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New Zealand

Fresh Deciduous Fruit Annual

Apple and Pear Growing and Trade Annual Report 2015

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Report Highlights:
The deciduous fruit sector in New Zealand is now celebrating its third successive year of profitable returns and is in expansion mode. Registered plantings are likely to be up eight percent in 2015/2016. Production is set to break out of the biennial bearing cycle to reach 565,350 metric tons in 2015/2016. Exports are likely to follow suit and be up three percent at 342,000 metric tons.

Executive Summary

The deciduous fruit sector in New Zealand is experiencing its third year of solid profits. The sector is now well into a major expansion phase, moving towards a goal of increasing export receipts to NZ$ one billion by 2022. Year-to-date 2014/2015 exports are valued at NZ$620 million, the best result ever.

Planted deciduous tree area is estimated to be up eight percent for 2015/16 at 9,750 hectares (ha). Harvested area is estimated at 9,500 ha, a six percent increase compared to 2014/2015. New high color varieties, primarily targeting Asian tastes, are being planted.

A cold dry winter in the Hawkes Bay region followed by a rapid increase in temperatures in October 2015 set the trees up for a compressed high volume flower blossoming in October. This augers well for the harvest in March/April 2016. Total deciduous fruit production for 2015/2016 is forecast to increase two percent, reaching a level of 565,350 metric tons (MT).

With a greater volume of domestically produced apples in abundance during 2014/2015 it is estimated that domestic consumption of apples and pears will be 80,500MT, a seven percent upward shift from the previous year. Again for the 2015/2016 year there will be plenty of domestic fruit in the market and consumption is expected to remain at 80,000MT.

The greater volume of the apple crop which has made export grade in 2014/2015 means processing volumes are unlikely to have increased as much as was expected back in April 2015. It is now estimated total deciduous fruit processing volumes will be 147,350MT which is still a 28% increase over the 2013/2014 year. Total processing volume in 2015/2016 is forecast at 147,750MT.

For the current year 2014/2015 total deciduous fruit exports are now expected to reach 331,000MT which amounts to a three percent increase from previous estimates. More of the total crop was export grade than had been expected after the hail and storm damage, which has now facilitated the export tonnage increase. For 2015/2016 it is forecast the volume will rise to 342,000MT, a gain of three percent.

Extraordinary growth in the Asian markets has translated into large export volumes for New Zealand. In fact, in 2014/2015 about 40% of the New Zealand apple export volume has gone to Asian destinations, up from 31% just two years ago. In contrast New Zealand apple exports to Europe and the UK, for so long the key region for export volume demand and overall export returns, have diminished from taking 41% of the export volume in 2012/2013 to this year, 2014/2015, 38%.

A key element in the relative success enjoyed by New Zealand deciduous fruit exporters in Asian markets has been the negotiation of market access protocols containing sanitary and phyto-sanitary (SPS) conditions that growers in New Zealand can comply with.

Note1: The Marketing Year MY2014 is from Jan1, 2015 to Dec31, 2015 and will be referred to as 2014/2015 in the text to conform to Northern Hemisphere country marketing years. Similarly MY 2015 will be shown as 2015/2016 and refers to Jan 1, 2016 to Dec 31, 2016. CY2015 refers to the calendar year 2015.

Note2: A TCE stands for Tray Carton Equivalent and is 18.0 kilograms of fruit. FOB stands for Free-On-Board which denotes the value of a product once it is loaded on board ship ready for departure.

Planted and Harvested Area

Apples

The sector is now well into a major expansion phase especially in the largest growing area Hawkes Bay (comprising 65% of the total deciduous area). No up-to-date accurate area survey information is available yet for 2015/2016. However it is estimated that there is at least 9,325 hectares (ha) planted of which 9,100 ha will be harvested. This would put the planted area at eight percent greater than the 2014/2015 year and the forecast harvested area at 6.5% ahead.

