



ZESPRI AND THE KIWIFRUIT INDUSTRY

Make your healthy irresistible

OUR INDUSTRY



ZESPRI BY THE NUMBERS / Single Desk

Zespri is the world's leading kiwifruit brand and is **100% GROWER-OWNED**



97% OF GROWERS CONTINUE TO SUPPORT THE SINGLE DESK

A GLOBAL TEAM OF **776 people**

2,820 growers in New Zealand and 1,441 international growers



We're set-up this way because

GROWERS, FACED WITH CONSIDERABLE ADVERSITY,



decided they could do **BETTER TOGETHER**

NZKMB - 1988 | Zespri - 1997

NZ PRODUCING HECTARES
13,610 HECTARES IN 2021/2022



NZD \$4.03 BILLION IN 2021 /2022
\$4.5 BILLION IN SALES BY 2025

NZ'S LARGEST horticulture export

AVERAGE NZ ORCHARD SIZE
[PRODUCING AREA AVERAGES]:

ZESPRI GREEN KIWIFRUIT - **3.3HA**

ZESPRI SUNGOLD KIWIFRUIT - **3.8HA**

TOP 5

FRUIT BRAND

in our major markets



ZESPRI HELPS PEOPLE, COMMUNITIES, AND THE ENVIRONMENT AROUND THE WORLD THRIVE THROUGH THE GOODNESS OF KIWIFRUIT



WE COMMIT TO
guardianship



WE ARE
results-driven



WE CULTIVATE
personal connections

