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New Zealand

Exporter Guide

Annual

2004

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Report Highlights:
New Zealand's retail food sector offers U.S. exporters marketing opportunities for a broad spectrum of consumer-ready products. The United States is New Zealand's second largest supplier of processed foods. Total agricultural exports from the United States to New Zealand in calendar year 2003 totaled $157 million, two-thirds consisting of consumer-oriented products. U.S. exports to New Zealand emphasize fresh fruit, processed fruit & vegetables, pet food, snack foods and dairy products.

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

Section I: Market Overview

New Zealand is a well-developed market consists of 4.06 million people, with an annual population growth rate of only about 0.5 percent. It is a largely urbanized society with two-thirds residing in the principal urban areas of Auckland (1.2 million), Wellington (451,600), and Christchurch (344,000). New Zealand population is diverse and multi-cultural. Approximately 80 percent of New Zealanders are of European origin, with around 15 percent Maori, 6 percent Polynesian, 3 percent Asian and 2 percent Indian. New Zealand is an English-speaking country with a strong and stable democracy.

- The United States is New Zealand's second largest trading partner for agricultural products. Total agricultural exports from the United States to New Zealand in calendar year 2003 totaled $157 million, two-thirds consisting of consumer-oriented products. U.S. exports to New Zealand emphasize fresh fruit, processed fruit & vegetables, pet food, snack foods and dairy products.
- The United States holds a 10 percent market share of New Zealand's imported consumer oriented foods and beverages. The U.S. share has declined slightly since 2001, due largely to a strong U.S. dollar.
- New Zealand can be a good export destination for new-to-export companies. U.S. products are seen as being of excellent quality and are usually appealing in the sense that they are "different or new".
- There is an intense price-based competition from domestic products and those from Australia. Australia holds a 52 percent market share for imported consumer foods.
- The retail supermarket sector is dominated by only two companies. Foodstuffs (NZ) Limited, controls about 55 percent of the supermarket trade while Progressive Enterprises, dominates the remaining share.

New Zealand has a market economy with manufacturing and service sectors complementing an export-orientated agricultural sector. Close to one-third of New Zealand's total goods and services are exported. The largest export markets are Australia, United States, Japan and the UK. Australia, followed by the United States, is the largest source of imported foods and beverages.

Economic Growth

- Economic activity in New Zealand was reasonably strong in 2002/03. Real Gross Domestic product (GDP), which is an acceptable indication of market activity, increased 4.4 percent in the year ending June 2004.
- The unemployment rate dropped to 4 percent of the labor force.
- Per capita income is estimated at about US$18,174. The exchange rate as of the end of September 2004 was NZ$1=US$0.67.
- An Average household spends $758 per week on their total expenditure and almost 16 percent of which is spent on food. Meals away from home and ready-to-eat foods accounted for 23 percent of all food expenditure.

Advantages/Challenges for U.S. Consumer Food Exports to New Zealand

Advantage	Challenge
Familiar business environment for U.S. exporters, including language, communication and customs	Weak New Zealand dollar against U.S. dollar increases import costs for U.S. products
Minimum barriers to trade including low tariffs	Strict phytosanitary/sanitary regulations with regard to fresh produce and meats.
U.S. products hold an image of 'new' and 'high quality'	Consumer foods imported from Australia and Canada are entered free, while U.S. exports pay 0-7% tariffs.
U.S. fresh fruit supplies market demand during New Zealand's off-season.	The Treaty of Closer Economic Cooperation with Australia eliminates tariffs on Australian products resulting in high import of Australian goods.

SECTION II: EXPORTER BUSINESS TIPS

- Business practices are very similar to those in the United States. It is regarded as a common and courteous practice to make and keep appointments in a timely manner. Corporate officials at the most senior level are usually reachable and available for business consultations.
- New Zealand is a sophisticated market interested in new-to-market food products.
- New Zealand importers like to deal directly with U.S. manufacturers rather than brokers.
- Local agents/distributors can be useful in facilitating and promoting exports of some U.S. consumer-ready foods to New Zealand.
- New Zealand is a health conscious market. Fat-free or other health-oriented consumer foods have good sales potential.
- Increase in immigration, travel and education have created opportunities for ethnic foods– Asian, Mexican, Turkish and Indian.
- Many New Zealand importers visit the United States at least once a year to see what is available and to place orders.
- Every year, several New Zealand importers attend the Food Marketing Institute's (FMI) Supermarket Show in Chicago, Fancy Food Show, the Produce Marketing Association (PMA) Show and other popular international shows like ANUGA and SIAL.