Table of Deciduous Fruit Plantings in New Zealand by Variety (in Hectares)										
Market Year for FAS	MY2005	MY2006	MY2007	MY2008	MY2009	MY2010	MY2011	MY2012	MY2013	MY2014
Calendar Year of Harvest	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Braeburn	2,464	2,484	2246	2034	1,869	1740	1589	1504	1381	1352
Royal Gala & sports	2,872	2,893	2669	2538	2,417	2423	2369	2386	2337	2410
Cox	354	314	295	281	248	236	203	178	150	134
Fuji	875	836	829	899	931	970	934	906	832	837
Granny Smith	322	294	286	282	267	256	256	246	240	219
Cripps Pink/Pink Lady	287	248	285	353	397	434	446	459	443	461
Jazz	440	576	768	917	977	983	943	905	869	855
Pacific Beauty	250	177	162	149	135	127	120	113	92	84
Pacific Queen	306	223	212	220	263	291	351	456	622	730
Pacific Rose	642	529	454	424	416	399	396	390	379	364
Pacific series Sub-Total	1,198	929	828	793	814	817	867	959	1,093	1,178
Envy					88	174	272	285	315	346
Other Varieties /Unidentified	184	192	333	388	624	437	445	544	769	850
Total Apple Area	8,996	8,766	8,539	8,485	8,632	8,470	8,324	8,372	8,429	8,642
Total Pear Area	722	735	412	412	429	473	441	448	403	407
Total	9,718	9,501	8,951	8,897	9,061	8,943	8,765	8,820	8,832	9,049
Braeburn as % of Apple Area	27.4 %	28.3 %	26.3 %	24.0 %	21.7 %	20.5 %	19.1 %	18.0 %	16.4 %	15.6 %
Royal Gala as % of Apple Area	31.9 %	33.0 %	31.3 %	29.9 %	28.0 %	28.6 %	28.5 %	28.5 %	27.7 %	27.9 %

Source: PNZI registered area

Braeburn which once comprised 31% of the total area is now down to 16% and Braeburn trees continue to be pulled out. In addition Cox and Pacific Beauty areas are being reduced.

The new varieties which are being planted are: Aztec, Fuji Supreme, Kiku, and Candy which will all be to replace the standard Fuji variety. In addition new cultivars such as Smitten, Plumac (brand name "Koru"), Sweetango, Ambrosia, and Kansi are being planted. While the Royal Gala area remains reasonably stable there has been considerable replanting of new high color Royal Gala sports on dwarf and semi-dwarf rootstocks. Areas of two significant varieties: Envy and Pacific Queen are expanding rapidly.

Honeycrisp is a U.S. cold climate variety which is being grown mid-way down the South Island under a limited area license for out of season sales back to the U.S. (Last harvest's sales realized NZ$90/TCE versus the industry average of NZ$33/TCE on a FOB basis). Rockit is a small apple four to five centimeters in diameter being promoted as a snack alternative and sold in clear plastic tubes of three to six fruit. There is now approximately 150ha of this variety planted.

Pears

It is forecast that with the new pear cultivars now available to growers the pear area planted for the 2015/2016 year will be up four percent at 425ha. The harvested area is estimated to be stable at 407ha.

Apple Production

2015/2016

A cold dry winter, June to August 2015, especially in the Hawkes Bay region followed by a rapid increase in temperature in October 2015 set the trees up for a compressed high volume flower blossoming in October. This augers well for the harvest in March/April 2016. Even though 2014/2015 was biennial bearing "on" year which would suggest 2015/16 would be an "off" year the combination of increased harvest area and the high quality flowering and good tree health is likely to mean production will break away from the biennial bearing cycle to a large extent. It is now forecast total production will be 551,150 metric tons (MT), two percent up on 2014/2015.

The weather is always a risk factor and the spectre of a strong El Nino induced drought is looming for this coming summer. Growers do have irrigation but if water restrictions kick in this could impact on production in some districts. The risk is rated as low at this stage.

Growers are now very focused on optimizing fruit quality at the highest yields possible. Included in the techniques to do this are:

- A gradual and ongoing conversion to intensive plantings of dwarf/semi-dwarf trees at approximately 2,000 trees/ha which only grow three to four meters high;

- Use of growth regulators and dormancy breakers is now widespread and can manipulate tree behavior significantly;

- Reflective cloth mulch laid inter-row and under tree to help achieve high color fruit in the narrowing harvest window; and

- Fruit thinning systems have advanced but are probably about to undergo another step change as "artificial spur extinction" (removal of floral buds just prior to bud break) becomes more prevalent as a practice.

At the post-harvest stage the use of Smartfresh™ (a chemical flush of the coolstore atmosphere) has significantly increased the level of fruit quality for fruit stored for extended periods. The Royal Gala variety seems to benefit the most.

Apart from variable weather the biggest issues facing the sector now are:

- A shortage of seasonal labor especially at harvest which became severe during the 2014/2015 harvest. It caused some lower value fruit to be left on trees until past the optimum harvest dates.

