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 KIWIFRUIT REPORT
 GENERAL SUMMARY

N.Z. kiwifruit production in 1998 is expected to remain steady as orchardists concentrate on growing larger fruit to meet Kiwifruit New Zealand specifications. Total supply is forecast to increase only slightly to reach 245,000 MT. There is a general feeling of optimism in the kiwifruit sector, reflecting the launch of the new industry brand, Zespri, the introduction of new varieties and a sense that growers are in control of their industry.

Grower returns in the 1997 marketing year are expected to be below 1996 prices at the farmgate, reflecting disappointing fruit size, the strong N.Z. dollar and competition. Average grower returns are expected to increase slightly in 1998, but growers supplying organic and Chenensis fruit should earn premiums well above conventional kiwifruit. Kiwifruit exports in 1997 are expected to reach 210,000 MT.

In 1997 the N.Z. Kiwifruit Marketing Board separated its marketing and statutory roles. The statutory board is now referred to as Kiwifruit New Zealand (KNZ) and the marketing operations are carried out by Zespri International (Zespri), a wholly owned subsidiary of KNZ.

The Minister of Commerce has approved a proposal by KNZ to restructure onshore operations, but has requested more time to review KNZ's proposal to corporatize itself and transfer ownership to growers.

Additional industry developments since our last annual report have been included in NZ7014, NZ7022, and NZ7047.

The New Zealand dollar has weakened over the past month reflecting uncertainty about N.Z. economic performance, including the impact of the ongoing Asian currency crisis. (Calendar year, US\$:N.Z.\$; 1994=.5964, 1995=.6572, 1996=.6896, 1997e=.6740)

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 Kiwifruit

Global Economic Data Exchange System							
Commodity: Kiwifruit (0579500) (HECTARES) (METRIC TONS)							
Beg. Month/Year of Marketing Year:	01 / 96		01 / 97		01 / 98		
NEW ZEALAND	Revised 1996		Prelim 1997		Forecast 1998		
	Old	New	Old	New	Old	New	
Bearing Area	10211	10329	10215	10450	0	10500	
Non-Bearing Area	270	270	250	250	0	250	
TOTAL Area Planted	10481	10599	10465	10700	0	10750	
TOTAL Area Harvested	10211	10329	10215	10450	0	10500	
TOTAL Production	257	250	260	240	0	245	
Imports	0	0	0	0	0	0	
TOTAL SUPPLY	257	250	260	240	0	245	
Exports	227	220	230	210	0	215	
Domestic Consumption	30	30	30	30	0	30	
TOTAL DISTRIBUTION	257	250	260	240	0	245	

PRODUCTION

New Zealand export kiwifruit production in 1998 is expected to increase 2.0 percent to reach 215 thousand metric tons providing summer weather conditions remain favorable. The 1998 growing season has been excellent with cold winter conditions resulting in early, uniform bud-break. Warm and windy El Nino weather conditions are not expected to adversely affect crop production except for perhaps the odd vine loss due to wind. KNZ continues to ask for larger sized fruit and improved quality. In response, growers are intensively managing thinning and plant canopies in order to achieve the desired larger fruit size.

The 1997 kiwifruit harvest reached 63.1 million trays (227,000 metric tons) of export fruit. Fruit size decreased to an average count of 37.0 due to a less than favorable growing season with a warm winter and cool summer. The start of the 1997 harvest was advanced by the KiwiStart program (the harvest of early maturing blocks) and the first shipment to Japan arrived by the end of April, when the main pick was just beginning. Early shipments helped Zespri International to get a head start in European and Japanese markets over other Southern Hemisphere producers such as Chile. Crop management of the 1997 harvest was not deemed necessary by the KNZ.