GLOBAL BRAND



Production in 5 countries

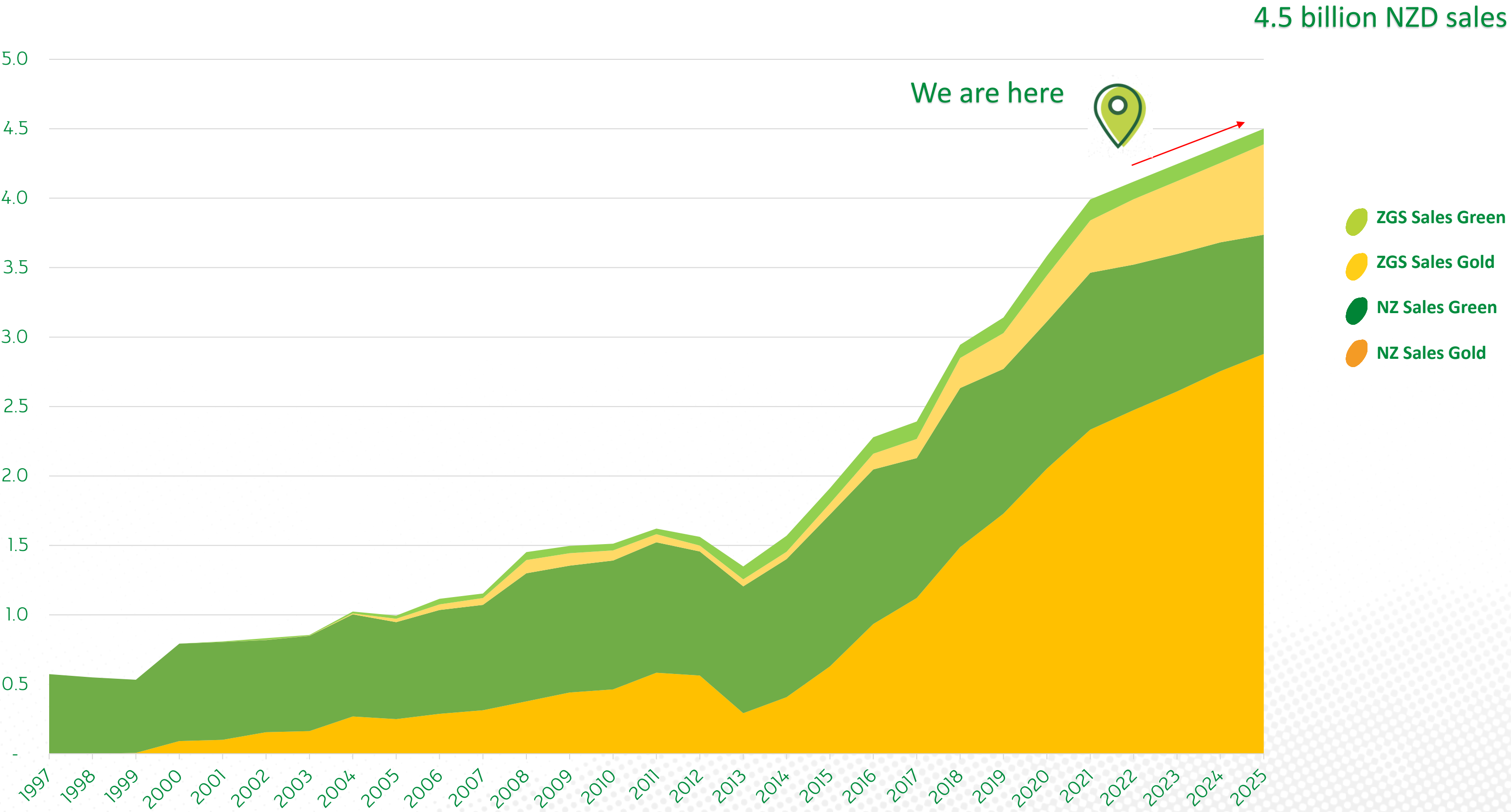


Offices in 17 countries



Sales in more than 50 countries

FUTURE GLOBAL REVENUE



STRATEGY – 12 MONTH SUPPLY

Zespri Global Supply

GLOBAL SUPPLY STATISTICS 2021/2022

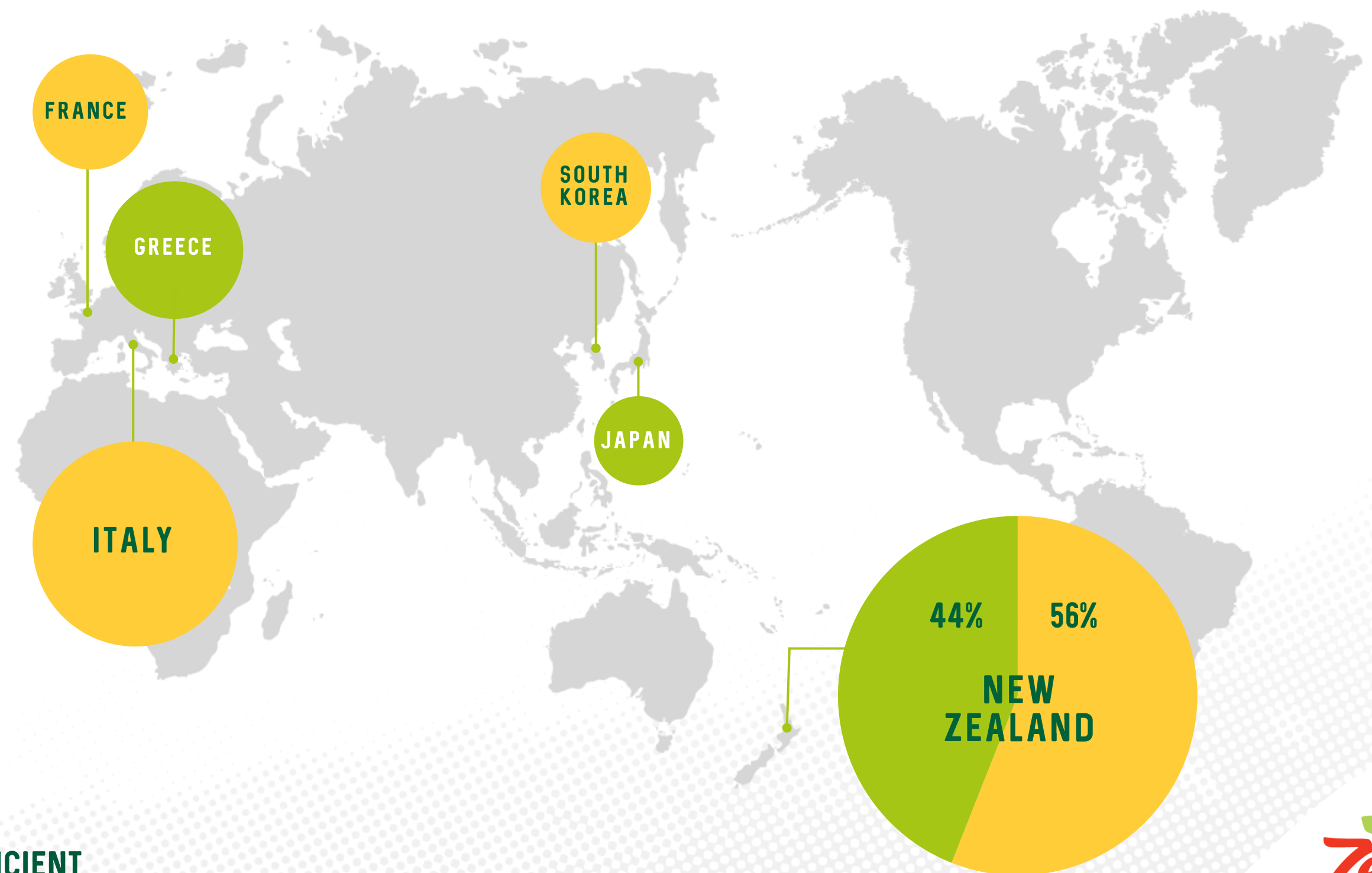
 ZGS Gold
 ZGS Green

ITALY - 2713 HA

FRANCE - 333 HA

SOUTH KOREA - 115 HA

JAPAN - 83 HA



BENEFITS

- ☀ GREATER RETURNS TO GROWERS
- ☀ SHARING OF EXPERTISE
- ☀ COOPERATION ON R&D AND TECH TRANSFER
- ☀ JOBS AND OPPORTUNITIES
- ☀ INVESTMENT
- ☀ MAKES US MEMBERS OF THOSE COMMUNITIES
- ☀ MAKES BRAND AND MARKETING SPEND MORE EFFICIENT

WHY ZGS IS IMPORTANT



Supply of Zespri Kiwifruit varies by market and by season.



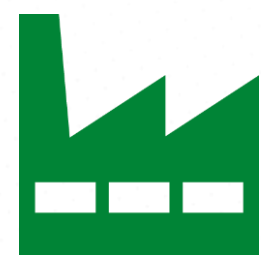
ITALY SUNGOLD KIWIFRUIT 2021/22



1039 KPINs
(899 producing)



3 Nurseries



4 SunGold Kiwifruit Partners

Based in Emilia Romagna

- Salvi
- Agrientesa
- Apofruit
- Spreafico

Based in Campania

- Salvi Eboli



Hectares

3,447 planted
2,720 producing (79%)