- Bio-security at the NZ Border. Being relatively free of many pests and diseases the sector lives in fear of harmful pathogens being introduced as a result of the big increases in tourism numbers and food/vegetation or used vehicle imports.

- European Canker, a nasty tree disease which can decimate whole blocks, is an ongoing problem especially in the Nelson region. Very good management will suppress the disease but not eliminate it.

2014/2015
The biennial bearing "on" year boost trumped the loss of approximately 18,000MT of fruit from hail and storm damage events in the 2014/2015 growing season which will mean that total production is being held at an estimated 540,500MT, no change to the previous forecast.

Pear Production

2015/2016
Pear production is expected to bounce back from losses in the 2014/2015 season and is estimated at 14,200MT, representing a five percent increase.

2014/2015
Total Pear production for 2014/2015 is now estimated at 13,500MT. This is a six percent reduction from earlier forecasts owing to hail and storm damage losses.

Grower Returns

The current year 2014/205 has been another good one financially for growers with FOB prices 13% greater than 2013/2014. This combined with better average yields means the average grower has probably had per hectare revenue increases in the order of 15%. The price increases are mostly the result of the NZ dollar depreciating against the other main currencies the fruit is sold in during the main shipping period. This is now the third year of good returns to growers which have boosted their confidence and supplied a steady stream of cash to fund re-investment into their orchards to re-plant with new varieties and increase planted area.

Consumption

Apples

With a greater volume of domestically produced apples in abundance during 2014/2015, it domestic consumption is estimated at 70,000MT, an eight percent upward shift from the previous year. Consumption was reportedly ahead of expectations during the March through May period which supports the increased estimate. Again for the 2015/2016 year there will be plenty of domestic fruit in the market and consumption is expected to remain at 70,000MT.

Pears

Pear consumption is now being estimated at 10,500MT for 2014/2015, three percent up on previous forecast, which takes into account an increase in imports. For 2015/2016 consumption of pears is forecast to return to 10,200.

Processing

The greater volume of the apple crop which has made export grade in 2014/2015 means processing volumes are unlikely to have increased as was expected back in April 2015. It is now estimated total deciduous fruit processing volumes will be 147,350MT which is still a 28% increase over the 2013/2014 year.

It is forecast total processing volumes in 2015/2016 will be 147,750MT.

Production, Supply, and Distribution Tables

Apples, Fresh New Zealand	2013 2013/2014			2014 2014/2015			2015 2015/2016	
	Market Year Begin: Jan 2014			Market Year Begin: Jan 2015			Market Year Begin: Jan 2016	
(HA)/(MT)	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	New Post
Area Planted	8,400	8,429	8,429	8,700	8,642	8,642		9,325
Area Harvested	8,300	8,325	8,325	8,600	8,550	8,550		9,100
Bearing Trees	0		0	0	0			0
Non-Bearing Trees	0		0	0	0			0
Total Trees	0	0	0	0	0	0		0
Commercial Production	469,900	469,893	470,020	525,000	525,000	525,000		535,650
Non-Comm. Production	15,500	15,500	15,500	15,000	15,500	15,500		15,500
Production	485,400	485,393	485,520	540,000	540,500	540,500		551,150
Imports	800	843	873	1,000	750	850		850
Total Supply	486,200	486,236	486,393	541,000	541,250	541,350		552,000
Fresh Dom. Consumption	61,800	64,843	65,000	80,000	70,000	70,000		70,000
Exports	310,900	307,893	307,893	315,000	315,000	327,000		337,000
For Processing	113,500	113,500	113,500	146,000	156,250	144,350		145,000
Withdrawal From Market	0	0	0	0	0	0		0
Total Distribution	486,200	486,236	486,393	541,000	541,250	541,350		552,000
TS=TD		0	0		0	0		0

Pears, Fresh New Zealand	2013 2013/2014			2014 2014/2015			2015 2015/2016	
	Market Year Begin: Jan 2014			Market Year Begin: Jan 2015			Market Year Begin: Jan 2016	
(Ha/MT)	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	New Post
Area Planted	400	403	403	400	407	407		425
Area Harvested	400	403	403	400	407	407		407
Bearing Trees	0	0	0	0		0		
Non-Bearing Trees	0	0	0	0		0		
Total Trees	0	0	0	0	0	0		0
Commercial Production	13,400	13,372	13,400	14,200	14,175	13,300		14,000
Non-Comm. Production	200	200	200	200	200	200		200
Production	13,600	13,572	13,600	14,400	14,375	13,500		14,200
Imports	3,700	3,700	3,700	3,600	3,600	4,100		3,750
Total Supply	17,300	17,272	17,300	18,000	17,975	17,600		17,950