Seasonal Conditions, Crop Area, Inputs, Yield and Quality

Weather conditions throughout the 1996/97 growing season were less than ideal. A warmer winter and cooler summer season led to small fruit size. Ample rainfall in late December 1996 caused vigorous vine growth and some growers got behind with pruning. This contributed to shading which reduces fruit growth. In a cool season, vines are less able to produce larger sized fruit. While many other fruit growing regions in New Zealand were hit by hail, the main kiwifruit growing district, the Bay of Plenty, suffered only one minor hail strike in 1996/97.

Producing vine area in 1997 has been revised upward slightly to 10,450

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 ha. Growing area peaked at 18,000 ha in the late 1980's, fell sharply following the disastrous 1992 season, and has been gradually increasing since 1995 reflecting industry optimism. Most of the new varieties, such as Chenensis, are being grafted onto existing Hayward vines.

Regional Production of Export Crop (percent)

Bay of Plenty / Waikato	78.4
Nelson	5.8
Northland	5.6
Auckland	5.6
Hawkes Bay	2.8
Gisborne	1.8
Total	100.0

The KiwiGreen pest management program, which relies on monitoring orchard pests, has resulted in sharp declines in chemical use in kiwifruit orchard operations. All kiwifruit taken by KNZ in 1997 met minimum KiwiGreen standards or better. The use of organic growing methods is outlined in a later section.

Yields of export fruit for the 1997 harvest are estimated to have fallen to 5,799 trays/hectare from 6,110 trays/hectare in 1996.

The 1997 crop was down 4.0 percent to 240 MT and significantly smaller in size compared to the previous year. The 1997 average export fruit size was 36.0 compared to 34.6 in 1996 and 34.5 in 1995. The average export organic fruit size decreased to 37.3 from 36.2 in 1996.

Production Policy

Over the past few seasons KNZ has pushed for larger sized fruit. Each season KNZ releases a Preferred Size Profile so growers can plan their pollination, early thinning and summer canopy management programs to ensure that conditions are optimum for fruit size development. However, poor climatic conditions in 1997 resulted in much smaller fruit - Class 1 fruit in 1997 ranged from sizes 18 to 42. In 1997 the average size of Class 1 fruit was 36.0 and 37.3 for organic, compared to 1996 when the average sizes were 34.6 and 36.2 respectively. The 1997 crop's overall smaller fruit size led KNZ to revise its indicative size payment profile for the 1997 season:

Size	Organic	Class 1
18	n/a	2.70
22	n/a	2.05
25	1.65	1.80
27	1.61	1.60
30	1.30	1.30
33	1.30	1.19
36	1.22	1.00

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39	0.85	0.85
42	0.62	0.60

The ratios are based on market returns for each size of fruit and are applied to the average fruit price. Prices paid include a packing and packaging component of N.Z.\$1.50. Source: KNZ

KiwiStart Program

The KiwiStart program enables KNZ sell kiwifruit earlier into export markets. By targeting early maturing lines of fruit, KNZ has shifted harvest from May to the beginning of April. In the 1997 season, the first fruit was picked in the first week of April, a week earlier than in 1996. In 1997 the KNZ packed 10.69 million trays of KiwiStart fruit, which started landing in foreign ports by the end of April 1997. Zespri International has targeted Japan, Taiwan and Korea with earlier fruit because they have been the most profitable markets and have low supplies of competing fruit. By supplying early maturing fruit, KNZ hopes to get a head-start on Chilean fruit. Organic fruit is included in the KiwiStart program. Growers are being encouraged by KNZ to plant the early Tomua variety. KiwiStart fruit picked in 1997 is expected to earn a N.Z.\$0.05/tray premium.

Organic Kiwifruit Production

Organic kiwifruit production has experienced rapid growth, increasing from 13,069 trays (47.0 MT) in 1991 to an expected 863,517 trays (3,108.6 MT) in 1997. In 1997 organic kiwifruit is expected to earn N.Z.\$7.68 per 3.6 kilogram tray compared with N.Z.\$4.26/tray for Class I fruit. Last season (1997) 55 certified organic kiwifruit growers produced 863,517 export trays; in 1998 one million trays are expected and in 1999 two million trays. Although most growers are already part-way down the path to organic production by being involved in the industry's minimal residue KiwiGreen program, industry sources do not expect more than 5 percent of growers to turn to organic growing. On average it takes a minimum of three seasons before a property is eligible for full Bio-Gro certification.

