2.3 9.3
Total	2,815^d	56,352		858.7	204.9 291.4

^aIncludes taro, celery, parsnips, spring onions, Asian vegetables (excl. Chinese cabbage), yams, witloof, leeks, vegetable shoots, shallots, swedes and some others. ^bProcessing includes freezing, canning, juicing, and artificial drying.

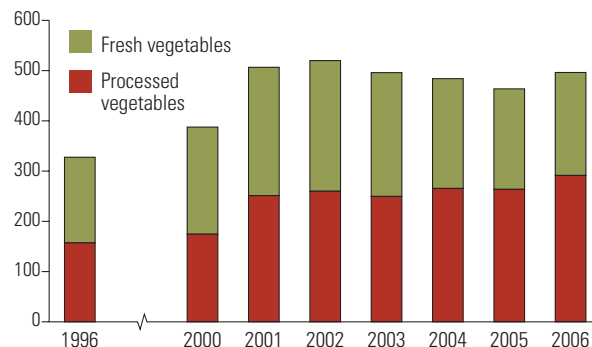
^cSector estimates. Blank entries indicate that the information is not available. ^dMany growers produce multiple crops.

Sources: Statistics NZ - incl. Agriculture Census 2002 & Agriculture Production Survey 2005; Horticulture NZ 2006; Horticulture Monitoring Report 2006.

More than 50 different types of vegetables are grown in New Zealand for consuming fresh or for processing. In recent years there has been an increase in the range and volume of New Zealand grown Asian vegetable varieties for local consumption.

- Vegetable exports comprising fresh vegetables (\$205m) and processed vegetables (\$291m) went to 76 countries.
- Onions (38%) and squash (27%) dominate fresh vegetable exports. Capsicum exports (\$29m) have increased in recent years.
- Japan (39%) is the major market for fresh vegetables, while Australia (48%) is the main market for processed vegetables.
- Potatoes, sweet corn, mixed vegetables, peas, and beans are the major processed and frozen vegetables exported.
- The fresh vegetable sector has about 1450 growers who produce over 50 crops with a farm gate value of \$372m.

Vegetable exports increased between 1996 and 2006 (\$ million, fob)



Source: Statistics NZ.

- There are about 750 vegetable process growers and 110 potato process growers in New Zealand. The farm gate value of the process industry exceeds \$100m.
- Across all sectors the vegetable growers in New Zealand farm over 50,000 ha and employ 25,000 people.
- Many growers produce multiple crops each year, and crop types can vary from year to year. For several crops the barrier to entry is low.
- Data for domestic sales are incomplete but consumption at the retail level is estimated to exceed \$1 billion.

For more information visit www.hortnz.co.nz

NZ potatoes for the Pacific Rim countries

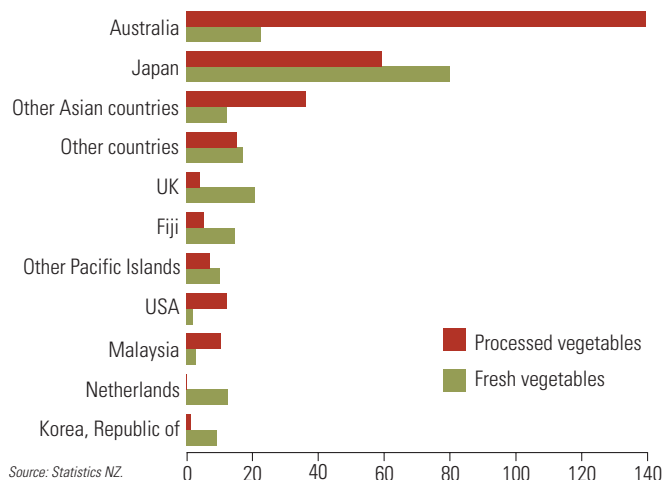


New Zealand produces an estimated 500,000 tonnes of potatoes each year. Almost 60% of the crop is processed into French fries with most production consumed domestically - but a significant 20% is exported. Frozen French fries are exported to Australia (42%) and SE Asian countries (44%) with the balance to Pacific Islands.

Potato export values have grown from \$50 million (fob) in 1996 to \$70 million in 2006, with processed potatoes now over 80% of exports. Some 70% of fresh potatoes are exported to Fiji with the balance to other Pacific Rim countries.

The industry continues to work to open new export markets. DNA-based diagnostics can now be used to meet market access requirements and protocols are being developed for potato cyst nematode. A Potato Export Certification Scheme provides phytosanitary endorsement for freedom from this nematode which is a major concern for many importing countries. In 2005 access for NZ potato exports was gained to the Taiwanese market.