Fresh Dom. Consumption	**10,000**	**10,000**	**10,000**	**10,200**	**10,200**	**10,500**		**10,200**
Exports	**5,400**	**5,372**	**5,372**	**5,000**	**5,000**	**4,100**		**5,000**
For Processing	**1,900**	**1,900**	**1,928**	**2,800**	**2,775**	**3,000**		**2,750**
Withdrawal From Market	**0**	**0**	**0**	**0**	**0**	**0**		**0**
Total Distribution	**17,300**	**17,272**	**17,300**	**18,000**	**17,975**	**17,600**		**17,950**
TS=TD	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

Note: Data included in this report is not official USDA data. Official data can be found at http://www.fas.usda.gov/psd

Trade

Apple Exports

For the current year 2014/2015 apple exports are now expected to reach 327,000MT which amounts to a four percent increase from previous estimates. The year-to-date (September) total exported is 325,000MT and in the remaining months shipments tail off but historically are usually 2,000MT to 3,000MT. More of the total crop was export grade than had been expected after the hail and storm damage, which has now facilitated the export tonnage increase.

New Zealand Export Statistics for Fresh Apples

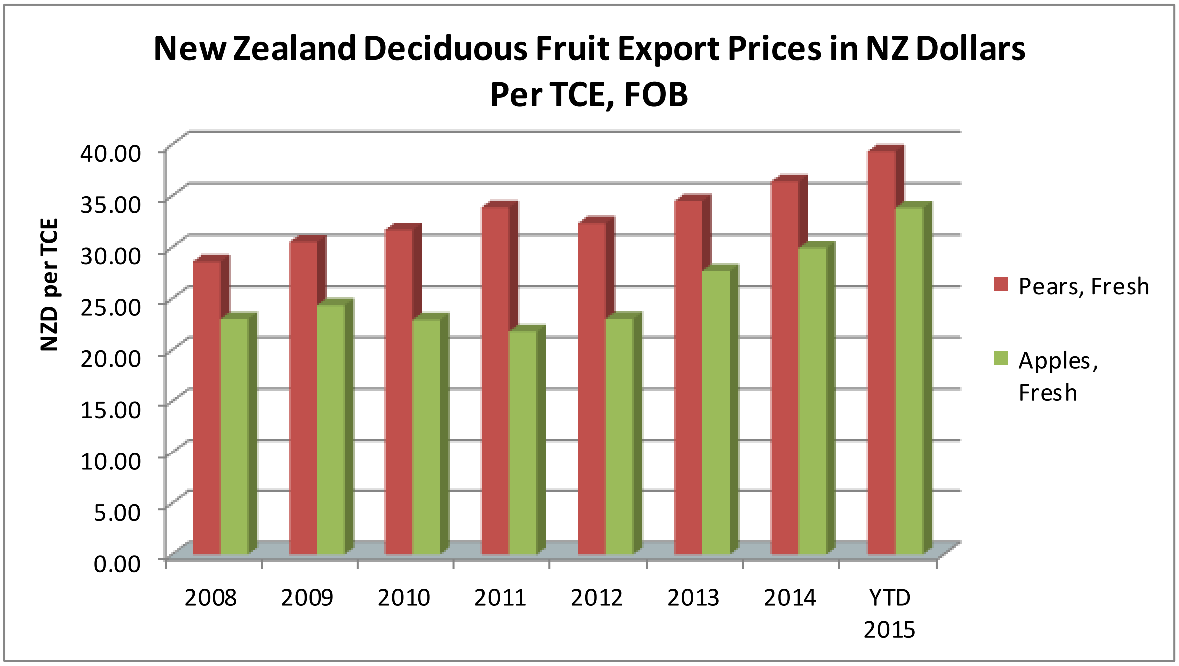
Year To Date: January - August

Partner Country	2013		2014		2015		Qty % change '15 ovr '14