Over the past few years organically grown fruit has been an average two count sizes smaller than Class I fruit. The difference narrowed to just 1.2 count sizes for fruit harvested in 1997. Kiwifruit is not a difficult crop to grow organically, given it has a strong skin and is not susceptible to many pathogens except for fungi in the spring and storage rots. Input costs on organic kiwifruit orchards are higher than on conventional orchards. Even though organic growers save on herbicide costs, the use of more expensive "soft" *Bacillus thuringiensis* (Bt) sprays and mineral oil sprays negate any savings that might be made. Organic orchardists also buy more fertilizer from certified organic fertilizer producers, rather than making their own. In addition, this fertilizer is applied at 1.5 to 2.0 times the rate of conventional fertilizers. Organic growers also face the cost of certification and

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inspection with Bio-Gro NZ. On average organic growers have costs 10-20 percent higher than conventional kiwifruit growers.

Premiums paid to organic growers are significantly higher than the conventional kiwifruit return per tray. Although the margin between organic and conventional kiwifruit has been as high as 89 percent and

low as 27 percent, for the past two seasons organic premium margins have steadied in the 70-80 percent range. The margin is expected to narrow as organic production increases but currently most of the organic product is going into Japan, Zespri's highest priced market. The margin for organic fruit has two key drivers: the organic price premium within the market and the Japanese market premium. Zespri's marketing policy is to meet demand in the highest markets first while still sending enough fruit to developing markets.

N.Z. Conventional/organic Kiwifruit Production and Prices

Year	Conventional/ Kiwigreen (trays)	N.Z.\$ per tray	Organic (trays)	N.Z.\$ per tray
1991	59,848,342	\$6.08	13,069	\$10.45
1992	67,271,811	\$3.85	20,243	\$7.29
1993	54,782,552	\$4.18	51,014	\$7.03
1994	55,914,704	\$4.63	406,665	\$5.88
1995	58,743,401	\$4.22	620,095	\$6.23
1996	62,437,235	\$4.35	759,713	\$7.18
1997e	59,063,380	\$4.30	863,517	\$7.68

Note: 1 tray = 3.6 kilograms. Source: MAF, KNZ

New Varieties Coming Off the Vine

New Zealand kiwifruit growers are experimenting with two new varieties - Chenensis 16A and a new early Hayward variety. Chenensis is the result of an 18 year breeding program carried out first by the Department of Scientific and Industrial Research and then by HortResearch, jointly funded by the government and the kiwifruit industry. Field trials began in 1991 and 1992. Extensive trial plantings in 1996 were made but growers were only offered Chenensis plant material in April 1996. Many more growers have shown interest in planting over the next few years. Most growers are grafting Chenensis onto existing vines to achieve early maturity. The KMB is reluctant to disclose the how many hectares are planted in Chenensis, however it is known that the largest planting is 27 hectares. Chenensis plant material is in short stock as there are only a few nurseries producing grafted plants. Plants are now worth N.Z.\$15 compared to N.Z.\$6.00 ten years ago. Chenensis and Hayward are best grown on separate blocks as bud burst comes earlier for the new variety and flowers at a different time. Although both varieties are harvested at the same time, the Brix level at harvest is different.

The Chenensis variety is significantly different to the conventional Hayward fruit. It has a golden colored flesh, a less hairy skin, an

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 oval shape, and a tropical taste like mango and melon. Due to its different shape and protruding "beak" at the distal end, the fruit will require different handling methods and packing. Chenensis export production in 1997 is estimated to be around 4,411 trays or 15.8 metric tons. Small trial shipments were sent to Asia, Europe and Japan.