New Zealand Food Laws

- The Food and Agriculture Import Regulations and Standards (FAIRS) report for New Zealand contains detailed information on New Zealand's food standards, labeling requirements, import regulations, etc. This report bearing report number *NZ4012* can be viewed/downloaded at the following Internet site: http://www.fas.usda.gov/scriptsw/attacherep/default.htm
- The Food Standards Code is developed and updated by Food Standards Australia New Zealand Food (FSANZ) The Code was recently completely reviewed and consolidated into a joint code that applies to both New Zealand and Australia. The new Code came into final effect in December 2002 (it was in a transitional phase for the prior two years). More information is available on the FSANZ web site at the following address: http://www.foodstandards.gov.au/.
- $ In December 2001, mandatory labeling requirements for genetically modified foods, where introduced DNA or protein is present in the final food, came into effect in New Zealand. The requirements are covered in Standard 1.5.2 of the joint Australia New

Zealand Food Standards Code and FSANZ has developed a User Guide to help interpret the requirements. This information is available on the Internet by clicking on the above links or at the FSANZ web site listed above.

- On September 2004, the Commerce Commission of New Zealand issued a Proposed Draft Guidelines for the Labeling of Genetically Modified Foods and Food Products. The new draft reaffirms the Commission's longstanding policy that any food product claiming to be 'GM-Free' will breach the Fair Trading Act if it contains any trace of genetically modified products, or if any of its components have been made by a process involved genetic modification. For more details please check www.comcom.govt.nz
- New Zealand is currently developing its policy related to MRLs of imported food products, utilizing the methodology established by the Codex Alimentarius Commission. Currently, imported food products sold in New Zealand are tested against the MRLs specified for that food in the current editions or supplements of the Codex publications titled "Pesticide Residues in Food" or "Residues of Veterinary Drugs in Foods". If the imported food product/residue combination is not listed or does not meet these standards, it is measured against New Zealand's domestic MRL standard (New Zealand (Maximum Residue Limits of Agricultural Compounds) Food Standards 2002). New Zealand's domestic standard includes a provision for residues of up to 0.1 mg/kg as a default standard for food product/residue combinations that it does not list. For more information please visit New Zealand report number NZ4010 at http://www.fas.usda.gov/scriptsw/attacherep/default.htm
- Food sold in New Zealand must be labeled in accordance with the Food Standards Code. Labels must include the following information:
    - The name of the food
    - Lot identification
    - Name and address
    - Mandatory warning statements, advisory statements and declarations for certain ingredients/substances
    - Mandatory declaration of certain ingredients/substances
    - Ingredient list
    - Food additives
    - Date marking: Most packaged foods with a shelf life of less than two years must have one of the following date marks
    - `Use By' dates, which relate to food safety
    - `Best Before' dates, which relate to quality
    - Directions for use and storage
    - Nutrition Information Panel

Domestic Trade Shows

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

1. *Foodstuffs Food Show*

This food show is a trade only show and exclusively targets Foodstuffs Limited supermarket store owners/buyers and distributors from Upper North Island and from the South Island. Foodstuffs Limited operates more than 150 supermarkets throughout New Zealand and controls about 55 percent of New Zealand=s retail, supermarket food trade. This show alternates between retail foods and fresh-produce (including seafood, deli, butchery, fresh produce and bakery). It takes place every August in Palmerston North. Their contact details are:

Foodstuff Food Show
Silverstream
Wellington
Atn: David Black
Tel: 64-4-527-2607

2. *Hospitality Food and Wine Show*:

Around 8,000 visitors attend this show. This show attracts hospitality industry contacts and some local food importers/buyers. It takes place every September in Auckland. Contact details are as follows:

The XPO Group Ltd
PO Box 9682 New Market
Auckland, New Zealand
Tel: 64-9-300-3950
Fax: 64-9-379-3358
Internet Homepage: http://www.katrinagordon.co.nz

3. *Katrina Gordon Show*

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, they can be contacted at:

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

SECTION III: MARKET SECTOR STRUCTURE AND TRENDS

A. Retail Food Sector

New Zealand's food retail sector accounts for NZ$9.5 billion (US$5.5 billion). In 2002, consolidation in New Zealand grocery industry took place when Progressive Enterprises Ltd purchased Woolworths (NZ) Limited. It raised Progressive's share of New Zealand's supermarket trade from 25 percent to 45 percent. The revamped industry is now effectively a duopoly of Progressive Enterprises and Foodstuffs (NZ) Limited.