Destinations of vegetable exports 2006 (\$ million, fob)**Vital Vegetables® - a multi-partner, trans-Tasman programme**

Vital Vegetables®, is a research programme targeting development of vegetables that contain increased levels of health-giving substances. The first of these is a broccoli cultivar high in a compound known to have cancer-fighting properties, due to be test-marketed to supermarkets in 2007. Other 'super' vegetables such as capsicums, potatoes and onions are planned.

The Vital Vegetables® initiative seeks to better understand the health-giving properties of vegetables, and deliver these to consumers. It brings together Horticulture New Zealand, Crop & Food Research, Ausveg (Australian Vegetable and Potato Growers Federation Inc), Horticulture Australia, and the Department of Primary Industries, Victoria.

Research is targeted in a number of areas including the identification and measurement of phytochemicals known to promote good health, retaining phytochemicals during processing, the exploration of possible health components contained in non-digestible parts of vegetables and understanding freshness and flavour.

**Investment in the horticultural industries**

	Crop area (ha)	On-farm (\$ million)	Off-farm (\$ million)
Apples, pears & nashi	9,839	748	748
Wine grapes	22,616	4,071	12,213
Kiwifruit	11,464	3,783	757
Summerfruit	2,325	70	70
Avocados	3,400	102	102
Citrus	1,702	51	51
Berryfruit	2,541	76	76
Nuts	1,841	55	55
Olives	2,485	75	75
Other subtropical fruit	760	23	23
Hops	370	37	111
Other fruit	174	5	5
Total fruit	59,517	9,096	14,285
Potatoes	11,717	205	308
Peas & beans	9,493	166	332
Onions	4,855	85	85
Squash	6,325	111	111
Sweetcorn	7,115	125	249
Broccoli, cabbages & cauliflowers	3,504	61	61
Carrots	1,450	25	25
Asparagus	810	14	28
Lettuce	1,207	21	32
Other vegetables	9,876	173	259
Total vegetables	56,352	986	1,490
Protected - high tech	55	83	25
- greenhouse tomatoes	120	300	90
- low/medium tech	423	296	89
Total horticultural	116,467	10,797	16,090

Sources: Statistics NZ - Agricultural Production Survey 2005; MAF Horticulture, Pipfruit & Arable Monitoring Reports 2006; New Zealand Winegrowers Annual Report 2006; ZESPRI Group Ltd Report 2005-06.

- Total investment in horticulture exceeds \$26 billion.
- Horticultural enterprises represent a significant capital investment on farms, orchards & greenhouses of about \$10.8 billion in land, buildings and equipment.
- The off-farm capital investment to package, process and transport the products to the nearest port and/or domestic market, at \$15.8 billion, is significant.
- The ratio of on-farm to off-farm investment varies across the individual sectors. Kiwifruit off-farm investment is about 20% of on-farm investment, whereas wine approaches 300% of on-farm investment.
- Horticultural enterprises operate at many scales. Off-orchard pack houses and processing plants allow many small holdings to be economic for growers. This structure encourages new grower entrants.

Distribution of fruit by Regional Councils (ha)

Regional Council	Apples	Wine grapes ^a	Kiwifruit ^b	Summerfruit	Avocados	Citrus	Berryfruit	Nuts	Olives	Other subtropical	Other fruit & hops	Total fruit
Year ended 30 June	2006	2006	2005	2002	2006	2002	2002	2002	2005	2002	2002	2002
Northland	0	30	506	25	901	633	4	202	C	150	44	2,495
Auckland	36	474	528	82	57	296	213	309	270	184	90	2,539
Waikato	227	132	411	44	54	43	492	146	C	77	95	1,721
Bay of Plenty	3	18	8,830	47	1,789	253	60	154	C	162	62	11,378
Gisborne	152	1,913	265	12	C	695	0	C	C	80	29	3,146
Hawke's Bay	5,681	4,346	163	1,063	C	68	26	25	430	19	291	12,112
Taranaki	0	0	25	2	C	5	C	C	C	52	C	84
Manawatu-Wanganui	23	0	79	30	C	21	43	60	C	28	97	381
Wellington	104	777	21	67	C	6	26	46	290	9	56	1,402
Tasman-Nelson	2,341	695	636	90	C	14	693	58	120	5	656	5,308
Marlborough	15	11,488	0	163	0	3	C	63	320	5	82	12,139
West Coast	0	0	0	C	0	0	C	C	0	0	0	0
Canterbury	21	975	0	112	0	C	976	430	510	9	86	3,069
Otago	348	1,253	0	1,122	0	C	15	207	40	0	75	3,060
Southland	C	0	0	C	0	0	C	24	C	0	0	24
Other	49	565	0	56	106	56	206	117	500	40	78	1,773
Total	9,000	22,616	11,464	2,915	2,907	2,093	2,754	1,841	2,480	820	1,741	60,631
1996	15,819	6,110	10,210	2,692	946	1,919	1,691	na	na	728	1,846	
% change	-43%	270%	12%	8%	207%	9%	63%	na	na	13%	-6%	