	Quantity (MT)	% share of Tot. Qty	Quantity (MT)	% share of Tot. Qty	Quantity (MT)	% share of Tot. Qty	
Sub-total Europe excl UK	92,432	29.4%	88,707	29.4%	73,327	22.9%	-17.3%
United Kingdom	43,923	14.0%	41,548	13.8%	47,236	14.7%	13.7%
United States	38,744	12.3%	40,345	13.4%	32,050	10.0%	-20.6%
Thailand	24,222	7.7%	17,178	5.7%	27,392	8.5%	59.5%
Taiwan	8,858	2.8%	19,876	6.6%	21,995	6.9%	10.7%
China	9,793	3.1%	1,966	0.7%	20,246	6.3%	929.8%
United Arab Emirates	17,906	5.7%	11,422	3.8%	17,706	5.5%	55.0%
India	15,027	4.8%	12,466	4.1%	14,881	4.6%	19.4%
Hong Kong	11,034	3.5%	10,563	3.5%	10,079	3.1%	-4.6%
Singapore	7,706	2.4%	8,455	2.8%	7,774	2.4%	-8.1%
Rest of the World	45,086	14.3%	49,282	16.3%	47,810	14.9%	-3.0%
World Total	**314,729**	**100.0%**	**301,808**	**100.0%**	**320,497**	**100.0%**	**6.2%**

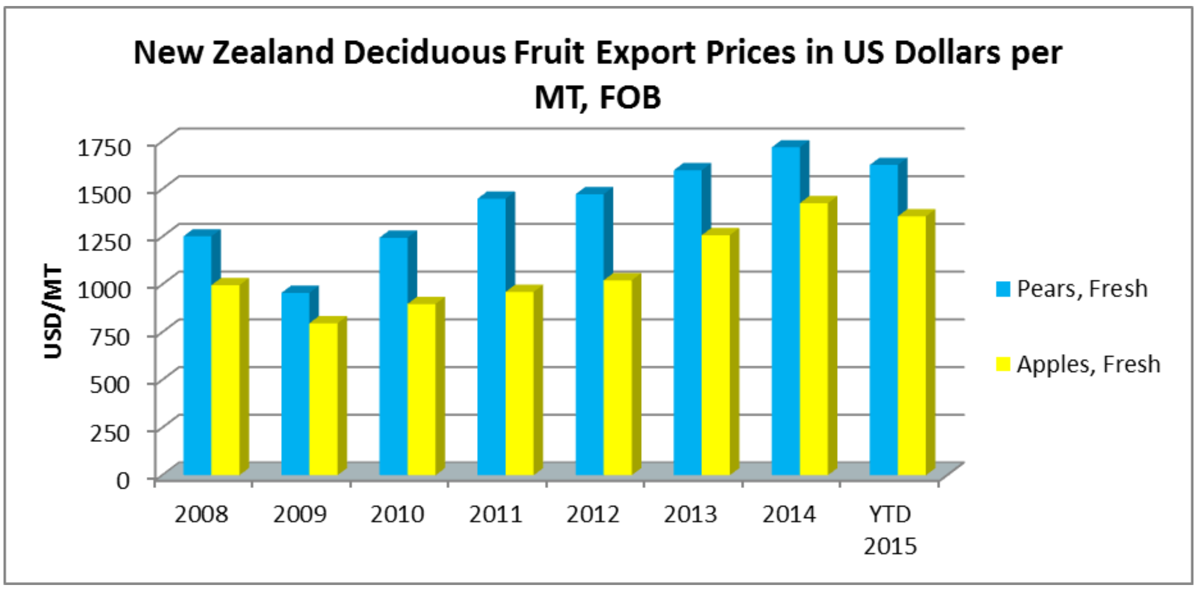
Source: GTA

Looking ahead to 2015/2016 it is forecast that nearly all the total production increase expected will translate into export volume growth. At 337,000MT for 2015/2016 this would represent a two percent increase over 2014/2015.

The clear diversification away from reliance on the UK and Europe as the main destination is very much in evidence in 2014/2015 and is really paying off with significantly increased export returns now being achieved.