Foodstuffs controls 56 percent of the country's supermarket trade. Its combined wholesale turnover for the three Foodstuffs (Wellington, South Island and Auckland) rose 5.2 percent than 2003, totaling NZ$60.05 billion (US$38.7 billion).

New Zealand retail market distribution

Supermarket	Owned By	Market Share	Brands of Supermarket
Foodstuffs (NZ) Ltd	New Zealand owned; made up of three independently owned co-operatives	56%	▪ New World ▪ Pak N Save ▪ Write Price ▪ Four Square
Progressive Enterprises	Australian Owned. Parent company is called Foodland Associated	44%	▪ Woolworth ▪ Foodtown, ▪ Countdown ▪ Big Fresh ▪ 3 Guys

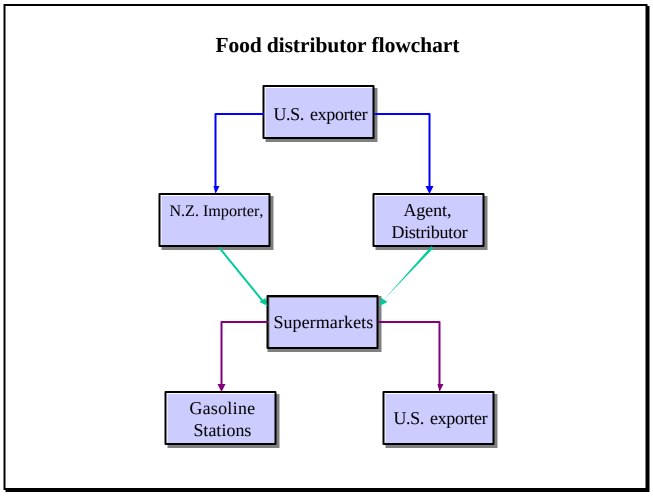
Close to 70 percent of all retail product food sales in New Zealand are made through supermarkets. The balance of the retail food trade consists largely of corner stores called dairies and gas station convenience stores.

Interesting facts about New Zealand food shoppers

- New Zealand shoppers spend about NZ$9.5 billion (US$6.3 billion) in 2003 in New Zealand's 361 supermarkets (includes all retail products sold through supermarkets, i.e. food products, cleaning products, gardening etc.). This represented an annual growth of 7.3 percent.
- Average household weekly expenditure total NZ$758 (US$505). This included approximately NZ$125 (US$83) per week on food, and NZ$29 (US$19) was spent on meals away from home.
- The average New Zealand consumer does around 79 grocery shopping visits per year and spends around NZ$57 (US$38) per visit.
- Approximately 42 percent of New Zealanders shop at a supermarket at least once a week.
- More than 50 percent of New Zealand consumers like to read the label of a product to check its contents
- Approximately two-thirds of all New Zealand shoppers agree that supermarket house-brands offered a quality equal to other brands.

U.S. exporters can appoint agents, distributors or import brokers who can target food category/merchandise managers at major wholesalers and supermarkets chains.

Approximately 90 percent of all imported food products are purchased by and distributed within New Zealand by importers/agents/distributors.



A. **Retail industry information**

The Foodsuffs (NZ) Limited is one of the largest grocery distributors, representing 172 stores in New Zealand. The marketings organization of Foodstuffs Limited consists of three regionally based, retailer-owned co-operative companies, along with their parent company Foodstuffs (NZ) Ltd. The three co-operatives 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. U.S. exporters should contact each of the regional Foodstuffs offices since they make buying decisions independently of each other.