Chenensis returns in 1997 are expected to reach N.Z.\$13.60/tray - well up on the forecast return of N.Z.\$4.30 for a tray of conventionally grown Hayward. However, some growers are asking if such a margin is equitable as it was Hayward growers who funded the plant breeding research and feel they should be entitled to a share of the margin.

CONSUMPTION

Domestic kiwifruit marketing has received a welcome lift in profile since Zespri International took over the marketing duties of KNZ and introduced the "Zespri" brand. Zespri International supplied 1.5 kg pre-packed ZESPRI kiwifruit to the domestic market giving New Zealanders a chance to taste Class I fruit in a bid to improve consumer confidence

in kiwifruit. N.Z. consumers have, in the past, had to put up with a generally poor standard of fruit as export market's needs have had priority. Domestic Zespri advertising has featured slogans such as "fast food for health" and "when a fruit's this ugly it's got to taste great" on billboards in the main cities of Auckland, Tauranga, Wellington and Christchurch. Increasing use of cool storage and CA storage means kiwifruit is available nearly the entire year. Domestic retail kiwifruit prices strengthened in 1997.

Stocks: The cost of fruit deterioration and loss have led KNZ to manage and control kiwifruit inventory better. However, to meet individual market requirements, KNZ is gradually increasing the amount of fruit stored in bulk for later packing. Benefits include an overall reduction in fruit handling, improved fruit quality and a reduction in packaging waste. In 1997 35.0 million trays of kiwifruit were stored, which is expected to earn growers a N.Z.\$0.37/tray storage incentive.

TRADE

The 1997 crop saw the first N.Z. kiwifruit branded with the "Zespri" label, which was matched by aggressive "Zespri" marketing campaign in Japan and Europe. Zespri International used bright Citroen and Volkswagen cars to travel around Europe promoting Zespri kiwifruit and encouraging consumers to try the fruit. The promotion was closely linked to European retailers so consumers could have a free taste then buy the fruit. Zespri International also promoted N.Z. kiwifruit on Belgium's coastal train which transports many Europeans to their holiday destinations. In Japan, Zespri used 15 second slots of television advertising, capitalizing on New Zealand's popular rugby image. Market conditions in Europe were competitive with much greater Italian/French carry-over volumes and a larger volume of imported Chilean kiwifruit. The Zespri marketing team encountered consumer resistance to the smaller

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fruit size which was compounded by high stocks. Overall, Zespri had an excellent season in Europe with strong sales YTD reaching 115,530 MT. KNZ has approved a market trial of large-sized Class II fruit to be exported to several markets outside Australia. The product will be marketed under the K1W1 brand not under "Zespri". Zespri International also plans to start marketing Class 1 fruit in India in 1998, and aims to have kiwifruit in the market by June next year. Emerging markets include Malaysia, Indonesia, North America and the Middle East. The currency crisis had little effect on overall sales thus far, but prices were reduced to compensate for the Won's depreciation. Zespri's focus in Hong Kong and China continues to be the establishment of distribution systems. Exports in 1998 are expected to remain steady at 215,000 MT but sales to Europe and Japan may have to compensate for lost sales to Asian countries such as Korea, Taiwan and Malaysia.

N.Z. Kiwifruit Exports, Calendar years, tons

Destination	1995	1996	1997 Jan/Oct
E.U.	108,812	113,801	115,530
Japan	31,616	43,328	34,444
Canada	9,310	11,679	6,050
Australia	14,714	18,141	11,801
Taiwan	6,973	9,894	7,676
Korea	2,912	5,058	4,568
Argentina	4,260	6,525	2,662
Hong Kong	2,599	2,659	1,745
Mexico	855	1,063	774
China	547	818	624
Saudi Arabia	1,126	1,297	1,203
Other	6,412	6,057	5,758