Crop Volume

- 14 mil TE total class 1

Shipped Volume

- 65% Europe
- 12.4% China
- US – 5.6%
- ROW – 17.4%

2021/22 Challenges

- KVDS
- BMSB
- Frost
- Covid

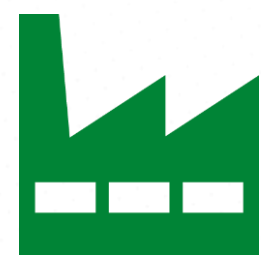
FRANCE SUNGOLD KIWIFRUIT 2021/22



110 KPINs
(95 producing)

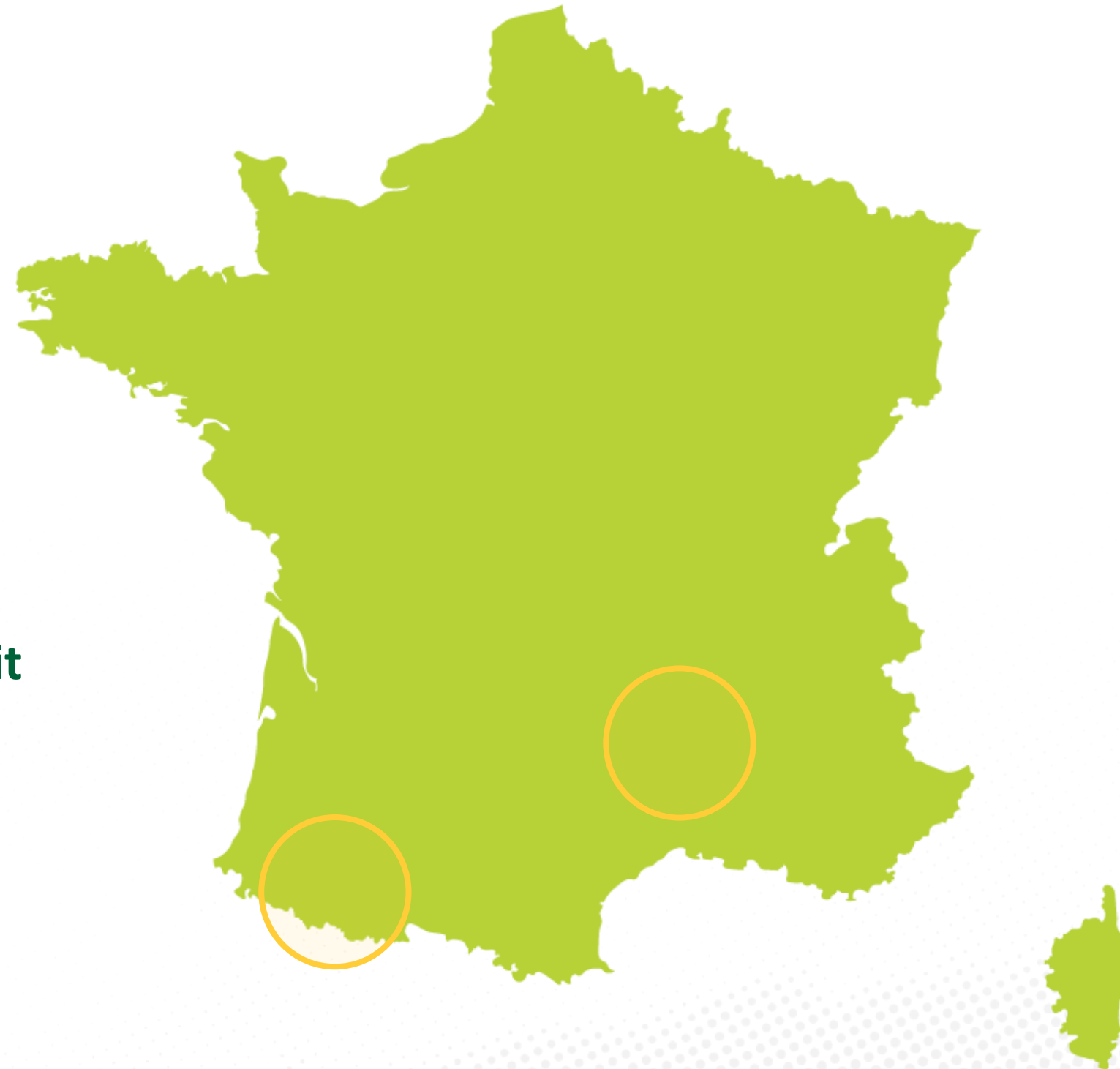


1 Nursery



3 SunGold Kiwifruit Partners

- Sikig
- Sanz
- Blue Whale



Hectares

- 400 planted,
- 335 producing (84%)

Crop Volume

- 1.2m total TE class 1

Shipped Volume

- 99% Europe
- 1% Vietnam

2021/22 season

- COVID
- Frost

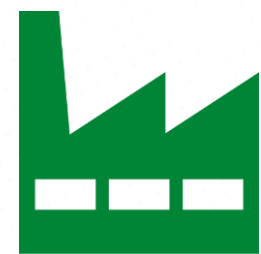
JAPAN GOLD KIWIFRUIT 2021/22



241 KPINs
(190 producing)



3 Nurseries
Capacity per year
• Plants 50k total



2 SunGold Kiwifruit packhouses
• Kamagumi Kaashi (Fukuoka)
• Toyo Engei (Ehime)



Hectares

148 SunGold planted
30 ha Hort16a planted

58 ha SunGold producing (39%)
25 Hort16a producing

Crop Volume

• 369k TE Class 1 (combined Gold)

100% of volume sold within Japan (no export)

2021/22 Challenges

• Fruit quality

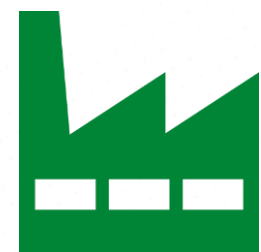
KOREA GOLD KIWIFRUIT 2021/22



357 KPINs
(185 producing)



2 Nurseries



3 SunGold Kiwifruit Packhouses