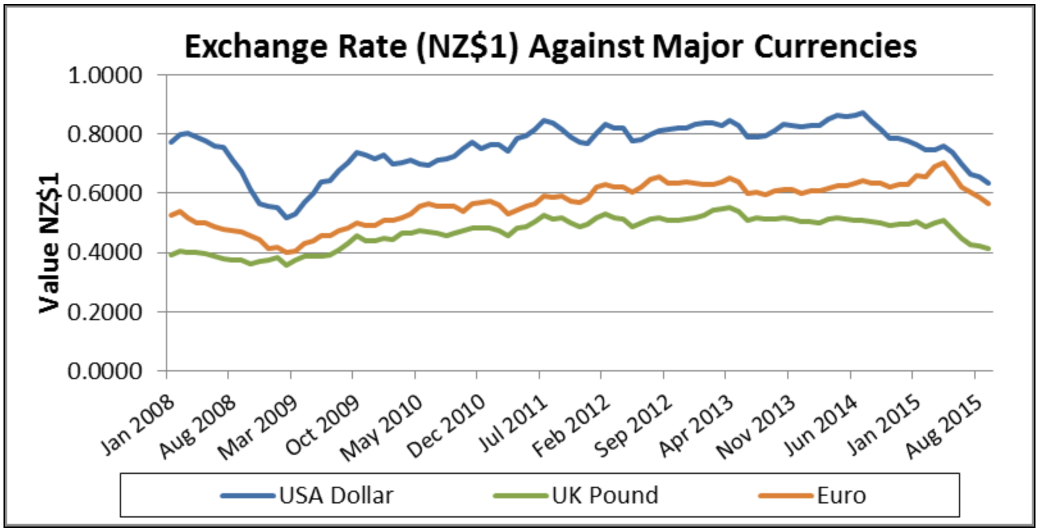


Source: GTA

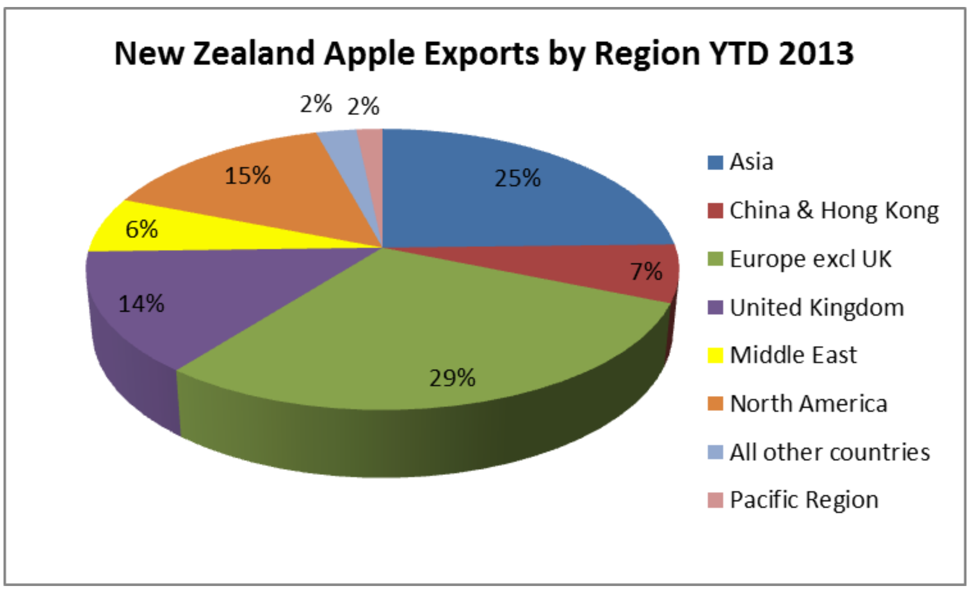


Source: GTA

For the year-to-date 2014/2015 in-market returns haven't been quite as good as the previous year however the depreciation of the New Zealand dollar against the major trading currencies (USD, UK Pound, Euro) has meant the export returns actually repatriated back to New Zealand have kept growing.

