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New Zealand

Exporter Guide

Annual

2008

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Report Highlights:
In CY 2007, New Zealand imports of U.S. consumer-oriented products reached a record $155 million, up 25% from the previous year. With a 10% market share, the United States is the second largest supplier of consumer-oriented products to New Zealand after Australia. Leading imports from the United States include fresh fruits, food preparations, pet food, frozen pork, lactose products, nuts, dried fruits, and condiments. Given the size of the market and the ease of doing business, New Zealand tends to be a good fit for small to medium sized companies and new-to-export companies.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Wellington [NZ1]
[NZ]

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SECTION I: MARKET OVERVIEW

Overview

Comparable in size to Colorado, New Zealand is an island country with a population of 4.26 million people. It is a largely urbanized society with over half of the population residing in the four largest cities: Auckland, Wellington, Christchurch and Hamilton. Approximately one-third of New Zealanders live in Auckland. *(Source: Statistics New Zealand, June 2007)*

New Zealand has an increasingly multi-cultural population. According to the 2006 census, which is the latest available data, approximately 68% of the population is of European descent, down from 83% in 1996. The Mäori are the largest ethnic group accounting for just under 15% of the total population, followed by Asian New Zealanders at 9%, and Pacific Island New Zealanders at 7%. The Asian ethnic group is growing the fastest, up 50% from the 1996 census. The Pacific Island ethnic group is growing at the second fastest pace, up 8% from 1996. According to June 2008 estimates, approximately 21% of the population is under the age of 15 and 12.5% is over the age of 65. The median age in New Zealand is 36.3. In December 2007, net migration was 5,491 individuals with 77,081 departures and 82,572 arrivals. (*Source: Statistics New Zealand)*

Population Summary of New Zealand (2006 Census-latest data available)			
Ethnic Group	**1996**	**2001**	**2006**
European	2,879.085	2,871,432	2,609,592
Maori	523,371	526,281	565,329
Pacific Peoples	202,233	238,801	265,974
Asian	173,502	238,176	354,552
Middle eastern, Latin American and African	-	-	34,743
Other Ethnicities	16,422	24,993	430,881
Total	**3,466,587**	**3,568,731**	**3,860,163**

Source: Statistics New Zealand

Quick Facts (2008/June Year)	
Population	4.26 million
Real GDP Growth	3%
Unemployment Rate	3.9%
Consumer Price Inflation	4.0%

Source: Statistics New Zealand

Income Facts (2006/March Year)	
Income Groups	**Average Income**
Median Income	NZ $24,400 (US$ 17,080) (up 32% from 2001)
Median Income for Men	NZ $31,500 (US $22,050)
Median Income for Women	NZ $19,100 (US$13,370)
Median Family Income	NZ $59,000 (US $41,300)

Source: Statistics New Zealand

The retail grocery market in New Zealand is well developed with supermarkets, small-scale grocery stores, fresh food specialty stores and convenience stores in all the major population centers. New Zealand's retail grocery sales during calendar year 2007 were valued at over NZ $16.7 billion (US $11.7 billion). The majority of retail grocery sales, nearly NZ $12 billion (US$8.4 billion) are made through supermarkets. *(Source: Coriolis Research)*

New Zealand's imports of consumer-oriented agricultural products reached US $1,615 billion in CY 2007. Australia is New Zealand's largest supplier with a 49% share, followed by the United States (9.6%) and China (4%). Leading consumer-oriented exports from Australia to New Zealand include wine, food preparations (including food crystals, powders, nut pastes etc.), snack foods, cookies, cakes, pastries and meat products. Leading exports from the United States include fresh fruit, food preparations, pet food, frozen pork products, lactose products, nuts, dried fruits and sauces/condiments. New Zealand consumer-oriented imports from China are expanding rapidly, up from US$ 39 million in 2005 to US$ 67 million in 2007. Leading New Zealand imports from China include apple juice, sugar confectionery products, peanuts, frozen/cooked vegetables, prepared peaches, baked bakery products, pasta, garlic, fresh/dried nuts, various food preparations and garlic. *(Source: Global Trade Atlas)* New Zealand's recent free trade agreement with China, which will come into effect in October 2008, will likely result in increased imports from China.