Foodstuffs (Wellington) Co-operative Society Limited PO Box 38-896 Kiln Street, Silverstream Wellington, New Zealand Atn: Eve Kelly, Purchase Manager Tel: +64-4-527-2510 Email: eve.kelly@foodstuffs-wgtn.co.nz	***Foodstuffs (Auckland) Co-operative Society Limited*** PO Box CX12021 Auckland, New Zealand Atn: Mr. Tony Olson, Purchase Manager Tel: +64-4-621-0641 Email: tolson@foodstuffs.co.nz
Foodstuffs (South Island) Co-operative Society Limited 167, Main North Road, Papanui Christchurch, New Zealand Atn: Graham May, Purchase Manager Tel: +64-3-353-8648 Email: gmay@foodstuffs-si.co.nz	

Progressive Enterprise Limited is 100 percent owned by Foodland Associated Limited, one of Australia's largest publicly listed companies. Foodland operates retail outlets in both Australia and New Zealand. It holds 45 percent of the New Zealand's grocery market and controls 179 stores in New Zealand under the supermarket banner group of Foodtown, Woolworths, Coutdown, Big Fresh, Price Chooper and 3Guys. Progressive Enterprise Limited have a total 149 stores countrywide.

All import-purchasing decisions are made at its headquarters in Auckland. Exporters may contact the following office regarding export sales enquiries:

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

New developments taking place in New Zealand retail industry are:

a. Law changes made on September 11, 2003, allow supermarkets to run pharmacies in their premises. Australia's Foodland (owns Progressive Enterprises) is planning to set-up in-store pharmacy in Auckland in 12 months period.

b. It is reported that Costco Wholesale Corporation has been bidding for sites in Sydney and Melbourne, Australia to open Costco stores. It is speculated that Costco will open its stores in Australia in 2005 and enter New Zealand market in 2007.

A. **Industry/Product Trends**

Retail food sales are affected by New Zealand's changing lifestyle. Emerging trends include:

- New Zealand consumers are open to 'new' or 'unique' U.S. food products. Consumer ready foods continue to dominate the import market.
- The traditional 'starting from scratch meals' is in decline. In 2001, 50 percent of those cooking the evening meal used pre-prepared ingredients in comparison to 45 percent in 1999. Products like heat & eat, frozen foods and ethnic carry-out food consumption is on the rise.
- The multi-cultural population will mean an increase in consumption of ethnic foods at home. Supermarkets are responding by devoting increased shelf space and expanding the range of ethnic products with fresh, frozen and ready-to-eat meals.
- The average New Zealand household spends NZ$125 (US$59.00) per week on food. Close to 80 percent of this figure is spent on meals cooked at home. Consumption of red meat and dairy products is on the decline while consumption of vegetable, fresh fruit and fish is increasing.
- Supermarket sales of ready-to-eat meals was the biggest supermarket seller in 2003 at NZ$1,077 million (US$718 million), a 14.4 percent share of total grocery sales. Shelf stable Cookies at NZ$860.30 million (US$573 million), accounting at 11.5 percent of grocery sales.
- Gasoline Stations' sale of food-to-go market has grown 150 per cent (US$7 million) since 1997.
- The trend towards meat-free meals is growing, with one in two New Zealand consumers eating at least one meat-free meal per week.

- Due to busy lifestyles and demanding workplaces, the trend to eat out or use ready-to-eat and heat & eat meals is on the rise. Microwave ovens are present in 70 percent of New Zealand homes. There are opportunities for U.S. exporters of prepared or microwave-ready meals, frozen and pack-to-plate foods and snacks. Strong competition exists, however, from Australian and New Zealand products.
- 23 percent of New Zealand food expenditure is spent on food away from home, compared to 45 percent in the United States, 40 percent in Canada and 27 percent in the United Kingdom.
- Tariffs on imported goods already are generally lower (no more than 7 percent) and are scheduled to be lowered further over the next few years.
- Strict sanitary and phytosanitary standards need to be met for exporting fresh produce, meat, and poultry products.
- New Zealand has strict food standards and labeling requirements, which are set out in the joint Food Standards Australia New Zealand (FSANZ). For more information see www.foodstandards.govt.nz

In terms of what people are buying, the emphasis is on value, convenience and variety. There has been an increase in the purchase of semi-prepared and prepared meals for home consumption, and restaurants are showing dramatic growth.

B. Private Label Trend

New Zealand consumers spent NZ$1 billion (US$720 million) on scanned supermarket private label brands in 2003, almost 20 percent above a year earlier. Private label food products are growing at 15 percent or twice as fast as conventional branded products and they account for 12 percent of all supermarket sales. New Zealand retailers have followed the successful UK model of offering two tiers of private label – one for budget products and another for the higher quality mainstream products. Private Label sales are particular important for chilled foods, shelf stable products and bakery foods. Fresh milk and fresh cream represented 47 percent share of the dollar sales in total supermarkets.