C - Some data have been suppressed for reasons of respondent confidentiality. "Other" region includes data not assigned to a specific region.
Sources: Statistics NZ - Agriculture Census 2002 & Agriculture Production Survey 2005. "Pipfruit NZ Inc." "New Zealand Winegrowers Annual Report 2006." "Zespri Group Ltd Annual Report 2005-06." "NZAGA & Avocado IC Annual Report 2006."
Note: There may be some variations between the data reported in this section with those reported for the individual horticultural sectors. This is attributed to factors such as differences in sampling times, working definitions and the number of respondents. For some crops the planted areas have not reached full production.

Distribution of vegetables by Regional Councils (ha)

Regional Council	Potatoes	Peas & Beans	Onions	Squash	Sweetcorn	Broccoli	Carrots	Asparagus	Lettuce	Other veg	Total veg
Year ended 30 June	2005	2005	2005	2006	2002	2002	2002	2002	2002	2002	2002
Northland	C	6	C	17	66	75	C	C	19	1,137	1,320
Auckland	900	40	1,390	0	66	779	180	C	397	818	4,570
Waikato	2,450	C	1,870	233	130	332	C	560	111	423	6,109
Bay of Plenty	C	C	C	232	39	13	C	234	6	27	551
Gisborne	C	9	C	2,191	2,059	C	0	0	C	76	4,335
Hawke's Bay	900	654	770	2,457	1,821	127	24	449	48	698	7,948
Taranaki	C	C	C	0	9	C	C	125	C	C	134
Manawatu-Wang.	1,870	1,073	220	1,036	60	459	868	400	96	536	6,618
Wellington	C	1	C	59	31	123	C	C	77	119	410
Tasman-Nelson	C	C	10	0	8	159	3	13	79	74	346
Marlborough	C	877	30	0	842	C	60	C	C	183	1,992
West Coast	0	C	0	0	0	C	C	0	C	C	0
Canterbury	4,560	5,418	760	100	1,248	415	343	166	133	495	13,638
Otago	80	33	C	0	C	287	24	C	84	135	643
Southland	C	C	C	0	C	5	C	C	C	92	97
Other	270	997	180	0	5	972	329	68	237	876	3,934
Total	11,030	9,108	5,230	6,325	6,384	3,746	1,831	2,015	1,287	5,689	52,645
1992	9,695	5,893	2,925	4,366	3,485	3,309	1,221	2,453	861	4,212	39,130
% change	14%	55%	79%	44%	83%	13%	50%	-18%	49%	35%	35%