Trade Important to the New Zealand Economy

Agriculture is the cornerstone of the New Zealand economy accounting for approximately 5% of GDP (16% when processing and other downstream activities are included). The majority of dairy, meat, wool, wine, apples, kiwifruit and other agricultural products produced in New Zealand is exported. Heavily reliant on trade, exports account for approximately 20% of New Zealand's GDP. Agricultural products account for 56% of total exports. Dairy has become increasingly important to the New Zealand economy and dairy products now account for over a quarter of total exports.

New Zealand's total merchandise exports reached $27.3 billion in 2007. Australia, the United States and Japan are the top three markets for New Zealand products, and have been since the mid-1980s. However, China is growing in importance and is now the fourth largest export destination for New Zealand. Leading exports include dairy products, meat products, logs and wood products, machinery and aluminum.

New Zealand's imports reached $31.4 billion in 2007. Leading suppliers to the New Zealand market are Australia (21%), China (12%) and the United States (11%). China surpassed the United States as the second largest supplier in 2006. Oil is New Zealand's largest import, accounting for 14% of total imports. Other significant imports include machinery, motor vehicles and electrical machinery, which, taken together, account for approximately 32% of total imports.

New Zealand Announces FTA with China

New Zealand currently has four free trade agreements (FTAs) in force - The Closer Economic Relations Agreement with Australia (1983), an agreement with Singapore (2001), an agreement with Thailand (2005), and the P-4 Agreement with Singapore, Chile and Brunei (2005). In April 2008, New Zealand became the first OECD country to sign an FTA with China. This agreement will come into force in October 2008. New Zealand and Australia are expected to formally announce a free trade agreement with ASEAN countries in December 2008. New Zealand is also currently negotiating free trade agreements with the Gulf Cooperation Council, Hong Kong and Malaysia.

Food Prices Up Significantly

Soaring food prices are making front page news in New Zealand and there is growing concern regarding the affordability of food. Food prices rose 8.2% in the year to June, joining forces with soaring oil prices to push inflation up to 4%. According to official reports, the rise in the food price index is the highest in eighteen years. On an annual basis, grocery food was up 12.1% and, within this category, milk was up 22%, cheddar cheese 62%, butter 87% and bread 15%. Fruit and vegetables were up 9% for the year while meat, poultry and fish were up 4.4%. The food price index makes up just over 17% of the consumer price index.

Advantages and Challenges for U.S. Consumer Food Exporters

Advantages	Challenges
Familiar business and cultural environment and no language barriers to overcome.	New Zealand labeling laws are different from those in the U.S.
U.S. products enjoy a quality reputation along with their novelty status although competition is tough.	Growing competition from China in the consumer-oriented food category.
Minimum barriers to trade including low tariffs ranging between 0 and 7%.	Strict phytosanitary/sanitary regulations with regard to fresh produce and meats.
Opportunities to market U.S. fresh products during New Zealand's off-season due to the counter seasonal nature of the markets.	Consumer foods imported from Australia are duty free, while U.S. products are assessed tariffs between 0 and 7%. Canadian products have preferential tariff treatment.
Ease of doing business and size of market make it a good fit for new-to-export and small to medium companies.	New Zealand retail market is highly consolidated and dominated by two supermarket chains.