A study conducted by ACNielsen shows that New Zealand shoppers aged 35 years or older have a very positive attitude towards buying private label. But even more significant is the fact that private labels appeal to all income groups, making their target market very wide.

2002 - Highest selling Private Label categories sold in New Zealand supermarkets

Rank	Category
1	Fresh milk and cream
2	Bread
3	Eggs
4	Cheese
5	Butter & Margarine
6	Pre-packaged small goods
7	Carbonated drinks
8	Breakfast Cereals
9	Cookies

Domestic Industry Trends

New Zealand food processing companies continue to move their operations offshore. This has led to an increasing reliance on food imports. This is particularly true for dry or packaged foods. Australia remains the dominant foreign supplier to the New Zealand food industry, with a 52 percent market share in 2001.

Modern, large-scale supermarkets are the leading retail distribution channel in New Zealand. Grocery outlets concentrate on appealing products supported by high profile brand advertising and instore-promotion. The number of women in the workforce continues to grow which is encouraging less frequent and one-stop supermarket shopping. As the country is becoming an on-line society, food retailing over the internet has increased considerably and Woolworth (now under the Progressive Enterprise umbrella) is pioneering on-line food retailing.

Trends in Promotion/Marketing Strategies

A survey completed by AC Nielsen, a retail measurement service, studied which promotion strategies made a difference in consumer purchasing. The survey concluded:

- that price reductions encouraged 90 percent of consumers to buy;
- extra quantities for the same price encouraged 58 percent of consumers to buy;
- multi pack discounts encouraged 55 percent of consumers to buy;
- other promotions, including off-shelf discounts, store cards, discounts, free tasting and competitions, ranged between 30-100 percent effectiveness in the survey.
- The above indicates that the average New Zealand consumer is very price conscious.

Other popular marketing and promotion strategies used in New Zealand are:

- Linking food/beverage products with sports and famous teams.
- Linking products with famous movies or stars;
- Food trade shows are also a popular promotional tool for N.Z. food manufacturers.

Media influence on New Zealand shoppers are:

- **Television -** More than 95 percent of the New Zealand population has a TV set and nearly 60 percent of households have multiple sets. The average daily time spent viewing television increased by 30 minutes in 2002 to under 3 hours a day in 2003.
- **Readership –** In 2002, both magazines and newspapers grew in circulation readership. An important trend for newspapers in 2002 was the increase in their female readers, up by 52,000.
- **Internet –** Around 75 percent of New Zealanders aged 10 and over have access to the Internet from a location, and a 50 percent have an access to the internet from home. Around 1.6 million New Zealander are regular internet users and 800,000 New Zealanders log on to the internet everyday.
- **Advertising –** In 2002, NZ$1.9 billion was spent on advertising in New Zealand, up 8.9 percent on 2001. The majority of this was spent on television (68%). 'Food items' is the largest advertising category with 16 percent of all advertising money spent on food related topics. Supermarkets are the major players in this category, spending over NZ$62 million in 2002 on a combination of television, newspapers, magazines and radio, excluding direct mailing to households.

Fishery Products

Demand for canned fishery products is declining as consumers are shifting to fresh or vacuum packed (especially local salmon) or frozen sea foods. The U.S. supplies part of New Zealand's canned salmon imports but the strong U.S. dollar relative to the major competitor Canada, has reduced U.S. sales over the past years. New Zealand is exporting more seafood products, aided by its weak dollar, so potential exists for niche U.S. fishery products if prices are competitive.

HRI / Foodservice Sector

A café and restaurant culture of international reputation is firmly established throughout New Zealand. Similarly, fast food operators offering burgers to kebabs are now part of the eating-out scene. Industry sales for this sector include cafes and restaurants, pubs, taverns and bars, and takeaway food retailing.

Total sector sales for the year ending March 2003 totaled NZ$3.4 billion (US$2.3 billion), up 9 percent over a year earlier. Annual sales in 2004 are projected to grow to an estimated sales of NZ$3.7 million. Growth in the foodservice industry by segment is as follows:

Foodservice Industry	Annual Sales 2003 (NZ$ million)	% Growth 2002-2003
Restaurants & Cafes, Coffee Houses & Caterers	2,769	9
Fish & Chips, Ethnic Food, Hamburger and Chicken Takeaways	431	7
Lunch Bars, Ice-Cream Parlors and Vendors and other Takeaways	196	19
Pizza Takeaways	70	3
Total	**3,466**	**9**

The total number of outlets in the foodservice industry in 2003 was 9,063, up 9 percent over 2002. This includes 5,367 restaurants and coffee houses; 1,943 Ethnic food and Fish & Chips takeaway shops; 1,148 Lunch bars, Ice-Cream Parlors; and 180 Pizza takeaways.

