

TĀNGATA HUAWHENUA

MĀORI HORTICULTURE COUNCIL AOTEAROA

Tangata Huawhenua Māori Hort Council – Pānui Autum 2025

He Mihi Nui e te whānau, ka rere aku mihi ki a koutou katoa. As guardians of our whenua, we carry the privilege and responsibility of growing opportunities for our people and our land. Horticulture is vital to Aotearoa, contributing to economic prosperity and celebrating the resilience, tikanga, and manaakitanga of Māori.

Autum must be the season to release reports and in this panui we highlight four:

- 2025 *Māori in Horticulture* report, prepared by BERL for Horticulture New Zealand;
- *Pathways to a Better Future for the NZ Kiwifruit Industry*, prepared by Professor Frank Scrimgeour;
- *Future Use of Land and How to Fund It* report, authored by Sapere and commissioned by the Ministry for the Environment; and
- *KPMG Agri Agenda 2025*.

Kiwifruit at the Crossroads: A Call to Action for Māori Growers

In April 2025, Professor Frank Scrimgeour released a landmark report: “*Pathways to a Better Future for the NZ Kiwifruit Industry*”. While the report is aimed at the sector broadly, its messages speak directly to Māori growers, landowners, and leaders who are increasingly invested in Aotearoa’s most valuable fruit export.

The Legacy of Growth

Over the past 20 years, the kiwifruit industry has been one of New Zealand’s great success stories. Global revenue grew from \$1 billion to \$4.5 billion, driven by strong branding, research and development, and coordinated industry structure. Māori growers have contributed to and benefited from this growth—but the foundations are beginning to shift.

The Challenges We Can’t Ignore

The report highlights several urgent threats:

- Declining profitability for growers, especially in green fruit
- Falling grower shareholding in Zespri (now below 50%)
- Biophysical risks such as PSA and major weather events
- Escalating overheads and governance tensions within Zespri
- Questions around the performance and legitimacy of the post-harvest sector

These challenges are more than technical—they risk undermining Māori returns, influence, and long-term participation in the value chain.

Four Strategic Pathways Forward

Professor Scrimgeour outlines four key areas of reform that deserve serious attention from Māori growers and industry leaders.

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1. Strengthen Grower Leadership

The report calls for new tools—like a Grower Shareholder Fund (SHF)—to help rebuild grower control in Zespri. Other structural options include class B shares, shareholding caps, and possibly a new cooperative model.

For Māori, this presents a clear question: should we seek greater collective ownership and influence in Zespri, or risk becoming price-takers in a system we no longer shape?

2. Create Transparency in Offshore Growing

Offshore kiwifruit production is now 15% of total volume, yet many growers have no visibility into its operations or impact on brand value and returns.

A formal framework is needed to define standards, transparency, country-of-origin labelling, and governance of offshore partnerships. Māori growers—especially those with international trade aspirations—have much to contribute here.

3. Reform the Plant Variety Rights (PVR) Strategy

From 2019 to 2024, PVRs generated more income than Zespri's profits—yet growers remain in the dark about how that value is distributed.

The report suggests creating a grower trust to manage PVRs more transparently and calls for a renewed focus on grower-friendly, high-demand cultivars. This aligns well with Māori principles of equity, fairness, and intergenerational stewardship.

4. Rebuild the Supply Chain

Despite the industry's success, the supply chain remains largely unchanged since 2000. It is complex, inefficient, and increasingly misaligned with global expectations.

Proposed changes include streamlining handling, shifting quality control to post-harvest operators, and moving Zespri's fruit ownership point closer to the end customer. Māori involvement in post-harvest and logistics can help shape a new model that delivers better returns and resilience.

Other Critical Priorities

The report also calls for urgent progress on:

- Reducing the sector's carbon footprint
- Preparing for climate change and international trade risk
- Clarifying hydrogen cyanamide policy
- Supporting greater Māori and Indian grower representation
- Improving the commercialisation of new cultivars
- Managing Zespri's organisational scope and focus

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Conclusion: A Time to Lead

Professor Scrimgeour's message is direct: reform is essential to maintain grower trust, preserve industry self-governance, and protect the long-term viability of the kiwifruit sector.