TOTAL	190,137	220,320	192,834
NEW ZEALAND KIWIFRUIT EXPORTS, NZ\$/ton			
	1995	1996	1997
Destination			Jan-Oct
E.U.	1,823	1,782	1,586
Japan	3,154	2,556	2,755
Canada	997	1,170	1,170
Australia	1,222	875	906
Taiwan	1,884	1,865	2,234
Korea	1,877	1,997	1,903
Argentina	1,509	1,481	1,019
Hong Kong	1,831	1,663	2,416
Mexico	1,097	889	1,279
China	1,748	1,701	2,020
Saudi Arabia	1,722	1,566	1,732
Other	1,187	1,235	1,323
TOTAL	1,928	1,805	1,766

Source: New Zealand Department of Statistics

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 MARKETING

 Unfavorable exchange rates are forecast to reduce N.Z. market returns this season despite sales being up over the same period last year. KNZ's December return forecast is N.Z.\$260.7 million (U.S.\$175.7 million), down N.Z.\$15.6 million (U.S.\$10.5 million) from the previous season's return of N.Z.\$275.1 million (U.S.\$189.7 million). The December forecast represented a N.Z.\$0.02 per tray drop in grower returns over the November forecast of N.Z.\$262.8 million (U.S.\$177.1). The December forecast reflects lower returns in Asian markets as the result of their economic and currency crisis. The actual 1997/98 season return will be confirmed in April 1988.

Orchard gate returns for the 1997 season are expected to be N.Z.\$4.30 per tray, down 1.1 percent on the previous year's final return of N.Z.\$4.35 per tray. Initially KNZ's estimate was N.Z.\$3.87 per tray in August, but due to a strong selling season in Europe, estimates were revised upward in September (N.Z.\$4.07/tray), October (N.Z.\$4.20/tray), November (N.Z.\$4.32/tray) and December (N.Z.\$4.30/tray).

NZ KIWIFRUIT FARMGATE RETURNS (NZ\$/tray = NZ\$/3.6 kg)

	1995	1996	1997p	1998f
\$/tray farm gate	\$4.22	\$4.35	\$4.30	\$4.40

Note: based on trays submitted, not trays sold. SOURCE : KNZ

POLICY

Recommendations made in the 1995 Industry Review (See the policy section of GEDES NZ7002) are now being implemented. The NZKMB has been split into a statutory board (Kiwifruit New Zealand (KNZ)) and a separate marketing subsidiary (Zespri International). The functions of Kiwifruit New Zealand include industry governance, industry strategic planning, consideration of collaborative marketing proposals, industry politics, grower communication and accountabilities, along with compulsory acquisition of the crop and its sale. The KNZ is composed of four growers members and three commercial members. The marketing company, which is a wholly owned subsidiary of the statutory body, has adopted the marketing and commercial functions of the NZKMB.

The industry is proposing to implement additional recommendations stemming from the 1995 review referendum regarding corporatization and offshore operations. The corporatization proposal would give growers ownership of Kiwifruit New Zealand, the ZESPRI brand, and some fixed assets. Until its enabling legislation is amended, Kiwifruit New Zealand will be corporatized as a "shadow" cooperative with shares owned

by growers. Shares in KNZ will be initially allocated to growers on the basis of one share per rounded hundred trays sold (except for frost and hail damage, transition to new varieties etc). The initial share allocation will be based on the last three years production with the ongoing allocation on the basis of a three year rolling average. There will be one vote per share. Zespri International will remain 100 percent owned by KNZ.

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Under N.Z. law, however, it is not now possible to corporatize KNZ as an independent company and maintain single seller powers. Should deregulation occur in the future, the shadow cooperative is expected to be the vehicle for the industry to decide how it is to structure itself. The new ownership structure establishes security and certainty of ownership, and should deregulation (elimination of the statutory powers) occur, the shareholders of KNZ will become the shareholders of Kiwifruit New Zealand Ltd with tradeable shares. Minister of Commerce John Luxton has declined a "fast-track" approach by KNZ to enable corporatization to be in place by 1 April 1998. Although the Minister supports the corporatization proposal, he was wary of rushing the consultation phase and mindful of the time it takes to pass legislation. However, he has approved the onshore restructuring, outlined below, to be carried out.