An average household spend NZ$125 (US$83) weekly on food shopping, and approximately NZ$29 (US$19) was spent on meals away from home.

C. Food Processing Sector

Overview
The food processing sector in New Zealand is dominated by dairy and meat (primarily beef and sheepmeat) processing. Both of these sub-sectors are heavily dependent on export earnings and are strongly linked to upstream agricultural activities and farming.

Food processing in New Zealand is significant and diverse, especially when viewed in relation to New Zealand's relatively small population. It includes wine, beer, bakery products, fruits and vegetables, and snack foods.

The top five mega brands in New Zealand supermarkets are all traditional New Zealand brands, these include Heinz Watties (canned and processed foods), Anchor (Dairy Products), Griffins (biscuits/snack foods), Quality Bakers (bakery products) and Cadbury (chocolate).
A major challenge to expanding U.S. consumer-oriented food exports to New Zealand is the significant output of products produced in Australia from multinational food companies (which are imported duty free into New Zealand. This includes many familiar U.S. brands: Kellogg's, Campbell's, Mars, Ocean Spray (using imported U.S. cranberries), Old El Paso and Neuman's. Other companies process products within the region such as Nabisco, which has cookie operations in Indonesia.

Section IV: Best High-value Product Prospects

- Fresh fruit, especially grapes, stone fruit (nectarines, peaches and plums), citrus and pears during New Zealand's off-season period;
- Snack foods including nuts (almonds, pistachios, walnuts) and dried fruit (raisins, mixed fruit, dates, figs);
- Microwave meals, frozen foods, meal replacement drinks, soups, pasta, sauces, dressings and canned foods;
- Fruit juices and flavored drinks.
- Health foods such as high energy bars and drinks;
- Organic foods, including cereals and snack products;
- Niche market food preparations, especially new products or those offering special nutrition, convenience, taste preferences;
- Pet food, especially high quality or high nutrition;
- Canned Salmon

(Note: Many U.S. processed food products are sold is bulk volume to New Zealand importers and are in turn used for further processing and/or re-packaged in New Zealand before being sold at the retail level)

Section V: Key Contacts and Further Information

United States Embassy / Wellington
Foreign Agricultural Service
Address: PSC 467, Box 1, FPO AP, 96531-1034
Phone: (64) (4) 462-6030
Fax: (64) (4) 472-6016
e-mail: agwellington@usda.gov
Internet homepage: http://www.usembassy.org.nz

List of Useful Government Agencies and Trade Associations

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

Food Standards Australia New Zealand (FSANZ)
PO Box 10559
Wellington 6036
New Zealand
Tel: 64-4-473-9942
Fax: 64-4-473-9855
Email: nz.reception@foodstandards.gov.au
Internet Homepage: http://www.foodstandards.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

Ministry of Health
PO Box 5013
Wellington
Tel: 64-4-496-2360
Fax: 64-4-496-2340
Internet Homepage: http://www.moh.govt.nz

New Zealand Grocery Marketers' Association
Enterprise House P.O. Box 11-543
Wellington, New Zealand
Phone: (64) (4) 473-3000
Fax: (64) (4) 473-3004

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/market share (US$)	$1,429 million	11%
Consumer Food Imports from All Countries/Market Share (US$)	$971	10%
Edible Fishery Imports from All Countries (US$)	$51	3%
Total Population (Millions)/Annual Growth Rate	4 million	1.5%
Urban Population (Millions)	3.2	-
Number of Major Metropolitan Areas[1]	1	-
Size of the Middle Class (Thousands)[2]	-	54.5%
Per Capita Gross Domestic Product (US$)	$18,174	-
Unemployment Rate (%)	-	4%
Per Capita Food Expenditure (US$)	$30.30	-
Exchange Rate		US$1 = NZ$1.55

1/ Under the definition 'in excess of 1 million' there is only one city Auckland 1,216,900). New Zealand has 4 major metropolitan areas: Wellington with a population of (450,000), Christchurch (334,104) and Hamilton (166,128)