For Māori, this is more than a sectoral issue—it is about the future of our whenua, our investments, and our ability to lead.

Let's not wait to be consulted. Let's step forward as architects of the next chapter.

Māori in Horticulture: Growth, Resilience, and Future Pathways

Tāngata Huawhenua acknowledges the release of the 2025 *Māori in Horticulture* report, prepared by BERL for Horticulture New Zealand. The report provides a timely snapshot of Māori growth, participation, and future potential in Aotearoa's booming horticulture industry.

Key Findings at a glance

- 7% of all NZ horticulture land is now Māori-owned – up 50% since 2017.
- 12.2% of all kiwifruit land is in Māori hands.
- \$305 million: Estimated gross output from Māori horticulture in 2024.
- Nearly 4,000 Māori work in the horticulture sector – making up 17% of the workforce.
- Kiwifruit leads the charge, followed by onions, apples, and emerging avocado developments.

Māori Land Use is Shifting – and Fast

Only 1.1% of all Māori land is currently in horticulture, but the area is expanding rapidly, with over 5,700 hectares in production as of 2024. This growth is in contrast to national horticulture land use, which is in slight decline—signalling that Māori are driving new value into the sector.

Kiwifruit: A Strategic Anchor Crop

- Māori growers now control 2,073 hectares of kiwifruit, making it the largest single crop.
- Māori orchards contribute over \$228 million in gross revenue, most of it export-driven.
- There is continued Māori uptake of gold varieties, which have higher returns per hectare.

Onions, Apples, and Avocados

- Māori control 10.5% of New Zealand's onion land, with increasing market share.
- While apples and avocados are smaller by area, they present strong development potential, especially in regions like Northland and Gisborne.

Cyclone Gabrielle and COVID: Resilience Under Pressure

- Cyclone Gabrielle hit Māori growers hard, especially in Hawke's Bay. Tree losses, silt damage, and income shocks were compounded by limited access to capital reserves.

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- The COVID pandemic delayed investment and reduced workforce availability—highlighting the need for future-proofed systems and financial support.

Workforce Insights

- Māori make up nearly 1 in 5 horticultural workers, with 933 employed in kiwifruit alone.
- However, 71% of Māori workers are in low-skilled roles, compared to 49% for non-Māori.
- There's a pressing need for training pathways, automation transitions, and long-term employment plans that lift Māori into higher-value roles.

Funding and Aspirations

- Over 753 hectares of Māori horticulture has been supported by the Provincial Growth Fund (PGF).
- Māori collectives are actively expanding in kiwifruit, avocados, citrus, and nuts.
- Northland, Bay of Plenty, and East Coast remain focus regions for future development.

Our Take: What This Means for the Māori Horticulture Council

- Māori horticulture is moving from the margins to the centre of the sector's future.
- We must now focus on:
 - Securing land and water for horticulture expansion
 - Accessing capital and joint venture models that protect Māori equity
 - Lifting skills and ownership across the value chain
 - Embedding climate and disaster resilience

Future Use of Land and How to Fund It

The recently released *Future Use of Land and How to Fund It* report, authored by Sapere and commissioned by the Ministry for the Environment, outlines the urgent need for land-use transformation across Aotearoa — and explores how capital and capability can support that transition.

Key Insights for Māori Landowners and Growers

We Need to Change How We Use Our Land

- Current land use is unsustainable – especially high-emission pastoral farming.
- Aotearoa needs to reduce emissions and improve freshwater and biodiversity outcomes.

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- Māori landowners are well positioned to lead a regenerative shift to horticulture, forestry, and diversified land use.

Funding the Transition

- Transforming land use requires upfront investment – in infrastructure, skills, and market access.
- Traditional funding models (banks, grants) often fail to reach Māori collectives due to land tenure and governance complexity.
- New capital partnerships and shared-risk models are essential to unlock Māori whenua potential.