SECTION II: EXPORTER BUSINESS TIPS

- New Zealand is a well-developed, sophisticated market.
- Establishing good working relationships with importers/distributors is key to entering the New Zealand marketplace. Approximately 90% of all imported food products are purchased and distributed within New Zealand by importers/distributors.
- Tariffs assessed on U.S. food products range from zero to 7%. Tariff rates can be checked at the following link Working Tariff Document of New Zealand on the New Zealand Customs website.
- General sales tax (GST) on domestic and imported products is 12.5%.
- The cost of international freight is generally a fairly significant percentage of the final cost of a product. U.S. exporters can contact freight forwarders in the United States to determine transportation cost. Alternatively, New Zealand importers and distributors can also arrange shipment with the help of customs brokers in New Zealand.
- High quality products with innovative packaging and unique features that are price competitive tend to do well in the New Zealand market.
- New Zealand supermarkets mainly purchase imported products from importers and distributors rather than importing directly. In the case of Foodstuffs, interested U.S. exporters should contact each of the regional offices directly as they can make buying decisions independently of each other. (Please see Section V for contact information)
- Fresh U.S. produce is an especially welcome addition to New Zealand retail shelves during winter in the Southern Hemisphere.
- Innovative, environmentally-friendly packaging has an advantage in retail food

products.

- New Zealand labeling and nutritional laws are different from those in the U.S. U.S. exporters are encouraged to review the Food and Agriculture Import Regulations and Standards (FAIRS) report for New Zealand which contains detailed information on New Zealand's food standards, labeling requirements, import regulations, etc. This report can be viewed at the following site: http://www.fas.usda.gov/scriptsw/attacherep/default.htm
- In December 2001, mandatory-labeling requirements for genetically modified foods (foods produced using gene technology) came into effect in New Zealand. The requirements are covered in Genetically Modified Foods of the joint New Zealand Australia Food Standards Code.

SECTION III: MARKET STRUCTURE AND TRENDS

Market Structure

Two supermarket chains, Foodstuffs (NZ) Limited and Progressive Enterprises Limited, dominate the New Zealand retail sector, which is valued at NZ $16 billion (US $11.2 billion). Foodstuffs (NZ) Ltd. has a 57% share of the New Zealand grocery market and Progressive Enterprises has a 42% share. A new entrant, Warehouse Extra, holds a 1% share of supermarket sales.

New Zealand Retail Market Distribution

Supermarket Group	Ownership	Market Share	Store Names
Foodstuffs (NZ) Ltd	New Zealand owned; made up of three independently owned co-operatives	57%	▪ New World- Full service supermarkets ▪ Pak'n'Save- Foodbarn/retail food warehouses ▪ Write Price- Foodbarn/retail food warehouses ▪ Four Square- Convenience grocery stores ▪ On the Spot- Convenience stores
Progressive Enterprises	Owned by Woolsworths Limited (Australia)	42%	▪ Woolworth- Full service supermarkets ▪ Foodtown- Full service supermarkets ▪ Countdown- Discount supermarkets ▪ Supervalue- Conveniece grocery stores ▪ Fresh Choice-Fresh and gourmet food stores ▪ Woolworth Quick & Micro- Convenience stores
The Warehouse Group	New Zealand Owned	1%	▪ Warehouse Extra

Foodsuffs (NZ) Limited is one of the largest grocery distributors representing 633 stores in New Zealand (including 44 Pak N Save; 132 New World; 285 Four Square; On the Spot 148; 3 Write Price stores; 2 Shoprite; 3 Duffy & Finns; and 16 Henry's Beer Wine and Spirit nationwide). The marketing organization of Foodstuffs Limited consists of three regionally based, retailer-owned cooperative companies, along with their parent company Foodstuffs (NZ) Ltd. The three cooperatives are: Foodstuffs (Auckland) Co-operative Society Limited, which covers the middle to upper North Island; Foodstuffs (Wellington) Co-operative Society Ltd, which covers the southern half of the North Island; and Foodstuffs (South Island) Co-operative Society Limited, which covers the entire South Island. Interested U.S. exporters should contact each of the regional Foodstuffs offices as they make buying decisions independently of each other. (Please see Section V for contact information.)

