

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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New Zealand

Fresh Deciduous Fruit Annual

Fresh Apple and Pear Production and Trade November 2011

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Report Highlights:

Apple production in 2011/2012 is estimated at 472,400 tons, down about 2% from the 2010/2011 production level. The decline is largely attributed to lower yield stemming from alternation. Pear production is estimated at 15,200 tons, up about 6 percent from the previous year, the increase is attributed to increased area and better yields. MY 2011 apple exports are estimated at 287,000 tons, down 9,000 tons (3%) from the estimated 296,000 tons exported in MY2010.

Executive Summary:

The growing of deciduous fruit in New Zealand is a financially tough business. Total planted area is expected to decline slightly in 2011/2012 and is estimated at 8,880 hectares (ha), with an estimated 8,400 ha planted in apples and 480 ha planted to pears. Total apple production in 2011/2012 is estimated at 472,400 tons, down about 2% from the 2010/2011 production level. The decline is largely attributed to lower yield stemming from alternation. Pear production is estimated at 15,200 tons, up about 6 percent from the previous year, the increase is attributed to increased area and better yields.

Grower returns for the 2010/11 exporting season are estimated at NZ\$20-21/TCE (Tray Carton Equivalent, 18.0 kilograms of fruit), roughly the same level as breakeven costs, hence there is little evidence of profit. Traders attribute the strengthening of the NZ dollar as a leading cause for lower returns for 2010/2011. There exists a wide range in the anticipated returns associated with individual apple varieties, with higher returns reported for deep red, sweet apple varieties (Pacific series, Royal Gala and Fuji) exported to markets in South East Asia, China, Taiwan and India. However, production levels for these varieties are not sufficient to make a difference in the overall profitability realized by the sector.

In line with the decline in production and an anticipated increase in domestic processing volumes, apple exports in 2011/2012 are forecast at 287,000 tons, down about 3% from the estimated 296,000 tons exported in 2010/2011. The trend toward increased exports to the Pacific Rim, SEA, and India at the expense of exports to the E.U. will likely continue.

On the trade policy front, NZ apples gained access to the Australia market following nearly a 100 year absence. Once the fireblight issue (the basis for Australia's ban on imports) was resolved in New Zealand's favor at the WTO, the relevant government authorities got to work and agreed on a protocol for imports. The first shipment of apples crossed the Tasman Sea to Australia on August 19th, 2011. The resumption of trade has not, however, been smooth sailing, with 5 tons of the first 17 tons of consignments destined for export rejected on the grounds of vegetative residue and insects found in the cartons.

Possibly of equal note on the trade policy front, is an agreement between NZ and China on an updated protocol for NZ apples exported to China. The updated protocol (signed September 28, 2011) includes new measures for fireblight control and an improved process for resolution of phyto-sanitary issues, which allows trade access to be maintained while the issue is addressed.

Commodities:

Apples, Fresh

Pears, Fresh

Production, Supply and Demand Data Statistics

Apples, Fresh New Zealand (HA)/(MT)	2009 2009/2010			2010 2010/2011			2011 2011/2012		
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: Oct 2011		
	USDA Official		New Post	USDA Official		New Post	USDA Official		New Post
Area Planted	8,897		8,632	9,061		8,470			8,400
Area Harvested	8,630		8,334	8,850		8,316			8,320
Bearing Trees	0		0	0		0			
Non-Bearing Trees	0		0	0		0			
Total Trees	0		0	0		0			0
Commercial Production	406,633		423,000	460,000		464,740			460,000
Non-Comm. Production	16,000		16,000	16,000		15,000			12,400
Production	422,633		439,000	476,000		479,740			472,400
Imports	1,355		1,349	1,000		1,260			1,600
Total Supply	423,988		440,349	477,000		481,000			474,000
Fresh Dom. Consumption	61,988		60,000	62,000		60,000			60,000
Exports	257,000		258,982	290,000		296,000			287,000
For Processing	105,000		121,367	125,000		125,000			127,000
Withdrawal From Market	0			0		0			
Total Distribution	423,988		440,349	477,000		481,000			474,000
TS=TD			0			0		0	0