Significant efforts toward restructuring of KNZ's onshore activities are underway and are expected to be in place for 1998. Present KNZ involvement in activities such as inventory management, grower pool administration, N.Z. transport and quality control are to be removed. The reform of industry operational structures in Stage III includes shifting the point of supply between the grower and marketer to free on board stowed (FOBS). The point of purchase will move from the inwards coolstore door to FOBS. Thus suppliers will be responsible for all activities up to this point, including coolstorage, transport to the wharf and stevedoring. KNZ expects growers to work in several different ways: either supplying the fruit direct to KNZ; selling or leasing to an intermediary; or joining with other growers to form a trust to pool risk (a Supplier Entity). In return for a lien on the fruit, KNZ will continue to make progress payments prior to taking ownership of the fruit. KNZ believes more Supplier Entities will be formed in 1998 to provide services from coolstore to FOBS. KNZ will form a company called the Autonomous Kiwifruit Supply Company to provide these services for those growers, packhouses and coolstores who can not individually supply to FOBS or do not wish to be part of a supplier entity.

Standards and quality onshore will be the responsibility of the suppliers. KNZ will set standards at FOBS which will include both fruit quality and historical procedure standards for acceptability, e.g. spray regimes. Suppliers remain responsible for the fruit quality until fruit is discharged at port of destination plus 10 days. Any fruit which does not meet export standards within that period may incur penalties. Suppliers will be paid the return at FOBS and will take responsibility for making payments to coolstores, transport companies or stevedores, in addition to packing and picking costs.

ZESPRI and APMB Work Together in United Kingdom
Zespri International and the New Zealand Apple and Pear Marketing Board (APMB) are to merge their sales and marketing operations in the United Kingdom. Zespri and APMB have been working closely to explore areas where they can maximize competitive advantage globally through greater

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cooperation. The merged sales and marketing operation means key business partners will have a single point of contact for N.Z. apples, pears and kiwifruit in the UK. Each organization will use its own brand, retain ownership of its products and invoice customers separately.

New Chairman for Kiwifruit New Zealand in 1998

Doug Voss, a Tauranga grower and post-harvest operator, is the newly elected chairman of Kiwifruit New Zealand. He replaces retiring chairman John Palmer, who has been Chairman since 1991. Mr Voss was initially a member of the Kiwifruit Authority in 1988 and became one of the first grower members of the Kiwifruit Marketing Board, which established the single desk seller.

Kiwifruit New Zealand Wins Right to Market Foreign Fruit
See NZ7047.

Appendix: N.Z. Kiwifruit Historical Data

	1992	1993	1994	1995	1996
CROP VOLUME					
Return per tray (NZ\$)	\$3.85	\$4.30	\$4.90	\$4.22	\$4.35
Trays submitted (000's)	67,652	55,343	55,807	58,773	63,113
Trays sold	52,273	49,218	49,891	48,652	56,247
Trays sold (percent)	77	89	89	83	89
Crop management (trays)	n/a	1,843	1,104	3,901	1,339
Fruit loss/unsold (trays)	15,379	4,282	4,812	6,220	5,527
GENERAL					
Number of growers	3,327	2,748	2,335	2,205	1,596
Ave. no. trays submitted per grower	20,334	20,139	23,900	26,654	39,545
Number of orchards	3,724	3,276	2,833	2,796	2,757
Planted hectares	14,594	12,256	10,161	10,210	10,329
Yield per hectare (trays)	4,636	4,516	5,492	5,756	6,110
Orchard return per ha	\$2,988	\$15,312	\$18,210	\$14,860	\$16,134
PACKHOUSES/COOLSTORES					
Number of packhouses	349	252	190	148	137
Ave. no. trays packed per packhouse	193,845	212,300	287,907	370,754	450,904
Number of coolstores	180	146	125	119	106
Ave. trays stored per coolstore	375,844	366,436	437,618	461,105	582,772
Source: N.Z. Kiwifruit Marketing Board Annual Report					
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