Progressive Enterprises Limited (a subsidiary of the Australian company Wooldworths Limited) has a 43% share of the New Zealand grocery market. Progressive Enterprises has 63 Woolworths stores, 30 Foodtown, 55 Countdown, 31 Supervalue, 12 Fresh Choice, and 22 Woolworths Micro and Quickstop convenience stores. All import purchasing decisions are made at its headquarters in Auckland. (Please see Section V for contact information.)

In 2007, the Warehouse group announced its expansion into the New Zealand grocery sector under a banner called Warehouse Extra. The Warehouse group has large general merchandise stores located nationwide. In addition to general merchandise, Warehouse Extra offers grocery products, including fresh produce. Warehouse Extra's first store was in Auckland. Since then, they have expanded to other cities including Whangarei and Hamilton.

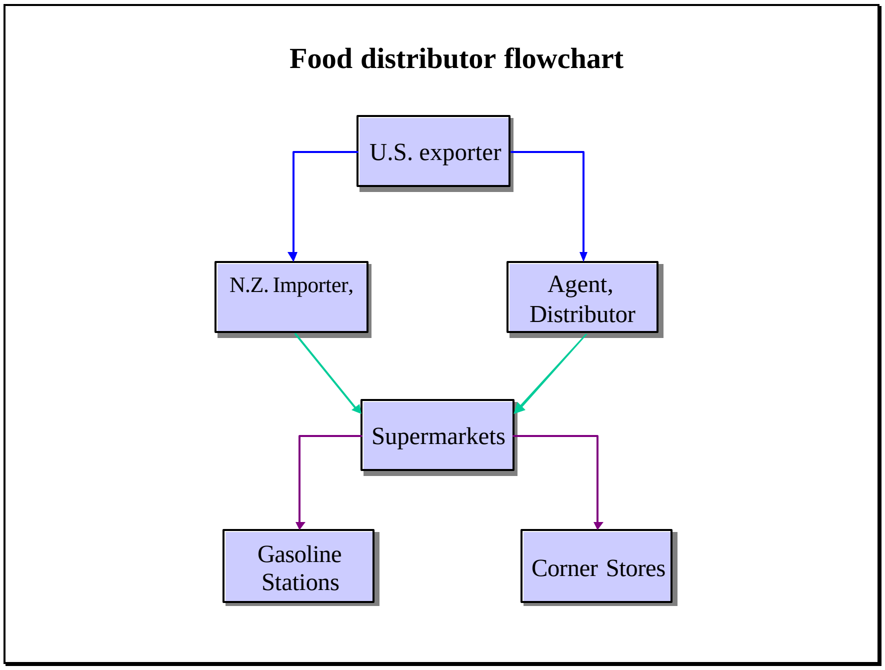
U.S. exporters interested in supplying the New Zealand market can work with importers, distributors or import brokers who can target food category/merchandise managers at major wholesalers and supermarkets chains. Approximately 90% of all imported food products are purchased and distributed within New Zealand by importers/distributors.

- *Importers:* An importer takes the ownership of the product and handles warehouses and customs clearance. They have an established distribution channel to sell the product to the retailers/restaurant industry.

- *Distributors:* Generally distributors represent branded retail products and usually do not take ownership of the product. Large distributors have their own sales team to market the product. Distributors also handle after sales promotion like advertising and in-store promotions, at the request of exporters.

Indicative margins (as a guide only) for New Zealand importers/distributors are as follows:

-Importers:	5-20% of gross margin (i.e. percent of wholesale value)
-Distributors:	10-30% of gross margin (if funding promotional activities)
	10-20% of gross margin (if not funding promotional activities)
-Supermarkets:	15-20% of the wholesale value (depending on the category)
-Independent Grocers:	30-40% of the gross margin