Pears, Fresh New Zealand (Ha/MT)	2009 2009/2010			2010 2010/2011			2011 2011/2012		
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: Oct 2011		
	Official Data		New Post Data	Official Data		New Post Data	Official Data		New Post Data
Area Planted	431		431	431		473			480
Area Harvested	431		431	431		473			480
Bearing Trees	0			0					0
Non-Bearing Trees	0			0					0
Total Trees	0		0	0		0			0
Commercial Production	14,000		14,054	14,100		14,100			15,000
Non-Comm. Production	200		200	200		200			200
Production	14,200		14,254	14,300		14,300			15,200
Imports	3,710		3,523	3,500		3,600			3,000
Total Supply	17,910		17,777	17,800		17,900			18,200
Fresh Dom. Consumption	10,334		10,300	10,300		10,400			10,400
Exports	5,076		5,027	5,000		4,400			5,200
For Processing	2,500		2,450	2,500		3,100			2,600
Withdrawal From Market	0		0	0					
Total Distribution	17,910		17,777	17,800		17,900			18,200
TS=TD			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>

Note: Marketing Year 2011 is from Oct 1, 2011 to Sep 30, 2012 and will be referred to as 2011/2012 in the text. Similarly MY 2010 is shown as 2010/11

Note: A TCE stands for Tray Carton Equivalent and is 18.0 kilograms of fruit

Production

Planted Area

2011/2012

Preliminary reports indicate that total apple and pear planted area has stabilized. Total planted area in 2011/12 is forecast at 8,800 ha, a decline of only 63 ha from last year. Over the longer term there is likely to be more pressure for apple tree removal unless grower returns improve, or unless the sector continues to restructure and coalesce around the integrated fruit companies who may lease or purchase orchards to maintain fruit supply to their packing and exporting arms.

2010/11

Post's estimates have been adjusted downward and brought into line with those reported by PipfruitNZs as it has been determined that PipfruitNZ's orchard survey includes total area planted with deciduous fruit trees, and is not (as previously assumed) limited to reporting on area producing for export. Consequently, Post has amended the PSD numbers for planted area and for timing differences as to which planted area refers to the correct PSD crop year.

Table of Deciduous Fruit Plantings in New Zealand by Variety (in Hectares)										
Market Year	MY20 01	MY20 02	MY20 03	MY20 04	MY20 05	MY20 06	MY20 07	MY20 08	MY20 09	MY20 10
Calendar Yr of Harvest	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Braeburn	3,632	3,767	3,901	3,159	2,464	2,484	2,246	2,034	1,869	1,740
Royal Gala	3,749	4,010	4,153	3,393	2,872	2,893	2,669	2,538	2,417	2,423
Cox	557			401	354	314	295	281	248	236
Fuji	1,054	1,094	1,133	1,018	875	836	829	899	931	970
Granny Smith	317			374	322	294	286	282	267	256
Cripps Pink/Pink Lady	241			349	287	248	285	353	397	434
Jazz	127			289	440	576	768	917	977	983
Pacific series	1,713	1,094	1,133	1,521	1,198	929	828	793	814	817
Other Varieties/Unidentified	315	2,184	2,264	257	184	192	333	388	712	611
Total Apple Area	11,705	12,149	12,584	10,761	8,996	8,766	8,539	8,485	8,632	8,470
Pears	965	910	910	936	722	735	412	412	431	473
Total	12,670	13,059	13,494	11,697	9,718	9,501	8,951	8,897	9,063	8,943
Braeburn as % of Apple Area	31.0%	31.0%	31.0%	29.4%	27.4%	28.3%	26.3%	24.0%	21.7%	20.5%
Royal Gala as a % of Apple Area	32.0%	33.0%	33.0%	31.5%	31.9%	33.0%	31.3%	29.9%	28.0%	28.6%

Source: PipfruitNZ

Organic Area

In 2010/2011 the total area in organics was estimated at 947 ha, 11% of total area. Of that, 82 ha was in the transition phase to achieving full organic certification. This was down from the 2009/10 level when a total of 976 ha were recorded as organic. The organic area peaked 2008/09 at 1,004 ha. It has been reported that one of the large integrated apple and pear growing, packing, and exporting companies is going to substantially reduce its organic area. In contrast to the decline in certified organic area, the area planted in the "Apple Futures" program (which aims to achieve nil detectable chemical residues by whatever growing methods are most applicable), now comprises 63% of the total planted area, up from 1% in 2006/2007.

