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New Zealand

Exporter Guide

Annual

2003

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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. High-value food imports in 2001 increased nearly 30 percent to US$0.9 billion. The U.S. enjoys a 12 percent share of New Zealand's imports of processed foods.

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 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 (1.12 million), Wellington (347,000), and Christchurch (344,000). New Zealand population is diverse and multi-cultural. Approximately 75 percent of New Zealanders are of European origin, with around 8 percent Maori, 9 percent Polynesian and 4 percent Asian. 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. Agricultural exports from the United States to New Zealand in calendar 2001 totaled $181 million, of which two-thirds consisted 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 12 percent market share of New Zealand's imported consumer oriented foods and beverages. The U.S. share has declined slightly since 1999, 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 2001/02. Real Gross Domestic product (GDP), which is an acceptable indication of market activity, increased 4 percent in the year ending June 2003.
- The current account deficit is expected to increase to about 5 percent of GDP in 2003. The unemployment rate dropped to 4.7 percent of the labor force.
- Per capita income is estimated at about US$15,190. The exchange rate as of the end of September 2003 was NZ$1=US$0.58 .
- An Average household spends $445 per week and almost 13 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.
- The Food Standards Code is developed and updated by Food Standards Australia New Zealand Food (FSANZ) - formerly ANZFA. 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/.
- 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 NZ3016 can be viewed/downloaded at the following Internet site: http://www.fas.usda.gov/scriptsw/attacherep/default.htm

$ 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.

- $ Imported food sold in New Zealand must comply with the New Zealand (Maximum Residue Limits of Agricultural Compounds) Food Standards 2002. Foods containing residues of an agricultural compound not authorized by these standards are prohibited from sale in New Zealand. Most registered pesticides can be found on the NZFSA's Agricultural Compounds and Veterinary Medicines Group http://www.nzfsa.govt.nz/policy-law/legislation/food-standards/nz-food-standards-2002-mrl.pdf. New Zealand Maximum Residue Limits are constantly changing, therefore, US exporters are advised to get guidance on the latest available information from the above website.

Domestic Trade Shows

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

Hospitality Food and Wine Show:
Around 8,000 visitors attend this show. It is mainly attended by people from the hospitality industry 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

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 June 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.

Despite the recent enlargement of the Progressive chain, Foodstuffs (NZ) Limited remains New Zealand's largest supermarket group. Foodstuffs still controls 55 percent of the country's supermarket trade with an annual turnover of NZ$5.36 billion (US$3 billion).

New Zealand retail market distribution

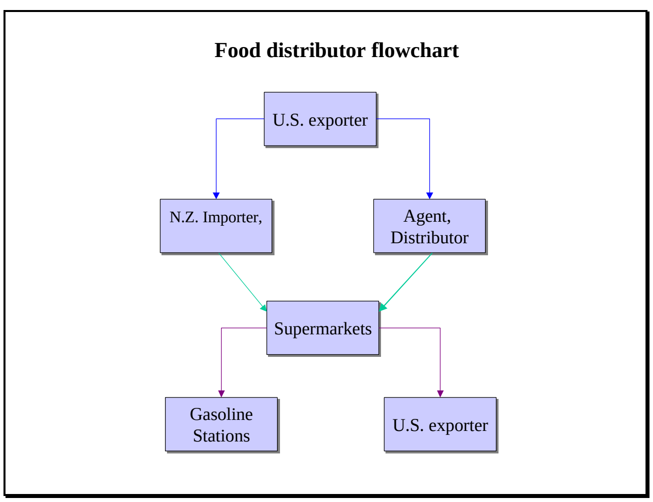
Supermarket	Owned By	Market Share	Brands of Supermarket
Foodstuffs (NZ) Ltd	New Zealand owned; made up of three independently owned co-operatives	55%	▪ New World ▪ Pak N Save ▪ Write Price ▪ Four Square
Progressive Enterprises	Australian Owned. Parent company is called Foodland Associated	45%	▪ Woolworth ▪ 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 $5.6 billion annually in New Zealand Grocery Supermarkets.
- The retail sales value of scanned grocery (barcode items) in 2002 is estimated at US$ 4.5 billion and is growing at more than 7 percent annually
- The average New Zealand family spends about US$70 per week.
- Approximately 70 percent of all grocery shopping is made through modern supermarkets.