See above notes

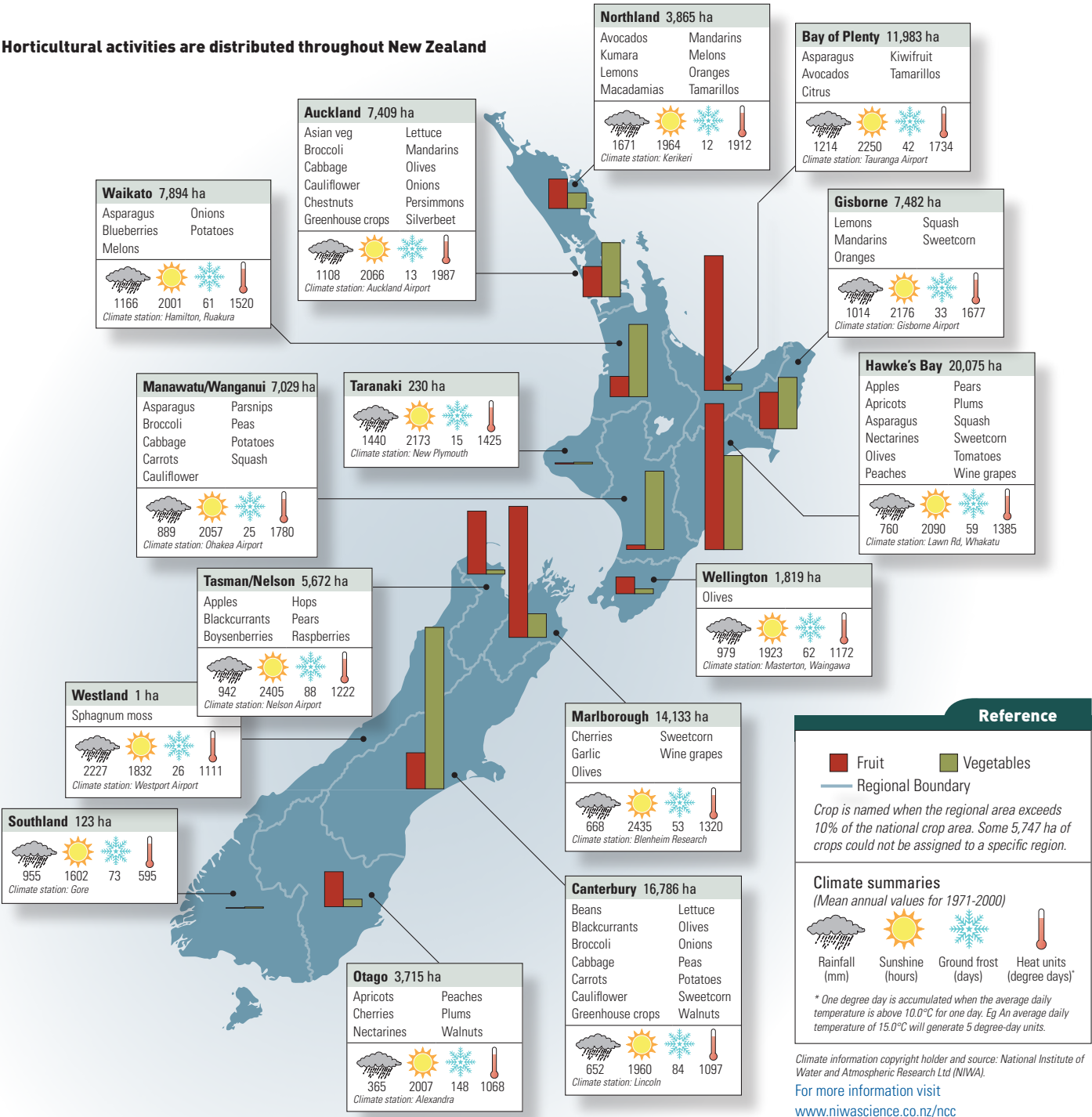
For more information visit www.maf.govt.nz

Distribution of indoor crops (m²; 000s)

Tomatoes	Capsicum	Cucumber	Nursery	Orchids	Other indoor crops
2002	2002	2002	2002	2002	2002
46	22	30	54	146	211
994	287	301	241	156	1,021
149	17	95	51	73	257
25	33	C	52	127	303
C	C	C			14
85	8	C		C	56
C	C	13	32	23	49
36	6	2	37	49	174
21	C	C	8	C	41
88	15	32	8	C	40
C	C	6	2	C	10
C	C	C	C	C	10
153	32	52	185	20	345
14		C	6	C	97
5	C	C	11	C	
49	14	19	226	26	67
1,665	434	550	913	620	2,695
920	82	68	477	307	637
181%	529%	809%	191%	202%	423%

(1 ha = 10,000 m²)

Horticultural activities are distributed throughout New Zealand

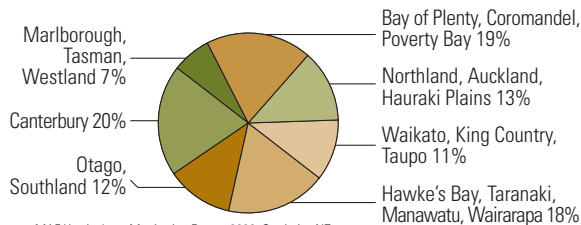


BEES

A vital contributor to horticulture

- Bees pollinate crops and play a big part in their yield.
- Honey production was above the 6-year average production of 9,180 tonnes. The average yield was 35 kg/hive.
- Honey exports exceeded \$38 million in 2006. UK is the largest market (\$13m) and exports to Australia, Japan and Singapore each exceed \$4m. Domestic honey consumption is about 5,000 tonnes.
- Some 300,569 hives, owned by 2,707 beekeepers.