Apple Production

2011/2012

With harvested area being very similar to 2010/11 and at this stage no serious weather concerns, it is envisaged that with a slight down year caused by biennial bearing influences, total apple production will be 472,400 metric tons, down 2% from the previous year.

2010/2011

Apple production for 2010/2011 is estimated at 479,740 tons, up 1% from Post's earlier estimate. This would put the 2010/2011 crop up 9% from the previous year which suffered from hail damage and a biennial bearing down year.

2009/2010

Total production for MY2009 has been revised up to 429,000 metric tons after better background information became available to Post

Pear Production

2010/11

As the increase in planted area starts to reach fruition it is projected that total production will reach 15,200 metric tons, 6% higher than the previous year.

Grower Returns

Apple Prices in NZ\$ per Tray Carton Equivalent(18kg) on a Free Alongside Ship Basis for Marketing Year(FAS-USDA)							
Marketing Year	2003	2004	2005	2006	2007	2008	2009
Variety/Growing Method							
Braeburn- Integrated Fruit Program	15.11	9.81	19.42	16.29	25.09	16.13	18.25
Royal Gala- IFP	16.73	13.87	19.26	19.13	22.16	21.11	22.90
Jazz- IFP	37.39	31.81	34.24	29.57	30.98	19.46	21.59
Granny Smith -IFP	16.69	11.46	19.85	16.48	21.64	19.20	21.68
Cripps Pink/Pink Lady- IFP	27.17	22.72	26.56	25.8	32.12	26.71	21.60
Fuji- IFP	19.98	18.13	27.06	24.01	26.10	25.53	25.71
Pacific Beauty	17.86	17.80	17.02	21.95	23.05	32.47	27.59
Pacific Queen	16.03	17.36	22.26	23.63	26.20	35.19	33.47
Pacific Rose	12.66	16.51	19.42	20.9	25.37	27.29	30.72
Organically grown Braeburn			48.17	30.75	35.14	17.43	25.69
All Organic Apples				32.45	36.03	21.15	27.35
Average All IFP Apples	15.55	12.88	20.02	19.06	24.44	20.52	22.22
Breakeven Costs					23.00	20.35	22.57

Source: PipfruitNZ/MAF

Note: The Breakeven costs includes all on orchard costs, and grading, packing, coolstorage, and freight plus depreciation but no rent or interest costs.