Market Trends

- New Zealand Ministry of Health's 2006/2007 survey of more than 17,000 people revealed that one in three (36%) adults were overweight and a further one in four (27%) were obese. Of children aged two to 14, 68% had a body mass considered normal, 20.9% were overweight and 8.3% were considered obese. (NZ Herald, Sept, 2008)
- In June 2007, average household weekly food expenditure in New Zealand was reported to be NZ$156 (US$109), which is equivalent to 16% of the total household weekly expenditure. *(Source: Statistics New Zealand)*
- Consumers are using a wider variety of channels when shopping for their groceries. AC Nielsen's November 2007 survey showed that in 2006, New Zealand consumers bought 89% of their groceries through supermarkets, 4% through fruit and vegetable shops, 3% through fish/butcher shops, 1% each through liquor stores, ethnic supermarkets, online shopping and large discount stores. *(Source: Grocers Review, November 2007)*
- Due to the economic slowdown and health concerns in New Zealand, consumers are opting for healthy foods which are perceived as value-for-money including private-label products and healthy frozen products. *(Source: Statistics New Zealand)*
- Private-label products continue to grow in the New Zealand supermarket industry. In June 2008, private label accounted for 16% of packaged products and are growing at the rate of 9% per year. Private label has over a 20% share in the chilled food category. *(Source: FMCG, March 2008)*
- In the quest for convenience and health, consumers are opting for more frozen foods. Frozen fruit category sales reached NZ $9.1 million (US $6.3 million) in February 2008, a 26% jump over 2007. Other frozen food growth categories were fish fillets at NZ $22.5 million (US $15.8 million) and frozen poultry at NZ $98.5 million (US $69 million). (Source: FMCG, March 2008)
- The FMCG food magazine (October 2008) reported that consumers are increasingly looking for nutritional and convenient foods and want to know that food is from a reputable source. It also reported that consumers have environmental awareness in

the form of concerns about food miles, water efficiency, and the impact of packaging on the environment.

- New Zealand is an increasingly multicultural society, which creates opportunities for ethnic foods including Asian, Mexican, Turkish and Indian.
- Sales of organic products are steadily growing in New Zealand. The domestic market of organic products is estimated to be NZ $259 million. *(Source: Hugh Campbell paper, August, 2007)* U.S. organic products that have potential in New Zealand include packaged grocery items, such as rice milk, sauces, mustard, corn chips, cookies, canned beans and almonds.
- Another growth category in New Zealand is pet snacks. In February 2008, sales in this category reached NZ $9.3 million (US $6.5 million), 10.9% jump over last year. *(Source: FMCG, April 2008)*

Section IV: Best Consumer Oriented Product Prospects

Product Category	Total Imports 2007 (US$ '000)	5 Year Average Annual Import Growth	Import Tariff Rate	Key Constraints over Market Development	Market Attractiveness for U.S.
Fresh Grapes	$20,790	25%	Free	NZ is a small market; competition from Chilean and Australian grapes.	High growth potential. Consumers want fruits to be available year round.
Fresh Fruits *(apricots, cherries, peaches, plums)*	$3,442	17%	Free	Some consumers have a slightly negative quality perception of imported fresh fruits.	U.S. can supply counter-seasonal fruit. Consumers want fruits to be available year round.
Pears	$3,598	26%	Free	Consumer resistance to unfamiliar varieties.	NZ is one of the first markets to get the fresh pear crop.
Citrus Fruit	$17,998	18%	Free	Small market	New Zealand consumers appreciate quality of U.S. citrus.
Fruit and vegetable Juice	$49,982	20%	5-7%	U.S. products are expensive compared to products from some competitor countries.	Value-added juices/ concentrates with health and nutritional benefits have potential to grow.
Processed Fruits & Vegetables	$186,129	16%	0-7%	U.S. products are not always price competitive with product from China and other competitors.	U.S. has a reputation of supplying good quality product. To be successful, product must be price competitive.
Dry Fruit *(dates, figs, raisins)*	$3,195	20%	Free	U.S. is price competitive in raisins; faces tough competition in dates/figs category.	Expanding demand for good quality and healthy foods.
Dry Nuts *(almonds/ walnuts/ pistachios)*	$30,509	23%	Free	Competition from Australia and other countries; need to be price competitive to maintain market share.	U.S. dry nuts are considered high quality. Market share can be expanded if price competitive and promoted as healthy and nutritional snack food.
Snack food *(confectionery, cocoa product, cookiess)*	$195,841	17%	6.5-7%	Australia is a leading supplier. Australia and New Zealand enjoy similar tastes/flavors in snack items.	Strong demand for convenience and snack food.
Breakfast Cereal	$40,459	20%	Free	Strong competition from Australia.	Strong demand.
Pet Food	$58,756	13%	0-7%	Price competitive products from Australia.	Strong demand for premium products.
Wine	$126,200	12%	5%	Lack of importers handling U.S. wines	American style Zinfandel and Cabernet Sauvignon have potential to expand in this market.