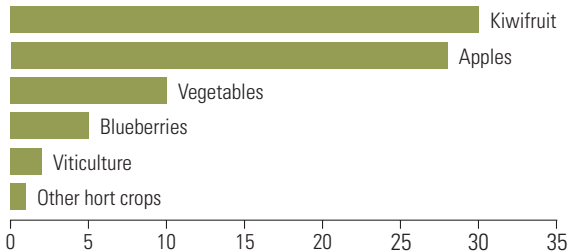
New Zealand honey crop (10,423 tonnes)



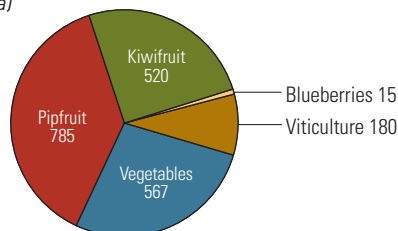
Source: MAF Horticulture Monitoring Report 2006, Statistics NZ.

ORGANIC PRODUCTION

Value of organic horticultural crops 2006 (\$ million)



Organic horticultural crops - area certified and under conversion (ha)



Source: Organics Aotearoa New Zealand.

GRADING & HANDLING

Intelligent technologies ensure quality



Eager to ensure that their produce reaches distant markets in peak condition and sells at premium prices, New Zealand horticulture marketers demand the highest quality. This has been a catalyst in the development of world leading technologies in superior grading and handling equipment. Most have had funding assistance from Technology New Zealand for research and development. This has produced technologies such as machine vision processes for automated inspection and sorting using electronic cameras and computers running specialised software. Class leaders include:

- In pipfruit, stonefruit and citrus: Compac Sorting Equipment exports to over 24 countries. Compac machines reliably sort produce by weight, size, colour, shape, density, blemish or defects by taking up to 25 photo-stitched images of each item and weighing each 250 times – all at the rate of up to 15 items per second on each lane. Compac machines process over 55 million cartons p.a. of apples for Washington State (USA) producers, (NZ export production is about 15 m cartons).
- In soft berry fruits: BBC Technologies, who dominate in berryfruit sorting and packing, are featured on page 13.
- In root vegetables machines from Christchurch based Wyma Engineering Ltd are now used in over 23 countries with examples being carrot washing lines installed in Switzerland and also in Oman 'for preparing carrots grown in the desert and exported to Japan'.
- In asparagus: Oraka Technologies of Cambridge are leaders in the automation of the difficult to grade asparagus crop. Their leading technologies have been applied to both high labour cost countries and low labour cost economies such as the Philippines and Peru.

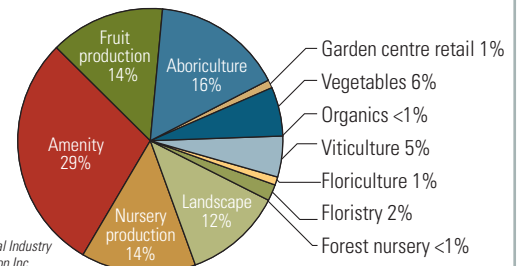
With combined export earnings of over \$55 million and up to 90 percent of production exported to much larger markets, these horticulture sector technology leaders are projected to increase their exports significantly.

For more information visit www.compacsort.com, www.wymaengineering.co.nz, www.oraka.co.nz see also case study at www.growingfutures.com

HORTICULTURAL TRAINING

Trainees by category (as at 30 September 2006)

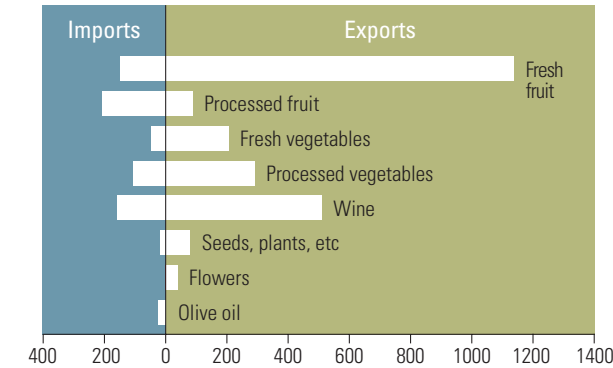
Horticultural trainees are increasing - up to 1,671 trainees in 2006 from 763 in 2001.



Source: Horticultural Industry Training Organisation Inc.