2/ New Zealand middle class: annual income ranging from NZ$15,000 to NZ$50,000

Table C- New Zealand Imports
Consumer-Oriented Food Products

New Zealand Top 15 Ranking	Import		
	2001	2002	2003
	1000$	1000$	1000$
Australia	487,532	450,107	503,212
United States	113,383	74,727	99,405
Swaziland	0	17,288	27,780
Philippines	8,303	10,142	26,373
China (Peoples Republic)	13,609	15,133	23,012
Italy	20,995	17,508	21,394
Canada	31,994	18,219	20,456
Ecuador	26,269	32,039	20196
Thailand	17,866	17,743	18,081
France	16,513	14,589	17,983
Netherlands	15,111	11,888	17,051
Fiji	11,094	11,000	13,445
United Kingdom	13,222	11,632	11,810
Germany	10,354	8,515	10,002
Free Zones	0	12,501	9,141
Other	148,751	110,982	131,616
World	**935,026**	833,811	971,037

New Zealand Imports
Fish & Seafood Products

New Zealand: Top 15 Ranking	*Import*		
	2001	*2002*	*2003*
	1000$	*1000$*	*1000$*
Thailand	22,403	19,905	21,480
Canada	7,618	5,410	5,546
China (Peoples Republic of)	7,137	6,807	5,371
Australia	4,235	4,347	3,674
Chile	973	998	2,071
Japan	1,746	2,049	1,884
Korea, Republic of	1,860	1,811	1,565
United States	891	1,047	1,335
Malaysia	563	514	900
Fiji	610	491	822
India	1,286	1,013	674
Indonesia	1,373	1,268	586
Singapore	838	663	545
Argentina	66	209	537
Taiwan (Estimated)	533	403	407
Other	6,469	4,065	3,179
World	58,600	51,006	50,575

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***		
	2001	**2002**	**2003**	**2001**	**2002**	**2003**	**2001**	**2002**	**2003**
CONSUMER ORIENTED FOODS	935	834	971	113	75	99	12%	9%	10%
Snack Foods (Excl Nuts)	113	96	117	06	03	04	06%	03%	03%
Breakfast Cereals & Pancake Mix	17	18	23	01	01	01	02%	0%	0%
Red Meats, Fresh/Chilled/Frozen	64	61	59	01	04	03	02%	06%	06%
Red Meats, Prepared/preserved	20	16	19	03	03	03	13%	18%	18%
Dairy Products (Excl. Cheese)	26	22	26	01	01	01	0.99%	0.5%	0.7%
Cheese	06	07	08	01	0	01	0.22%	0%	0%
Eggs & Products	02	02	01	01	01	01	06%	06%	05%
Fresh Fruit	65	71	90	16	11	22	24%	16%	24%
Fresh Vegetables	17	12	15	01	01	01	02%	03%	04%
Processed Fruits and Vegetables	115	96	115	17	11	12	15%	11%	11%
Fruit & Vegetable Juices	26	22	26	02	02	02	09%	09%	09%
Tree Nuts	14	12	13	03	03	03	25%	27%	24%
Wine & Beer	109	87	110	01	01	01	0.46%	0%	0.7%
Nursery Products & Cut Flowers	07	05	06	01	01	01	08%	08%	09%
Pet Foods (Dog & Cat Food)	36	35	45	13	10	13	35%	28%	29%
Other Consumer-oriented products	298	271	299	50	27	34	17%	10%	11%
Fish & Seafood Products	59	51	51	01	01	01	02%	02%	03%
Salmon	07	06	06	01	01	01	10%	13%	22%
Surimi	04	04	04	0	01	0	0%	0%	0%
Crustaceans	14	13	14	01	0	01	0%	0.6%	0%
Ground & Flatfish	08	05	02	0	01	01	0%	0.11%	0.5%
Molluses	06	06	07	01	01	01	3%	3%	0.3%
Other Fishery Products	20	17	18	01	01	01	0%	0%	0%
AGRICULTURAL PRODUCTS TOTAL	**1,454**	**1,276**	**1,429**	**175**	**121**	**151**	**12%**	**09%**	**11%**
AGRICULTURAL, FISH & FORESTRY TOTAL	**1,576**	**1,395**	**1,563**	**181**	**127**	**157**	**11%**	**09%**	**10%**