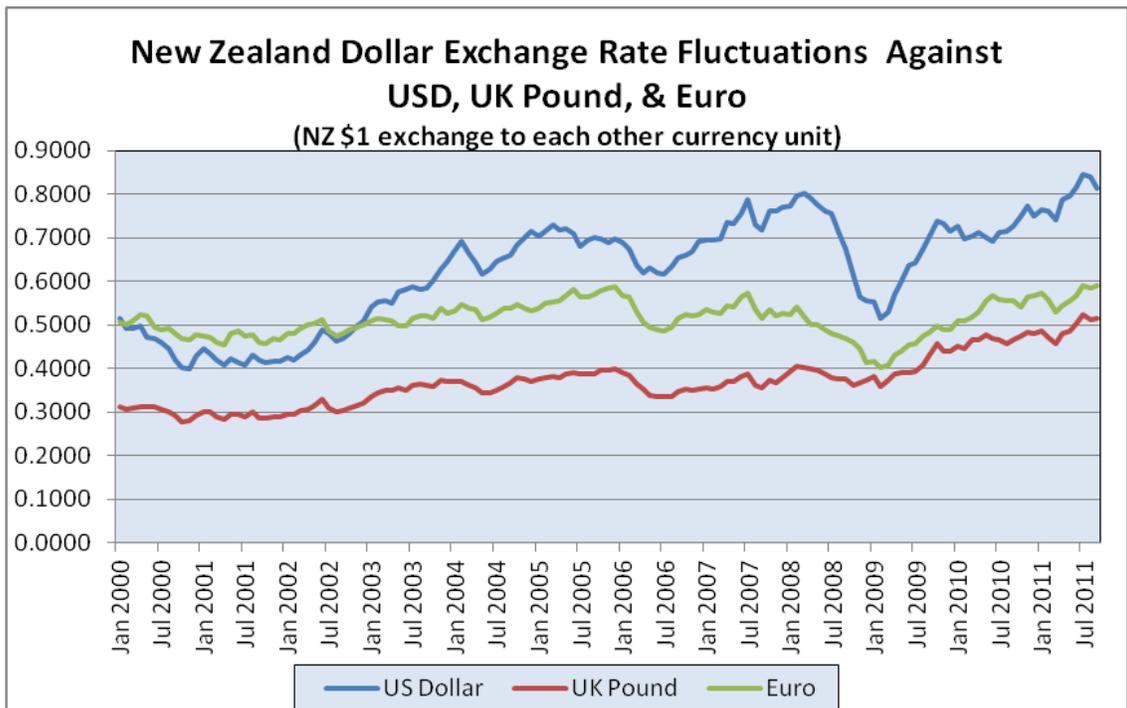
2010/2011

Final grower returns in 2010/2011 are not known yet but anecdotal reports suggest that in-market prices were similar or perhaps a slightly better than the previous export campaign. Final returns are preliminarily estimated at NZ\$20-21/TCE. Again it is likely Braeburn will return a sub-par NZ\$20/TCE average price level. Even more disappointing is the newly introduced Jazz variety which isn't grown in significant quantities anywhere in the world, but will record the 3rd year consecutive year of below cost returns at NZ\$18.50-19/TCE. Growers who spent considerable sums of money redeveloping their orchards planting the Jazz variety are now questioning their judgment. Some growers may lose the support of their bankers especially in the Nelson region. A bright spot this season was the demand for the Pacific series of cultivars which are likely to yield returns in the NZ\$26-31/TCE range. The Pacific series were in strong demand from China and Taiwan.

The MAF Horticultural Monitoring Program forecasts growers' breakeven costs will average NZ\$20.60/TCE which is a 10% reduction from the previous year and may enable growers of varieties in greater demand (e.g., the Pacific series, Fuji, and Royal Gala apples) to realize some profits. It is important to note the savviest of Braeburn growers can get their costs down to around NZ\$15/TCE, and so they would still be making a profit at grower returns of NZ\$18-19/TCE for Braeburn.

Many Nelson orchardists will suffer the third significant financial loss in a row. This has prompted them to start looking at ways to collaborate to improve their prospects. The Regional Economic

Development Agency is helping facilitate any work which may involve growers banding together to export their own fruit.



Source: Reserve Bank of NZ

Consumption

No material change is expected for domestic consumption of either apples or pears in MY 2011 in relation to MY2010.

Trade

Apple Exports

2011/2012

Post estimates MY 2011 apple exports at 287,000 tons, down 9,000 tons (3%) from the estimated 296,000 tons exported in MY2010. This is in line with the forecast for a slight production drop and the anticipated increase in apples diverted to domestic processing.

2010/2011

In response to actual exports of 295,000 tons with only 1 month of the marketing year to go, Post has revised the estimate for MY2010 exports up by 1.4% to 296,000 tons, which is 14% higher than the previous year.