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 167 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 179 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: Grahm Walker, Business Manager
> Tel +64-9-275-2621
> email: graham.walker@progressive.co.nz

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 has doubled over the past 4 years to US$31 million.
- Gasoline Stations' sales of food-to-go market has grown 150 per cent (US$7 million) since 1997.
- Key product range showing significant growth in the supermarkets is: chilled food (10.9%) driven by pre-prepared dips & vacuum-packed seafood; frozen food (9.1%) driven by frozen meals and frozen fruit.
- 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

B. Private Label Trend in 2002

New Zealand consumers spent NZ$790 million (US$465 million) on scanned supermarket private label brands in 2002 accounted for approximately 11 percent of total grocery sales. Private labels food products are growing at 15% or twice as fast as conventional branded products.

A study conducted by ACNielsen shows that 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.

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 consumers 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.

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

As recently as generation ago, most people dined out at hotel/restaurants. But a café culture and restaurants of international reputation are now firmly established throughout the country. Similarly, fast food operators offering burgers to kebabs are now part of the eating-out scene. Industry sales for this sector represents cafes and restaurants, pubs, taverns and bars, and takeaway food retailing.

The total sector sales for the year ending March 2002 totaled NZ$3.4 billion (US$1.59 billion), up 7 percent over a year earlier. Growth in the foodservice industry by segment is as follows:

Foodservice Industry	Annual Sales 2002 (NZ$ million)	% Growth 2001-2002
Coffee House & Unlicenced Restaurants & Cafes	1280	10
Licenced & BYO Restaurants & Cafes	924	7
Fish & Chips, Chinese, Hamburger, Pizza & Chicken	526	4
Caterers	412	15
Lunch Bars, Ice Cream Parlors & vendors	173	2
Night Club	170	15
Total	3485	9

The total number of outlets in the foodservice industry in 2002 is estimated at 8,610, up 9 percent over 2001. This includes 2,300 fast food outlets, which are growing at more than 3 percent annually.

New Zealanders spend almost one out of every four food dollars on meals away from home. By 2010 this is expected to reach one out of every three.

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), Griffins (biscuits/snack foods), Quality Bakers (bakery products), Anchor (dairy products), and Bluebird (snack foods).

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. Carbonated drinks and fruit juice account for 30 percent and 16 percent respectively, of the New Zealand beverage market.
- 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@fas.usda.gov
Internet homepage: http://www.usembassy.org.nz

List of Useful Government Agencies and Trade Associations

New Zealand Food Safety Authority (NZFSA)
New Zealand Food Safety Authority
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		Million	US Market Share (%)
Agricultural Imports from All Countries	(US$)	$1,454	12%
Consumer Food Imports from All Countries	(US$)	$935	12%
Edible Fishery Imports from All Countries	(US$)	$59	2%
Total Population (Millions)/Annual Growth Rate		3.9	1.5%
Urban Population (Millions)		3.2	-
Number of Major Metropolitan Areas[1]		1	-
Size of the Middle Class (Thousands)[2]		-	54.5%
Per Capita Gross Domestic Product (US$)		$17,700	-
Unemployment Rate (%)		-	5.3%
Per Capita Food Expenditure (US$)		$1105	-
Exchange Rate (US$1=xx NZ$)		2.1	-

1/ Under the definition 'in excess of 1 million' there is only one (Auckland 1,216,900). New Zealand has 4 major metropolitan areas: Wellington (339,747), Christchurch (334,104) and Hamilton (166,128) and Auckland.
2/ New Zealand middle class: annual income ranging from NZ$15,000 to NZ$50,000