Horticulture is a Key Opportunity

- The report highlights horticulture and high-value crops as among the most compelling low-emission land uses.
- However, water access, infrastructure, and upfront development costs remain barriers — especially on Māori land.
- Calls for government and private co-investment in enabling infrastructure (e.g., irrigation, roads, packhouses) are central.

Recommendations

- Create dedicated land-use transition funds, targeted at Māori and collective landowners.
- Develop financial instruments that recognise the long-term, intergenerational horizon of Māori whenua development.
- Invest in capability building, local advisory services, and climate-resilient planning.

Tāngata Huawhenua Commentary

This report reinforces what we already know: the future of Aotearoa's land lies in diversification, resilience, and Māori-led innovation.

For Māori in horticulture, this is a call to action — not just for transformation of our whenua, but for transformation of how we are funded, supported, and enabled to lead that change.

We support efforts to create Māori-specific investment pathways and welcome discussion with funders, government, and partners who understand the unique strength and structure of Māori landowners.

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He Tirohanga Māori | Insights from the 2025 KPMG Agri Agenda Huitanguru 2025

The latest *KPMG Agri Agenda 2025* calls for a reboot of our food and fibre systems to prepare for a more volatile, competitive, and values-driven global marketplace. Under the theme “*Rethink. Rebuild. Reconnect.*” the report urges bold action to build long-term sector resilience.

Key Takeaways for Māori in Horticulture and Agribusiness

System Reset Needed

Current systems are too slow, reactive, and fragmented. We must rethink land use, funding models, innovation systems, and global positioning.

Authentic Global Positioning

Aotearoa must own a clear and truthful food identity — where Māori values, whenua-based narratives, and kaitiakitanga (guardianship) can play a defining role.

This is not just about marketing — it's about embedding cultural integrity into trade, innovation, and governance.

Rebuild Industry Foundations

We must build resilience into supply chains, climate strategies, and capital flows.

Māori growers and landowners need access to fit-for-purpose infrastructure, water security, and scale-enabling partnerships.

Workforce, innovation, and governance capability must also be rebuilt — with Māori at the decision-making table.

Reconnect with Purpose

We must strengthen cross-sector collaboration, especially between government, Māori, and industry bodies.

Reconnecting people to land, food systems, and place — something Māori enterprises have always upheld — is vital.

This also means tackling trust, intergenerational planning, and rebuilding pride in the primary sector.

Tāngata Huawhenua sees this report as a call to action for government, finance, and industry to back Māori landowners and enterprises as leaders in the transformation of Aotearoa's food and fibre future.

Key Updates

Malaysian Collaborative Marketing Programme 2025:

Te Awanui, as proud members of Tangata Huawhenua, has secured a second year in the Malaysian programme. While Gold Kiwifruit wasn't included this season, they remain determined to achieve this in future. This year, 132,050 trays will be delivered to Natures Best in Malaysia, showcasing our commitment to global growth.

Sector Trends:

The government's export initiative aims to reach a record \$8 billion by mid-2025. By embracing sustainable practices and expanding to markets like the UAE and Asia, Māori horticulture is poised to lead the way.

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Horticulture Sector Update – April 2025 Summary

Source: HortNZ

Citrus NZ

- Undergoing a strategic reset with focus on grower engagement, R&D, and market access.
- Citrus Regional Advisory Groups being established in key regions.
- Concerns raised with MPI over import volumes and market reciprocity (Australia, USA, Egypt, Vietnam).
- New levy passed with 85% support; harvest underway with strong fruit quality.

Hawke's Bay Fruitgrowers Association (HBFA)

- Excellent quality and pack outs reported for the 2025 harvest.
- Advocacy ongoing on urban development (FDS), water storage, and not-for-profit tax reforms.
- Hosted a well-attended 2025 Industry Awards Night.
- Submitted concerns over taxing “unrelated” income and FBT compliance burden on regional charities.