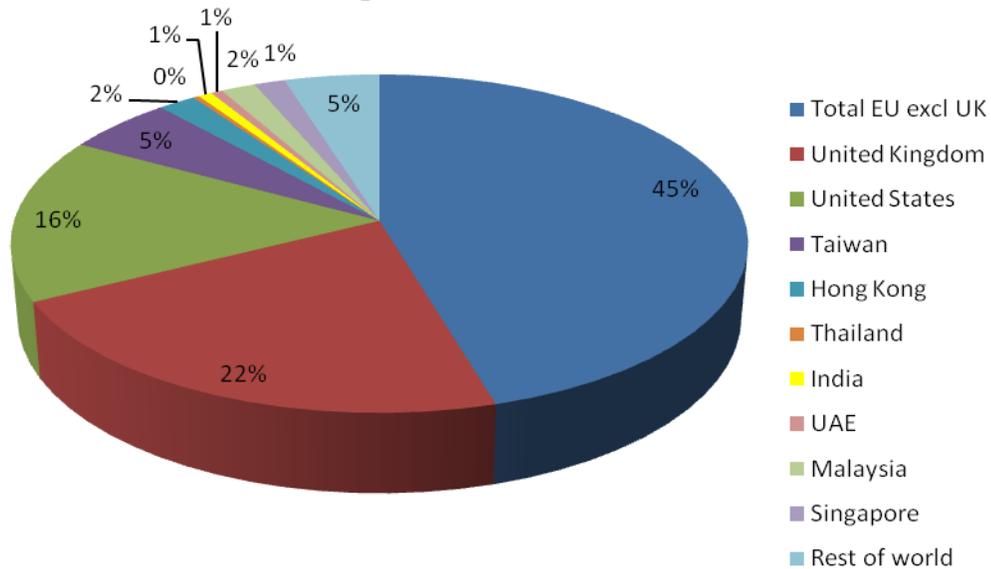
New Zealand Apple Export Statistics

Year Ending Series: August 31, 2001 - 2011

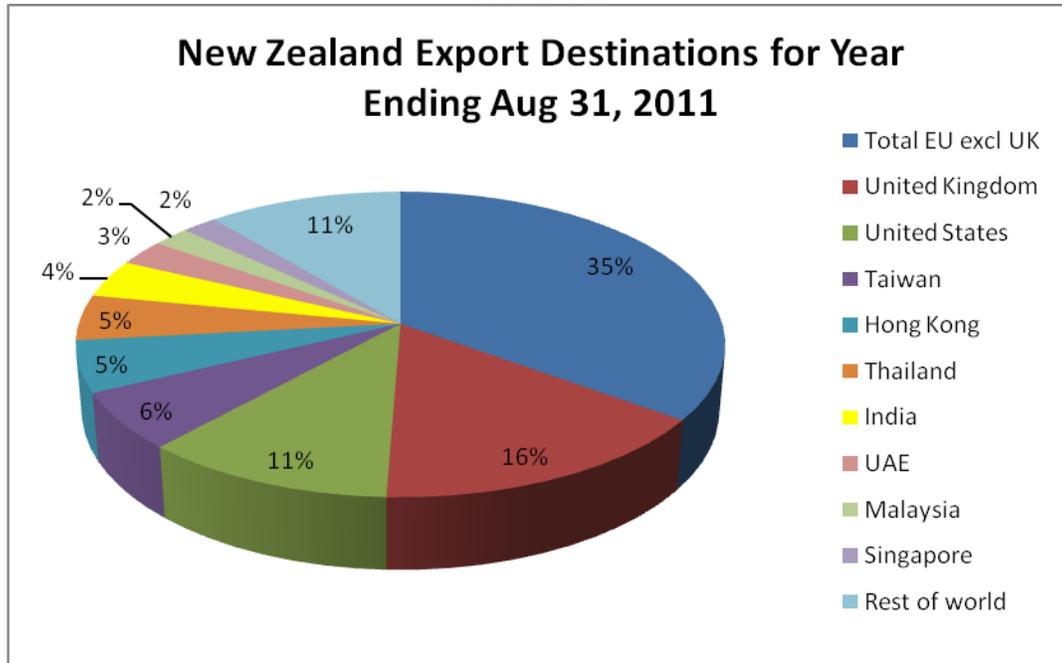
Partner Country	Quantity(metric tons)											Compound rate of change 2001 to 2011
	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	
World Total	262993	318737	321791	358529	318919	265416	291658	261608	302180	257947	297408	1.2%
Total EU excl UK	95699	124444	130598	163219	160886	112240	113494	99134	116452	94619	104357	0.9%
United Kingdom	67067	72728	73591	78453	66059	59146	63111	43526	50286	36150	46149	-3.7%
United States	49647	58445	49158	56376	32413	37517	47700	33028	45484	42260	33107	-4.0%
Taiwan	5660	13818	14434	19340	25825	15204	18263	20598	16349	15756	18133	12.3%
Hong Kong	12626	7699	11121	6782	4794	5583	6323	8179	13351	10760	16157	2.5%
Thailand	2614	2142	3387	1082	840	2219	3035	7539	8844	12317	14314	18.5%
India	1757	2477	2705	2477	2501	3882	3675	4966	5331	5854	11928	21.1%
UAE	1961	3595	1981	2033	2577	2727	4591	6166	8962	7064	8083	15.2%
Malaysia	7183	10431	8252	6229	3645	4493	5350	6997	6894	3468	6277	-1.3%
Singapore	6326	9037	7699	5507	3591	4722	4819	5744	5853	4474	5954	-0.6%
Rest of world	12451	13921	18867	17031	15789	17685	21298	25728	24373	25226	32950	10.2%