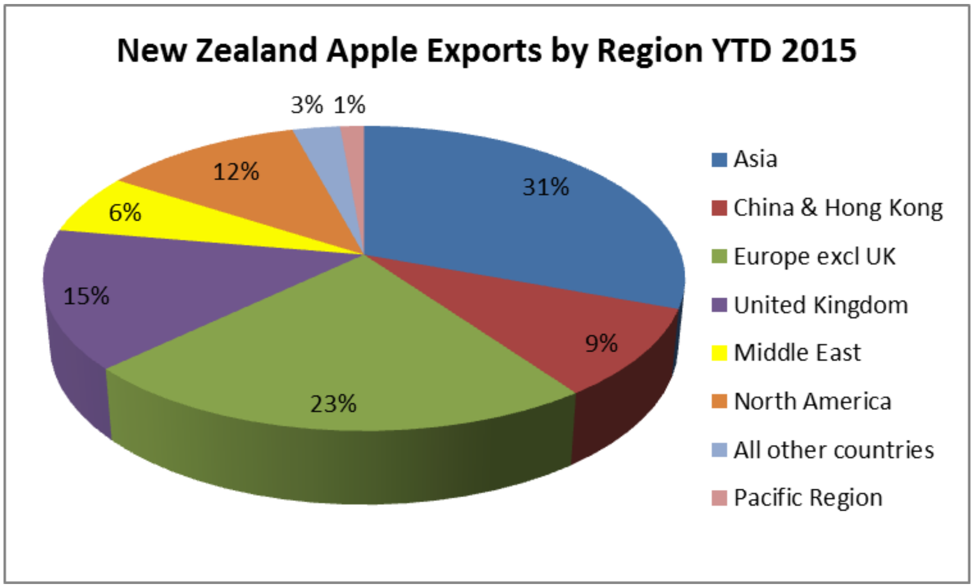


Source: RBNZ



Source: GTA

Over the last two years there has been extraordinary demand growth from the Asian markets. This year 40% of the total New Zealand apple export volume has gone to Asian destinations, up from 31% two years ago. In contrast New Zealand apple exports to Europe and the UK, for so long the key region for export volume demand and overall export returns, have diminished from taking 41% of the export volume in 2012/2013 to this year, 2014/2015, 38%. This trend is set to continue as the new apple tree plantings produce fruit. Nearly all the new plantings in recent years are varieties aimed specifically at Asian markets or suited to either Asian or European markets.



Source: GTA

The other key element in the relative success of New Zealand apple exporters in Asian markets has been the negotiation of market access protocols, especially for sanitary, phyto-sanitary (SPS) conditions which growers in New Zealand can comply with. This has been helped by the completion of Free Trade Agreements (FTA) with many countries in the Asian region which has given New Zealand market access officials better access to their counterparts in the destination countries. Specifically New Zealand has FTA's with Singapore, Thailand, Malaysia, China and Hong Kong, Taiwan, and with the wider ASEAN group through the ASEAN-Australia-New Zealand Free Trade Agreement. An FTA with South Korea has been signed but has still to come into force. Additionally the Trans Pacific Partnership (TPP), a FTA which links 12 Pacific Rim countries including Japan, US, Canada, and Vietnam, has been signed. When it comes into force, the TPP should also facilitate better market access.

Logistics into Asia are quicker and cheaper than European destinations, and exporters can more easily calibrate their shipments to market requirements.

Problems with market access into China in 2013/2014 have been overcome in 2014/2015 under the new SPS protocol for apples.

New Zealand Export Statistics For Fresh Apples							
Calendar Year: 2012 - 2014							
Partner Country	Quantity (MT)			% Share			% Change 2014 over 2013
	2012	2013	2014	2012	2013	2014	
Total Exports to Europe/EU	76,155	92,432	88,707	26.77	28.69	28.81	-4.03
United Kingdom	44,024	43,923	41,548	15.48	13.63	13.49	- 5.41
United States	33,811	38,788	40,345	11.89	12.04	13.10	4.01
Thailand	21,940	27,078	20,220	7.71	8.41	6.57	- 25.33
Taiwan	12,217	8,858	19,876	4.29	2.75	6.46	124.38
India	18,122	15,048	12,487	6.37	4.67	4.06	- 17.02
United Arab Emirates	13,169	18,096	11,422	4.63	5.62	3.71	- 36.88
Hong Kong	14,007	11,395	10,670	4.92	3.54	3.47	- 6.36
Singapore	7,387	8,148	8,747	2.60	2.53	2.84	7.36
Russia	4,586	6,422	8,460	1.61	1.99	2.75	31.74
Vietnam	2,969	3,794	8,326	1.04	1.18	2.70	119.44
Canada	4,989	7,918	7,664	1.75	2.46	2.49	- 3.20
Malaysia	7,169	7,213	6,900	2.52	2.24	2.24	- 4.33
Indonesia	3,795	3,860	3,007	1.33	1.20	0.98	- 22.10
Japan	2,023	2,362	2,604	0.71	0.73	0.85	10.27
China	1,513	9,856	1,966	0.53	3.06	0.64	- 80.05
Rest of World	16,575	16,945	14,944	5.83	5.26	4.85	-11.81
World Total	**284,451**	**322,136**	**307,893**	**100.00**	**100.00**	**100.00**	**- 4.42**

Source: GTA

Apple Imports

Apple imports are expected to reach 850MT in 2014/2015 and be at a similar level again for 2015/2016.