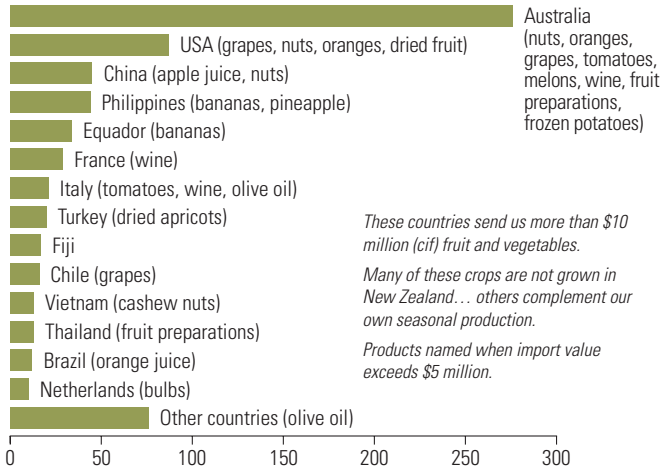
For more information visit www.hortito.org.nz

Comparisons of imports and exports (\$ million)



Source: Statistics NZ.

The origin of fruit and vegetable imports (\$ million, cif)



These countries send us more than \$10 million (cif) fruit and vegetables.

Many of these crops are not grown in New Zealand... others complement our own seasonal production.

Products named when import value exceeds \$5 million.

Source: Statistics NZ



Horticulture New Zealand
– strength in unity

Established In 2005 as a new representative body to provide a united voice and advocate for the industry, Horticulture NZ represents the country's 7000 fruit and vegetable growers. Born of a realisation that New Zealand's fruit and vegetable sector is facing new opportunities and challenges that require a strong united voice, Horticulture New Zealand combines the resources and expertise of the former NZ Vegetable and Potato Growers, NZ Fruitgrowers and NZ Berryfruit Growers Federations, in a single organisation.

Horticulture NZ presents a nation-wide voice on important issues such as border security, trade policy, resource management plans, compliance costs and food regulations. It champions a number of causes crucial to the continued growth of the sector, such as (i) industry leadership, (ii) industry profile, (iii) the right to grow and farm, and (iv) having a positive business environment.

For more information visit www.hortnz.co.nz



New Zealand Trade & Enterprise
– promoting exports to the world

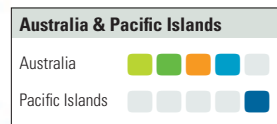
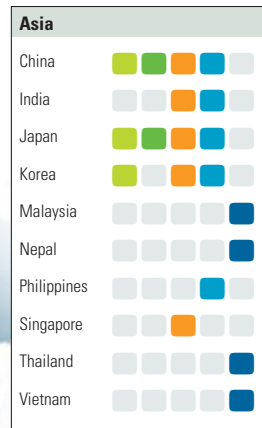
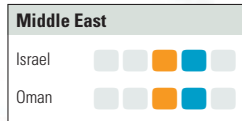
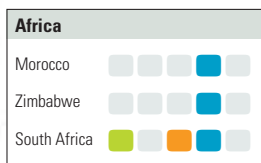
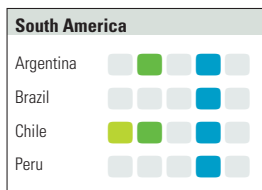
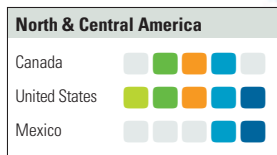
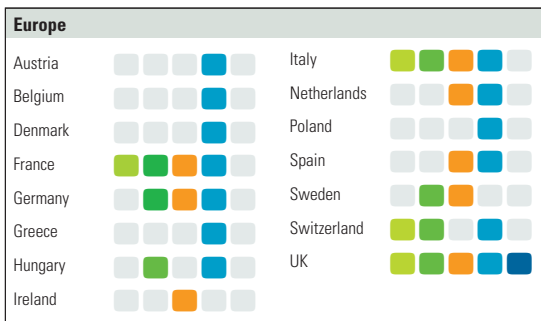
New Zealand Trade and Enterprise (NZTE) is the New Zealand government's national economic development agency with a focus on industries and sectors where New Zealand has a long-term sustainable advantage and high growth potential. The food and beverage sector, which includes horticulture, meets this profile with New Zealand's wine, fruit and vegetables symbolising freshness, vitality and innovation.

NZTE helps many of New Zealand's horticultural exporters in new markets through programmes ranging from market development grants to events designed to introduce New Zealand companies to potential customers and partners.