New Zealand Imports
Consumer-Oriented Food Products I

New Zealand Top 15 Ranking	**Import**		
	1999	**2000**	**2001**
	1000$	**1000$**	**1000$**
Australia	37,665 4	37,2699	487,532
United States	92,440	90,760	113,383
Canada	19,979	23,277	31,994
Ecuador	29,031	26,097	26,269
Italy	12,540	13,544	20,995
Thailand	15,823	15,353	17,866
France	17,660	11,922	46,513
Netherlands	13,632	12,147	15,111
China (Peoples Republic of)	9,772	9,905	13,609
United Kingdom	10,960	10,557	13,222
Fiji	8,126	7,101	11,094
Brazil	7,561	7,679	10,493
Spec Cats	6,949	7,466	10,392
Germany	7,286	8,079	10,354
Japan	7,793	10,240	8,679
Other	95,775	98,996	127,490
World	**732,0 09**	**725,84 6**	**935,02 6**

New Zealand Imports
Fish & Seafood Products

New Zealand: Top 15 Ranking	***Import***		
	1999	***2000***	***2001***
	1000$	***1000$***	***1000$***
Thailand	*17496*	*17863*	*22403*
Canada	*6797*	*6974*	*7618*
China (Peoples Republic of)	*1756*	*1558*	*7137*
Australia	*5042*	*4308*	*4235*
Korea, Republic of	*1080*	*1180*	*1860*
Japan	*1784*	*2140*	*1746*
Spec Cats	*623*	*746*	*1562*
Indonesia	*126*	*312*	*1373*
India	*990*	*1153*	*1286*
United Arab Emirates	*443*	*771*	*1120*
Chile	*1054*	*979*	*973*
United States	*1840*	*1334*	*891*
Singapore	*177*	*310*	*838*
Vietnam	*405*	*372*	*616*
Fiji	*142*	*206*	*610*
Other	*4698*	*7973*	*4333*
World	*44,463*	***48,190***	***58600***

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*		
	1999	***2000***	***2001***	***1999***	***2000***	***2001***	***1999***	***2000***	***2001***
CONSUMER ORIENTED FOODS	732	*726*	*935*	92	*91*	*113*	13%	*13%*	*12%*
Snack Foods (Excl Nuts)	64	78	113	6	6	6	7%	7%	6%
Breakfast Cereals & Pancakes Mix	18	13	17	1	1	1	1%	2%	2%
Red Meats, Fresh/Chilled/Frozen	31	44	64	1	1	1	2%	1%	2%
Red Meats, Prepared/Preserved	14	16	20	1	1	3	10%	6%	13%
Poultry Meat	1	0	0	0	0	0	0%	0%	0%
Dairy Products (Excl Cheese)	16	21	26	1	1	1	1%	0%	.99%
Cheese	7	7	6	1	1	1	0%	0%	.22%
Eggs & Products	1	1	2	1	1	1	36%	19%	6%
Fresh Fruit	67	62	65	15	13	16	22%	21%	24%
Fresh Vegetables	12	11	17	1	1	1	3%	3%	2%
Processing Fruit & Vegetables	94	90	115	12	12	17	13%	14%	15%
Fruit & Vegetable Juices	20	17	26	3	2	2	14%	12%	9%
Tree Nuts	12	12	14	3	3	3	22%	23%	25%
Wine & Beer	82	76	109	1	1	1	1%	1%	.46%
Nursery Products & Cut Flowers	5	5	7	1	1	1	7%	8%	8%
Pet Foods (Dog & Cat Food)	33	29	36	10	10	13	31%	33%	35%
Other Consumer-Oriented Products	237	244	298	40	42	50	17%	17%	17%
FISH & SEAFOOD PRODUCTS	44	48	59	2	1	1	4%	3%	2%
Salmon	7	7	7	1	1	1	17%	16%	10%
Surimi	2	2	4	1	0	0	0%	0%	0%
Crustaceans	14	13	14	1	1	1	0%	0%	.02%
Groundfish & Flatfish	2	5	8	1	0	0	2%	0%	0%
Molluscs	5	5	6	1	1	1	7%	3%	3%
Other Fisher Products	15	15	20	1	1	1	2%	0%	.02%
AGRICULTURAL PRODUCTS TOTAL	1,111	1,103	1,454	139	132	175	13%	12%	12%
AGRICULTURAL, FISH & FORESTRY TOTAL	1,221	1,225	1,576	147	139	181	12%	11%	11%