New Zealand Import Statistics for Fresh Apples			
Year To Date: January - March			
Partner Country	Quantity (MT)		
	2013	2014	2015
World	177	19	95
United States	176	19	94
New Zealand	0	0	1
India	1	0	0

Source: GTA

New Zealand Import Statistics for Fresh Apples			
Calendar Year: 2012 - 2014			
Partner Country	Quantity (MT)		
	2012	2013	2014
World	1129	873	843
United States	1124	777	822
New Zealand	0	71	21
Australia	5	24	0
India	0	1	0

Source: GTA

Pear Exports and Imports

New Zealand pear exports for the year-to date 2014/2015 have been less than expected and are now only estimated at 4,100 MT, which is 24% below exports the previous year. The hail and storm damage sustained by the Nelson region where most of the pears are grown affected pear production, which has translated through to the export volume available. Looking forward to 2015/2016 it is forecast that the export level will once again return to the 5,000MT mark.

Imports are estimated at 3,700MT for 2014/2015, which is seven percent greater than previously forecast. For 2015/2016 it is forecast imports will be at a similar level of 3,750MT.

New Zealand Export Statistics For Fresh Pears							
Year To Date: January - August							
Partner Country	Quantity			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
United States	1933	2265	1102	41.57	42.72	27.09	- 51.35
Taiwan	594	682	846	12.78	12.86	20.80	24.04
United Kingdom	497	623	644	10.70	11.75	15.82	3.29
Hong Kong	287	293	466	6.17	5.53	11.47	59.10
Canada	218	261	250	4.68	4.93	6.15	- 4.17
Total for EU & Europe	455	519	174	9.79	9.79	4.28	-66.47
China	22	110	151	0.47	2.07	3.71	37.33
Singapore	243	217	121	5.22	4.10	2.97	- 44.31
Fiji	125	90	96	2.69	1.70	2.37	7.05
Malaysia	44	44	56	0.95	0.83	1.37	26.95
Rest of World Sub-Total	231	196	161	4.97	3.70	3.96	-17.86
World Total	**4649**	**5302**	**4067**	**100.00**	**100.00**	**100.00**	**- 23.29**

Source: GTA

New Zealand Export Statistics For Fresh Pears

Calendar Years: 2012 - 2014							
Partner Country	Quantity (MT)			% Share			% Change
	2012	2013	2014	2012	2013	2014	2014/2013
United States	661	1933	2265	22.16	40.95	42.17	17.20
Taiwan	528	594	682	17.69	12.58	12.70	14.82
United Kingdom	528	497	623	17.70	10.54	11.60	25.25
Total for EU & Europe	240	455	519	8.05	9.64	9.66	14.07
Hong Kong	264	287	293	8.84	6.08	5.46	2.20
Canada	79	218	261	2.65	4.61	4.86	19.93
Singapore	206	243	217	6.90	5.14	4.04	- 10.48
Fiji	135	148	116	4.54	3.14	2.16	- 21.62
China	86	22	110	2.90	0.47	2.05	400.00
French Polynesia	48	78	71	1.63	1.65	1.32	- 8.69
Rest of World Sub-Total	208	246	215	6.97	5.21	4.00	-12.60
World Total	**2983**	**4721**	**5372**	**100.00**	**100.00**	**100.00**	**13.80**

Source: GTA

New Zealand Import Statistics for Pears							
Year To Date: January - August							
Partner Country	Quantity			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
Australia	794	854	1235	72.95	79.39	83.49	44.61
United States	181	23	177	16.67	2.14	11.95	666.27
China	87	106	61	7.96	9.86	4.12	- 42.47
Korea South	6	22	6	0.53	2.00	0.41	- 72.15
New Zealand	0	0	0	0.00	0.00	0.03	0.00
American Samoa	0	71	0	0.00	6.61	0.00	- 100.00
Netherlands	21	0	0	1.89	0.00	0.00	0.00
World Total	**1088**	**1076**	**1479**	**100.00**	**100.00**	**100.00**	**37.50**

Source: GTA

New Zealand Import Statistics For Pears			
Calendar Year: 2012 - 2014			
Partner Country	Quantity (MT)		
	2012	2013	2014
Australia	1551	1520	1929
United States	1710	1518	1233
China	403	321	365
Korea South	65	86	100
American Samoa	0	0	71
Netherlands	0	21	0
World Total	**3729**	**3465**	**3699**

Source: GTA