- KKMCC (Mainland)
- GA (Jeju Island)
- GC (Jeju Island)



Hectares

- 212 ha SunGold planted, 95ha producing (45%)

Crop Volume

- 410k total class 1 Sungold
- 78k total class 1 Hort 16a

100% of volume sold in Korea (no export)

REGULATIONS

A producer vote approved ZGS activities in 2019, enabling Zespri to continue our 12-month supply.

APPROVED ZGS ACTIVITIES INCLUDE

- Use in overseas countries of plant varieties of kiwifruit owned by Zespri
- Managing growing practices by overseas growers
- Managing the supply chain from overseas growers to market
- Marketing and market development for fruit grown overseas

THRESHOLDS

- 5,000 ha of SunGold Kiwifruit planted offshore (50 million trays) managing growing practices by overseas growers
- 20 million trays of Green procured
- 1,000 ha of any new variety

ANY CHANGES TO THESE ACTIVITIES, INCLUDING INCREASES TO THE APPROVED THRESHOLDS, WILL REQUIRE ANOTHER PRODUCER VOTE. IT IS INTENDED THAT THE CURRENT EXCLUSION OF ZGS ACTIVITIES IN CHINA AND CHILE WILL CONTINUE.

THE *Journey* AND LESSONS LEARNT

- Build trust
- Be Consistent
- Use translators
- Create Partnership agreements



QUESTIONS