Section V: Key Contacts

Foodstuffs (Wellington) Co-operative Society Limited
PO Box 38-896
Kiln Street,
Silverstream
Wellington, New Zealand
Attn: Eve Kelly, Purchase Manager; Andrew Loveridge
Tel: +64-4-527-2510; 04-527-2655
Email: eve.kelly@foodstuffs-wgtn.co.nz

Foodstuffs (South Island) Co-operative Society Limited
167, Main North Road,
Papanui
Christchurch, New Zealand
Attn: Graham May, Purchase Manager
Tel: +64-3-353-8648
Email: gmay@foodstuffs-si.co.nz

Foodstuffs (Auckland) Co-operative Society Limited
PO Box CX12021
Auckland,
New Zealand
Attn: Mr. Tony Olson, Purchase Manager
Tel: +64-4-621-0641
Email: tolson@foodstuffs.co.nz

Progressive Enterprises
Private Bag 93306
Otahuhu
Auckland, New Zealand
Attn: Graham Walker, Business Manager
Tel +64-9-275-2621
Email: graham.walker@progressive.co.nz

Agricultural Affairs Office
Foreign Agricultural Service
U.S. Department of Agriculture
American Embassy
29 Fitzherbert Terrace
Thorndon
Wellington
Tel: +64-4-462-6012
Fax: +64-4-462-6016
Email: agwellington@usda.gov

Food Standards Australia New Zealand (FSANZ)
108 The Terrace
Wellington 6036
New Zealand
Tel: 64-4-978-5631
Fax: 64-4-473-9855
Internet Homepage: http://www.foodstandards.govt.nz

New Zealand Food Safety Authority (NZFSA)
68-86 Jervois Quay
PO Box 2835
Wellington
NEW ZEALAND
Phone: +64 4 463 2500
Fax: +64 4 463 2501
Email: Rebecca.mcgill@nzfsa.govt.nz
Internet Homepage: http://www.nzfsa.govt.nz

Ministry of Agriculture and Fisheries (MAF)
PO Box 2526
Wellington
New Zealand
Tel: 64-4-474-4100
Fax: 64-4-474-4111
Internet Homepage: http://www.maf.govt.nz

Restaurant Association of New Zealand
P.O. Box 47 244
Ponsonby
Auckland, New Zealand
Phone: 64-9- 378-8403
Fax: 64-9- 378-8585
Internet Homepage: http://www.restaurantnz.co.nz

APPENDIX 1. STATISTICS

Table A. Key Trade and Demographic Information

Key Trade & Demographic Information			
Agricultural Imports from All Countries (US$ millions/U.S. Market Share (%)	(2007)	$2,313	8.5%
Consumer Food Imports from All Countries (US$ Millions)/U.S. Market Share (%)	(2007)	$1,615	10%
Edible Fishery Imports from All Countries (US$ millions)/U.S Market Share (%)	(2007)	$89	4.8%
Total Population (Millions)/Annual Growth Rate	(2008)	4.26 million	1.0%
Urban Population (Millions)	(2007)	2.23 m	52%
Number of Major Metropolitan Areas[1]		1	-
Size of the Middle Class (Thousands)[2] / Growth Rate		NA	NA
Per Capita Gross Domestic Product (US$)	(2008)	$29,320	-
Unemployment Rate (%)	(2008)	-	3.9%
Per Capita Food Expenditure (US$)	(2007)	$2,743	-
Percent of Female Population Employed (June 2008)	(2008)		51%
Exchange Rate	(Sept 2008)		US$1 = NZ$1.42