NZTE initiatives include sponsored trade shows such as the New Zealand Focus Centre, in collaboration with Shangri-La Hotels and Resorts, and the network of Food and Wine Ambassadors, showcasing New Zealand's top wine and produce companies to consumers, retailers, and foodservice customers.

For more information visit www.nzte.govt.nz





Global reach of New Zealand horticultural industries

New Zealand not only exports produce, but also horticultural technology and knowledge. Carefully protected by patents and plant variety rights, New Zealand-developed production systems, machinery and plants are a further valuable source of export earnings.

Reference




Fruit produced in third countries

- | | | |
|---|--|---|
|  | Fruit from New Zealand cultivars are grown under contract specification by orchardists in three countries for sale in New Zealand's global markets. Examples are ZESPRI™ Gold kiwifruit and ENZA's JAZZ™ apples. |  |
|  | Licencees distribute New Zealand bred horticultural cultivars in many countries. Examples are blueberries, apricots, pipfruit, <i>Actinidia</i> aguta, blackberries, raspberry and poplars. Products and processes such as packaging and gel herbicides are also licenced to offshore users. | |

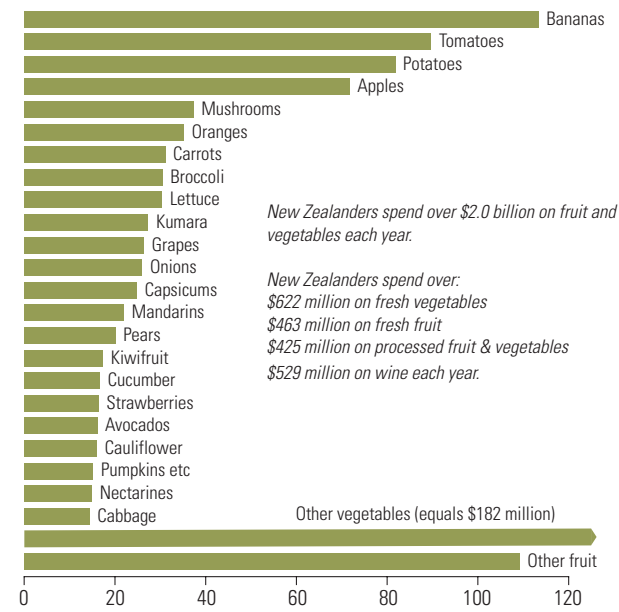
International R&D collaborations

- Strong linkages with key R&D institutes overseas provide valuable knowledge input to innovative horticulture research for New Zealand.

Intelligent technologies

- | | | |
|---|--|---|
|  | <p>Exports of 'Intelligent' sorting and grading technologies and also decision support technologies for crop management such as the 'Aspire' system developed by Crop & Food Research for asparagus growers.</p> |  |
|  | <p>Technology assistance in horticultural production systems is provided to several countries including via official aid programmes.</p> | |

New Zealand consumer spend on fruit and vegetables (\$ million)



Source: Statistics NZ - Household Economic Survey for year ended 30 June 2004.

Trends that impact on New Zealand's horticultural foods

- 1. Consumer power:** Products will be influenced by marketers and others striving to meet the demands of increasingly sophisticated consumers.
- 2. Convenience rules:** 'Convenience foods' can be eaten on the move and are quick for home cooking – but concern that they should be healthier.
- 3. Increasing customisation of food:** People are expecting food to be designed to suit their time, energy, health and leisure needs.
- 4. Health as a driver of food consumption:** Public health legislation is shifting in support of food products to enhance human health and wellness.
- 5. Environmental sustainability:** Horticulture programmes are combining economic criteria (eg yield and quality) with environmental criteria (eg sustainability and producer welfare).
- 6. Food safety:** Consumers want to know that their food is safe. Food certification and tracking products from source to consumer is increasing.
- 7. Increasing competition:** Traditional international trade barriers are being lowered, and more global competition will result.
- 8. BioDigital:** Information technology, combined with other new technologies, will enable biological systems to be monitored and managed using real-time decision making.
- 9. Convergence of sectors:** Convergence of food, health and biotechnology will result in new products, with eg moves to produce functional or fortified foods/nutraceuticals, and introducing vaccines through food products.

A mix of fruit and vegetables adds value to daily health



New Zealanders consume an estimated \$2.5 billion of fruit and vegetables. In general terms we export more fruit than we eat, but we eat more vegetables than we export. This diet is complemented by imports of other fruit and vegetables especially those that cannot be grown in temperate New Zealand.