Source: Global Trade Atlas & Post

New Zealand Export Destinations for Year Ending August 31, 2004



Source: GTA



Source: GTA

The export matrix detailed in the table above and the snapshots of destination export shares reflected in the pie charts illustrates the gradual shift of industry focus to the Pacific Rim, Asia, and Middle East countries. Several factors are driving this:

- A rapidly growing proportion of the population in Asia and the Middle East with disposable income to spend on, high-quality fruit
- Generally better market prices
- Lower shipping costs and time

The table detailing grower returns for the various apple varieties reveals that varieties destined for the Asian markets (e.g., Fuji, the Pacific series, and now a significant proportion of the Royal Gala crop) are yielding better returns for growers on a sustained basis. The Braeburn and Jazz apple varieties are not well suited to the Asian markets which generally prefer a sweeter apple.

There are constraints and issues with developing new markets in Asia:

- Tariff levels (India especially)
- SPS issues which are more concerned with insect and disease control rather than MRL's in the EU
- Well planned marketing campaigns need to be implemented so as not to collapse any particular market with an oversupply.
- The markets in Asia generally demand a sweet apple with a high red color rather than the russet marking of the Braeburn and its relative the Jazz, which are both tart in taste.
- The cost and risk of growers re-developing orchards over to either new varieties or the Royal Gala

North America

The US continues to be an important market for NZ apples, although for exports through August 31, 2011, shipments were down 22% at 33,107 tons, compared with exports to all destinations up 15% for the same period. Reportedly the US market still demands large fruit sizes, and this year's

pricing has been extremely volatile from week to week. In the long term, traders maintain that a strong US market for a portion of the NZ apple crop will be crucial to maximizing returns.

Australia

The WTO case filed by NZ against Australia (over the perceived threat of fireblight being imported to Australia through imports of NZ apples) was resolved in favor of NZ in late 2010. Work by the respective competent authorities got under way quickly to compile the risk analysis and compliance program. The final importing protocol was issued on August 17, 2010 and by August 19 the first shipment was on its way to Sydney. It is worth noting that New Zealand has exported apples to Taiwan and India for many years, both of which don't have fireblight.

Trade with Australia has, however, not been easy; the protocol establishes very high compliance requirements. By mid-October, 17 tons of fruit had been inspected prior to shipment to Australia, of which 5 tons were rejected. The problems found included vegetative residue in the cartons and the discovery of banned insects. The protocol is similar in its requirements to those for shipments destined for Taiwan. Industry participants maintain that the pack houses will need to regard Australia as having similar requirements and standards as those evident in the most particular of Asian destinations, and adjust their systems accordingly. Growers will likely have to target the Australian market right from the beginning of the growing season and adjust their management practices to suit. In this respect it will be similar to markets such as Taiwan and China which require orchardists to adjust their management right from the onset of the growing season in order to meet phyto-sanitary requirements.

There may be an upside to the stringency of the protocol in that it will naturally limit the volume of fruit shipped to Australia for a couple of seasons and thereby allow a more orderly development of the market by New Zealand exporters.

PipfruitNZ does not anticipate the market for NZ apples in Australia to be much greater than 9,000 tons of fruit in the nearer term. A report commissioned within Australia reported that if NZ apples entered the Australian market, consumption of apples would increase by 17% but prices would fall.

Asia

A highlight for the season was the demand for the Pacific Series in Taiwan and Hong Kong which really took off. Grower returns are likely to be at least as good as last year even with the appreciating exchange rate. Prices could have been even higher but exporters ran out of fruit. NZ is really the only significant producer of the Pacific series and consequently has the market virtually to itself. These apples are more difficult to grow and productivity is lower than the main varieties of Braeburn and Royal Gala.