Source: U.N. Database; Statistics New Zealand

1/ Under the definition 'in excess of 1 million' there is only one city - Auckland with a population of 1,321,074. New Zealand has 4 major metropolitan areas (*Provisional* June 2007): Wellington region had a population of (470,300), Christchurch region (546,900), Hamilton region (398,500) and Auckland region (1.39 m).

Table B. New Zealand Consumer-Oriented Food Product Imports

New Zealand Top 15 Ranking	Imports (US$)		
	2005	2006	2007
	1000$	1000$	1000$
Australia	635,132	649,476	785,011
United States	120,305	124,481	155,770
China	39,408	48,390	67,426
Swaziland	46,966	33,667	40,007
Philippines	25,690	29,286	41,659
Italy	25,350	28,342	39,193
Canada	24,928	28,008	38,481
France	26,433	27,099	38,039
Netherlands	21,733	26,026	32,672
Ireland	18,377	24,016	23,919
Thailand	23,225	22,566	28,483
United Kingdom	17,845	20,027	21,812
Fiji	16,277	17,592	20,971
Germany	16,341	15,40	25,593
Turkey	15,006	13,823	16,423
World	**1,252,094**	**1,301,523**	**1,615,614**

Source: Global Trade Atlas

Table C. New Zealand Fish & Seafood Product Imports

New Zealand Top 15 Ranking	Import (US$)		
	2005	2006	2007
	$1,000	$1,000	$1,000
Thailand	29,340	29,526	32,435
China	12,044	14,125	15,041
Canada	6,703	6,616	7,363
Australia	5,844	5,692	5,645
Vietnam	2,521	3,334	5,429
United States	1,770	1,913	4,339
Chile	2,200	2,825	2,897
India	1,208	2,220	2,609
Japan	1,240	1,219	1,776
Argentina	1,042	1,777	1,732
Malaysia	1,542	1,067	1,576
Indonesia	625	738	1,568
Fiji	1,040	1,182	1,341
New Zealand	1,248	3,048	1,184
World	**74,046**	**80,197**	**89,898**

Source: Global Trade Atlas

Table D. New Zealand Imports of Agriculture, Fish & Forestry Products

New Zealand Import *(In Millions of dollars)*	***Imports from the world***			***Imports from the U.S.***			***U.S. Market Share***		
	2005	**2006**	**2007**	**2005**	**2006**	**2007**	**2005**	**2006**	**2007**
CONSUMER ORIENTED FOODS	1,252	1,301	1,615	120	124	125	10%	10%	10%
Snack Foods (Excl Nuts)	150	155	195	03	03	03	02%	2%	2%
Breakfast Cereals & Pancake Mix	32	32	40	240	367	362	0%	1%	1%
Red Meats, Fresh/Chilled/Frozen	82	80	110	11	10	12	13%	12%	11%
Red Meats, Prepared/preserved	23	25	32	03	02	02	15%	7%	8%
Dairy Products (Excl. Cheese)	36	39	56	02	04	05	0%	1%	1%
Cheese	18	16	28	01	03	03	0%	0.2%	0.1%
Eggs & Products	01	02	01	02	01	03	11%	3%	18%
Fresh Fruit	88	91	115	23	24	31	26%	26%	27%
Fresh Vegetables	16	19	22	09	09	09	5%	5%	4%
Processed Fruits and Vegetables	144	152	186	15	14	15	10%	9%	8%
Fruit & Vegetable Juices	31	31	49	02	03	04	8%	9%	8%
Tree Nuts	27	17	30	07	07	08	28%	28%	28%
Wine & Beer	125	126	155	05	03	08	0.4%	0.2%	0.5%
Nursery Products & Cut Flowers	06	06	07	03	04	04	6%	6%	0.6%
Pet Foods (Dog & Cat Food)	48	51	58	18	21	22	50%	47%	39%
Other Consumer-oriented products	417	442	524	32	36	50	7%	8%	9%
Fish & Seafood Products	74	80	89	01	02	04	2%	2%	5%
Salmon	06	06	06	01	01	02	21%	24%	35%
Surimi	07	06	06	01	0	01	1%	0%	2%
Crustaceans	22	22	29	0	0	03	0%	0%	1%
Ground & Flatfish	04	06	06	01	01	03	0%	0%	0%
Molluses	09	10	06	01	01	02	1%	1%	3%
Other Fishery Products	24	27	34	0	0	01	0%	0%	4%
AGRICULTURAL PRODUCTS TOTAL	**1,777**	**1,867**	**2,313**	**164**	**160**	**196**	**9%**	**9%**	**8%**
AGRICULTURAL, FISH & FORESTRY TOTAL	**1,966**	**2,058**	**2,541**	**171**	**168**	**208**	**9%**	**8%**	**8%**