Vegetables NZ & Covered Crop Sector

- Launched the Vegetable Industry Centre of Excellence in Pukekohe with 14 active research projects.
- Grower Hub CRM now live with 2,000+ grower records and modules for events, comms, GIS, and levy management.
- Ongoing push for a National Environmental Standard for Commercial Vegetable Production.
- Calls for faster EPA chemical approvals and green energy transition support for covered crops.

New Zealand Apples & Pears (NZAPI)

- 2025 seen as best quality season in years; early markets capitalised.
- Key focus on market access into Japan, Vietnam, Taiwan, and FTA work with India.
- Hosting MPI/EPA delegation for strategic alignment and showcasing packhouse operations.

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Avocados NZ

- Exports surged 190% to 3.71M trays; new class 2 strategy helped relieve local volumes.
- All exporters now enrolled in FernMark programme.
- Focus shifting to North America and Asia with early harvest (June–November) forecast for 2025–26.
- Four key strategic themes include compliance reform, NZ market development, and export growth alignment.

Feijoas NZ

- Exceptional fruit quality and early season reported in Gisborne and Hawke's Bay.
- Large early volumes dampened prices slightly, but demand is steady.
- Small export window to USA remains consistent; hopes for higher domestic returns.

Kiwiberry Growers NZ

- Exported 146,400 trays, up 34,200 from 2024.
- Market access to China restored after a 9-year effort via MPI.
- Future focus turning to R&D investment to support sector growth.

NZKGI – Kiwifruit

- Forecasting record harvest: 204 million trays.
- Red variety drove earliest harvest ever; good labour supply and weather.
- Over 58 million trays picked to date (up from 43M same time last year).

Onions NZ

- Quality and yield strong, but Indonesia quota delays are hurting exports.
- Container shortages also impacting shipping logistics.
- Urgent need for improved market access predictability.

Potatoes NZ

- Driving IPM education, industry youth development, and international connections.
- Launched Potato Business School Scholarship and Youth Council.

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- Concern: low prices and compliance gaps with new entrants creating uneven playing field.

Process Vegetables NZ

- Varied growing season: hot/dry start followed by cool/wet period.
- Good yields overall; pea crops impacted by heat early and disease later.
- Squash in Wairoa hit by rain; backup from HB.
- Baby carrot and bean crops performing well.

Pukekohe Vegetable Growers Association

- Continued oversupply and poor returns driving some growers to exit.
- Positive: strong engagement via the Big Vegetable Day Out and local career expo.
- Ongoing water and soil preparation issues due to dry conditions.

Summerfruit NZ

- Cherry exports hit 5,000t+ for the first time.
- Good yields and domestic quality; price softened post-Christmas.
- Strong digital marketing campaign reached 1.7M views.
- Upcoming conference themed “Quality Sells” with high-calibre speaker line-up.
- Preparing for a levy renewal vote in August 2025.

Tomatoes NZ

- Overproduction and lowest prices since 2021.
- Export volumes up 42%; Australia reopened after PepMV restrictions lifted.
- Pests shifting from whitefly to caterpillars/aphids due to reduced spraying.
- Successful IPM workshops and ongoing extension efforts.

Horticulture Advocacy: The government’s focus on sustainability and innovation highlights the critical role horticulture plays in New Zealand’s economic growth. For Māori, this is an opportunity to leverage whenua-based enterprises and showcase kaitiakitanga practices on the global stage.

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Upcoming Events

- **Asia Fruit Logistica – Hong Kong:** September 4-6, 2025. Connect with global leaders in fresh produce. [More details here.](#)
- **Horticulture New Zealand (HortNZ) Conference:** scheduled for August 26-27, 2025, at the Tākina Wellington Convention and Exhibition Centre. This event will bring together growers, industry experts, and stakeholders to discuss the latest developments and challenges in the horticulture sector. For more details and registration information, please visit <https://www.hortnz.co.nz/>

He Karere Whakamutunga

Together, we are kaitiaki of the land, ensuring its bounty enriches our people and the world. Let's embrace the opportunities ahead with strength and unity. Kei te pakihwi tō pakihwi – shoulder to shoulder, we thrive.

Ngā manaakitanga,

Ratahi Cross

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