It is thought that to exploit the promise of the Asian markets more fully, post harvest operators will need to invest more in controlled atmosphere storage facilities. The Asian markets often pay the best prices early in the NZ exporting season and then again late in the season.

India

Despite a tariff of close to 50%, apple exports from NZ to India have grown at a rate of 20% per year over the last 10 years. In fact exports for the year to August 2011 have more than doubled when compared to the previous year. Royal Gala, Red Delicious, and Pacific Queen are the main varieties exported. Promotional activities have involved NZ cricketing greats which resonate well in India where cricket is the national game.

NZ is currently negotiating a Free Trade Agreement with India which could be concluded next year. If a satisfactory tariff reduction schedule for apples from NZ is obtained this will further stimulate the trade and help move the focus of the sector more fully onto Asia.

Europe / Braeburn Exporters Group

The Braeburn exporters group is a voluntary grouping which meets on a regular basis to share market data and discuss strategy. They have also engaged a skilled marketer who has directed the limited marketing budget to an interactive website and a social media campaign (see: <http://www.applesfromnz.com/#/About-us>). Promotional activities have involved leaving cartons of NZ apples in London parks with flyers directing the public who have tasted the apples to the website.

It is not known at this stage whether the Exporters group has had a positive effect on grower returns this season. The European market for Braeburn was more stable this year and the hard issues around volume control when the market is falling haven't surfaced this year.

The big problem faced by Braeburn producers is really that they are being displaced by the Jazz and Cripps Pink volumes from NZ and elsewhere.

New Zealand Export Destination Statistics For Fresh Apples								
Market Year Ending: September, 2005 - 2010							% change 2010 over 2009	Share of Exports in 2010
Partner Country	Quantity (metric tons)							
	2005	2006	2007	2008	2009	2010		
Total EU excl UK	160886	112240	113494	99134	116452	94619	-18.7%	36.5%
United States	32455	37578	47669	32958	45678	42108	-7.8%	16.3%
United Kingdom	66059	59181	63076	43526	50286	36297	-27.8%	14.0%
Taiwan	25762	15204	18283	20599	16450	15634	-5.0%	6.0%
Thailand	840	2219	3160	7435	9085	12860	41.6%	5.0%
Hong Kong	4769	5583	6341	8160	13454	10935	-18.7%	4.2%
United Arab Emirates	2577	2727	4591	6166	8962	7148	-20.2%	2.8%
India	2522	3861	3675	4966	5331	6058	13.6%	2.3%
Canada	4135	4951	6177	5613	4770	5810	21.8%	2.2%
Singapore	3637	4680	4824	5736	5894	4517	-23.4%	1.7%
All Other Destinations	15213	17317	20730	26861	26654	22996	-13.7%	8.9%
World Total	318855	265541	292020	261154	303016	258982	-14.5%	100.0%

Source: Global Trade Atlas

Apple Imports

New Zealand Import Statistics								
Commodity: 080810, Apples, Fresh								
Year Ending Series: August 31, 2006 - 2011								
Partner Country	Unit	Quantity						% share
		2006	2007	2008	2009	2010	2011	2011
World	T	1235	1102	1572	1654	1353	1257	
United States	T	1169	1082	1572	1613	1217	1240	98.6%
New Zealand	T	64	0	0	41	125	17	1.4%
Australia	T	1	0	0	0	0	0	0.0%
Canada	T	0	20	0	0	0	0	0.0%
China	T	0	0	0	0	11	0	0.0%
India	T	1	0	0	0	0	0	0.0%
United Kingdom	T	0	0	0	0	0	0	0.0%

Source: Global Trade Atlas

Pear Exports

A total production increase and a return to a normal export packout should see pear exports rebound to 5,200 tons in MY 2011 up from an estimated 4,400 tons in MY 2010.