Source: Global Trade Atlas

APPENDIX 2: DOMESTIC TRADE SHOWS

There are three major domestic Food Trade Shows in New Zealand:

1. Foodstuffs Food Show, Palmerston North (August 2009)

This is a trade-only show that exclusively targets Foodstuffs Limited supermarket store owners/buyers and distributors from the Upper North Island and from the South Island. Foodstuffs Limited operates more than 628 supermarkets throughout New Zealand and controls about 57 percent of New Zealand's retail/supermarket food trade. Foodstuffs Food Show 2009 will focus on fresh-produce (including seafood, deli, butchery, fresh produce and bakery). Contact details are:

Foodstuff Food Show
Silverstream
Wellington, New Zealand
Atn: Joanna Fefita
Tel: +64-4-527-2607

2. HospitalityNZ Show and Wine New Zealand, Auckland (August 30-1 September, 2009)

This show attracts hospitality industry contacts and some local food importers/buyers. Around 7,000 visitors attend this show. It takes place every September in Auckland. Contact details are:

The XPO Group Ltd
PO Box 9682 New Market
Auckland, New Zealand
Tel: 64-9-976-8300
Fax: 64-9-379-3358
Email: info@dmgworldmedia.co.nz
Internet Homepage: http://www.hospitalitynz.co.nz

3. Katrina Gordon Show (major metropolitan centers)

This local food show takes place in 16 major cities of New Zealand, including Auckland, Wellington, Christchurch and Queenstown in different months throughout the year. For more information, contact:

Katrina Gordon Trade Shows
PO Box 8647
Christchurch, New Zealand
Tel: 64-3-348-2042
Fax: 64-3-348-0950
Internet Homepage: http://www.kgts.co.nz

4. The Food Show (major metropolitan centers)

The Food Show is a consumer-focused food show. The show runs for four days, and has a preview day for trade and media group. Last year, Auckland show attracted 300 exhibitors and 37,000 visitors. Every year, it takes place in major cities of New Zealand, including

Christchurch, Wellington and Auckland. Next year's Food Show will take place in following cities:

Christchurch, 3-5 April, 2009
Wellington, 15-17 May, 2009
Auckland, July 30-02 August, 2009

For more information, contact:

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APPENDIX 3: RECENT MARKETING REPORTS

Report Number	Title of Report	Date
NZ8018	Food & Agriculture Import Regulation & Standards (FAIRS) Country Report	07/31/2008
NZ8014	Wine Report	07/03/2008
NZ8002	HRI Food Service Report	04/09/2008
NZ7027	Food & Agriculture Import Regulation & Standards Certificate Report	09/30/2007
NZ7029	Retail Report	11/15/2007
NZ7006	Food Processing Sector	03/31/2007