NZ Ministry of Health guidelines recommend five or more servings of fruit and vegetables each day, and one of the most successful programmes to get this message across is 5+ A Day, launched in New Zealand in 1994. 5+ A Day programmes now run in about 28 countries. The New Zealand programme has many innovations that have resulted in requests for presentations overseas including to the FAO.

The 5+ A Day objective is for all New Zealanders to enjoy a balanced diet that includes deeply coloured fruits and vegetables that provide the vitamins, minerals, fibre and phytochemicals needed to maintain good health, protect against the effects of ageing and reduce the risk of cancer and heart disease.

For more information visit www.5aday.co.nz & www.crop.cri.nz



Food and wine tourism



Tourism plays a significant role in the New Zealand economy. Tourism depends on horticulture for part of its delivery as tourists spend approximately 12% of their expenditure on food and beverage services (compared with 9% on accommodation).

The New Zealand Food and Wine Tourism Network was established in 2004 with the aim of developing 'more reasons to visit more regions', by combining food and wine experiences with other regional icons. Twenty one Wine & Food Festivals are currently held around the country from November through April, helping draw visitors into the horticultural regions.

A large number of wineries now cater for visitors - of whom about one third are from overseas. Across the ten main wine growing regions in New Zealand, each displaying a great diversity in climate and terrain, 225 wineries have cellar door wine tasting outlets, 82 have cafes or restaurants and over 57 offer accommodation. In total over 236 wineries have visitor facilities.

Source: New Zealand Wineries' Survey; 2003, Christensen, Hall and others, University of Otago; Cuisine Wine Country, www.cuisine.co.nz

For more information visit www.wtn.co.nz and www.cuisine.co.nz

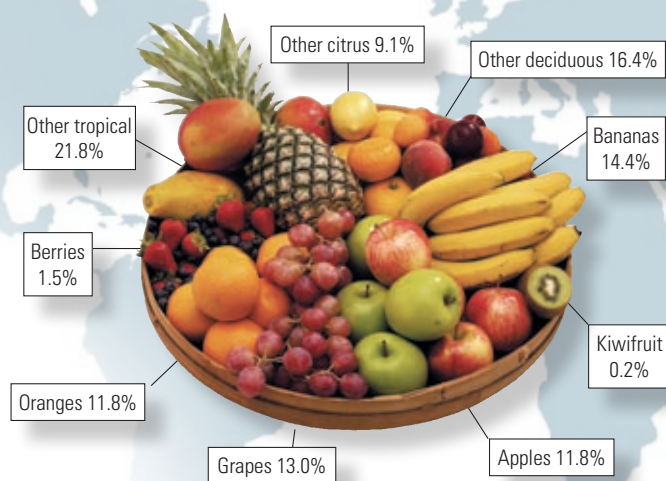


New Zealand's place in the global fruit and vegetable scene - 2005

The world's fruit bowl is very large and the world's vegetable bowl is even larger. For both fruit and vegetables only a small percentage of total production is traded internationally. New Zealand is a small player and targets niche markets.

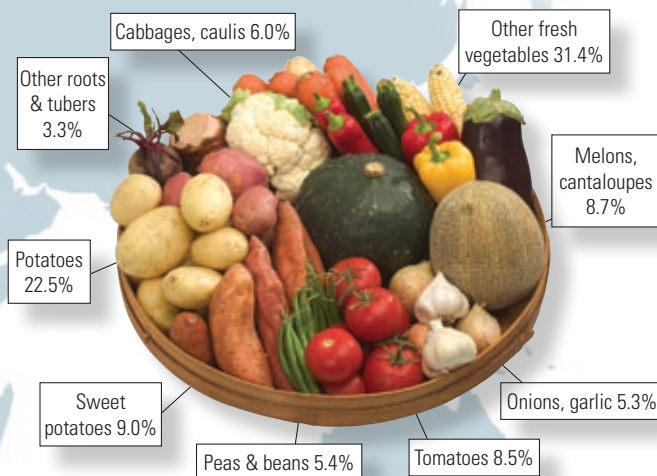
The quantities of New Zealand's fruit and vegetable exports are only a small percentage of international trade in each sector. New Zealand kiwifruit exports represent over 35% of world trade, frozen sweet corn about 10%, apples, squash and onions 3 to 5%; and capsicums, frozen potatoes, avocados and blueberries each exceed 1%.

The world fruit bowl (505 million tonnes)



Source: FAOSTAT Agriculture Data. www.faostat.fao.org

The world vegetable bowl (1,438 million tonnes)



Source: FAOSTAT Agriculture Data. www.faostat.fao.org

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