Pear Imports

New Zealand Import Statistics								
Commodity: 080820, Pears And Quinces, Fresh								
Year Ending Series: August 31, 2006 - 2011								
Partner Country	Unit	Quantity						% share
		2006	2007	2008	2009	2010	2011	2011
World	T	3880	3161	3089	3520	3505	3545	
United States	T	1212	1362	1127	1223	1340	1689	47.6%
Australia	T	1493	1200	1145	1530	1677	1233	34.8%
China	T	993	507	674	593	300	506	14.3%
Korea South	T	161	92	143	174	162	117	3.3%
Canada	T	21	0	0	0	0	0	0.0%
New Zealand	T	0	0	0	0	4	0	0.0%
South Africa	T	0	0	0	0	22	0	0.0%

Source: Global Trade Atlas

Policy

China

New Zealand has finally managed to negotiate a more suitable export protocol with the Chinese mainland for apples. Once New Zealand's WTO case with Australia was concluded a new protocol for fireblight risk was agreed to with China along with a change in stance in terms of China's response if one of the quarantine list of pests is found in a shipment. Agreement was reached on the protocol in February 2011 and signed September 28, 2011.

The protocol is similar to the one with Taiwan. The risk of fireblight is controlled by the Integrated Pest Management strategy adopted by growers, and MAF certify the fruit is free of fireblight. In regard to other pests and diseases on China's quarantine pest list such as Woolley Apple Aphid, Scab, Apple leaf Curling Midge, and San Jose scab; if a pest is found in a particular shipment rather than the draconian step of banning all further shipments a problem solving pathway will be adopted so as to maintain trade.

Access directly to the mainland rather than via the grey trade with Hong Kong will extend the reach of apple exports from New Zealand and open up new regional markets such as Shanghai. It will save exporters approximately NZ\$2.00-3.00/TCE of additional trans shipping costs. Direct shipments to Chinese mainland ports could reach 10,000 to 20,000 tons in a matter of four to six years.

Japan

In mid 2010 Japanese authorities came to an agreement with MAF over a protocol for apple imports that would allay Japanese fears of fireblight. Shipments of apples are fumigated with methyl bromide in NZ and held for 22 days in cold storage before shipping. Rather than have a Japanese official oversee the whole process, a Japanese inspector will now audit the system once a year. It's too early to tell whether these changes will be enough to stimulate a growth in shipments to this market above the 140 tons shipped in the last 12 months.

Free Trade Agreements

The following agreements are in force:

- [New Zealand-Hong Kong, China Closer Economic Partnership](#) (NZ-HK CEP entered into force on 1 January 2011)
- [New Zealand-Malaysia Free Trade Agreement](#) (MNZFTA entered into force on 1 August 2010)
- [ASEAN-Australia-New Zealand Free Trade Agreement](#) (AANZFTA) - 2010
- [New Zealand-China Free Trade Agreement](#) (NZ-China FTA) - 2008
- [Trans-Pacific Strategic Economic Partnership](#) (P4) - 2005
- [New Zealand-Thailand Closer Economic Partnership](#) (NZTCEP) - 2005
- [New Zealand-Singapore Closer Economic Partnership](#) (NZSCEP) - 2001
- [Australia-New Zealand Closer Economic Relationship](#) (CER) - 1983

In addition, the New Zealand Government is currently negotiating the following FTAs:

- [New Zealand-Gulf Cooperation Council Free Trade Agreement](#) (NZ-GCC FTA negotiations have been concluded but not yet signed)
- Expansion of the [Trans-Pacific Strategic Economic Partnership](#) (TPP)
- [New Zealand-Korea Free Trade Agreement](#) (NZ-Korea FTA)

- [New Zealand-India Free Trade Agreement](#) (NZ-India FTA)
- [New Zealand-Russia-Belarus-Kazakhstan Free Trade Agreement](#) (NZ-RBK)

While exporters report that FTAs do not drive business decisions, they do provide a framework to work out trade-related issues, especially SPS and non-tariff barriers, and, in some cases, significant market access advantages.

Also announced negotiations are beginning with Taiwan

Industry Developments

Industry News

A majority stake in the largest post harvest operator, processor and exporter, Turners and Growers (T&G) which owns ENZA and exports somewhere around 20% of the apple crop is up for sale. ENZA owns the Jazz and Envy varieties and is the largest juicing processor. Depending on how this stake is sold it could set the scene for structural changes within the sector.