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# NEW ZEALAND APPLES AND PEARS

*Strategy to 2035*

FINAL REPORT



New Zealand Apples and Pears  
Strategy 2023 to 2035

# Introduction

The purpose of this strategy is to support and enable the growth and profitability of our New Zealand apples and pears industry. It calls out a clear industry ambition to recover from recent challenges, and to prosper over the next 10-12 years. This ambition is supported by a set of strategic priorities and core services where the NZAPI Board and staff will focus our efforts in our role as the supporting industry body.

We will not achieve this alone. Key to our success will be partnership and collaboration with others across the wider horticulture sector, with government and with iwi/Māori, as well as with each other.

Our strategy is practical and implementable, but it is the what, and not the how. It will be supported by a comprehensive and phased implementation plan which sets out how our strategy will be delivered. This plan will be sized and paced to match available resource, and be clear on agreements with stakeholders and other industry bodies about how we will work together. The plan will be advanced through our annual business plans, and monitored against specific measures. Even with this implementation plan, there will be times when we need to respond to unexpected events and challenges, or should take up new opportunities. In such instances, the NZAPI Board will make intentional decisions to re-prioritise the plan, and communicate this to members.

Whilst our strategic direction is clear, it is also based on what we know now. This strategy is therefore a live document. The NZAPI Board will work with members to review and refresh this strategy every three years to adjust to any changes in context, and to incorporate learnings from our experience. In this way, we will continue to make choices that best deliver the long-term ambition of our industry as we progress through the period of this strategy.

**Lesley Wilson**  
Chair NZAPI

Our strategy is set out in the following sections:

- Our **strategic context**, which identifies the trends and critical uncertainties for our industry that will influence what NZAPI does, or might need to do, and translates this into a view of where we need to position ourselves for the future. This position is then captured in a statement of our industry ambition, and a refreshed purpose and role for NZAPI to support industry success.
- A set of **strategic priorities** that NZAPI will drive to achieve our industry ambition, in the context of the sector and communities we operate in
- Our approach to **strategy implementation**, balancing the need for a short term recovery with three horizons of growth, and
- Areas of **performance measurement** to monitor and report on progress, and inform decisions about adjustments and reprioritisation as our context evolves

# Our strategic context

## NEW ZEALAND APPLES AND PEARS INDUSTRY

The New Zealand apples and pears industry includes people across the apple and pear value chain, from workers on orchards, to exporters. We are a Tier 1 horticulture industry and rely heavily on export market access.

Our industry is diverse, encompassing large, vertically integrated corporates at one end of the spectrum, to small, independent, family run orchards at the other end. Interests and needs vary across the diverse grower groups.

The apples and pears industry is spread across regions of New Zealand. The main regions include Hawke's Bay, Tairāwhiti, Wairarapa, Nelson, and Central Otago, and Timaru. The largest region is Hawke's Bay, where 65% of apples and pears are grown. Regional differences such as climate and location influence the cost of production and growing conditions.

NZAPI is funded from member levies. Commercial entities also pay levies for each product group they grow, which for NZAPI is based on kilograms. They also pay a levy to Horticulture New Zealand (HortNZ), which is based on value of product.

## NEW ZEALAND APPLES AND PEARS INDUSTRY BODY

New Zealand Apples and Pears Inc (NZAPI) is the apples and pears industry body, providing programmes and essential systems that support members to maintain and grow market access, manage biosecurity risks, and build a skilled workforce, and advocating for members with central and local government.

Approximately 80% of the time and effort of NZAPI staff is spent delivering services to our members, which are summarised in the table below. These services are core NZAPI activities that may be refined over the course of the strategy period, but will be retained as a key enabler for industry.

### NZAPI core services for members

#### Advocacy and representation – Engage at national and local level to represent interests of members by:

- ❖ Public communications and government relations
- ❖ Representation on committees, advisory groups and working groups
- ❖ Written submissions, reports, strategy and letters
- ❖ Hosting and facilitating delegations and forums
- ❖ Cross sector and organisation collaboration

#### Market access - Industry support and services to meet requirements by:

- ❖ Interpretation and provision of tools and updates to meet phytosanitary and residue requirements
- ❖ Manage assurance and export programmes and eligibility systems and tools
- ❖ Manage industry registrations and data for audits and export
- ❖ Crop protection and weather tools to manage spray programmes and export clearance
- ❖ Interpret and provide guidelines and templates for food safety, Global GAP and other assurance programmes, and sustainability
- ❖ Respond and resolve issue to eligibility and requirements
- ❖ Advocacy and technical support to government to open new and maintain existing markets

#### Biosecurity - Ensure industry are prepared and respond by:

- ❖ Developing response plans
- ❖ Interpreting and developing technical information and guidance
- ❖ Engaging with government to assess and manage risk
- ❖ Advocacy and technical advice to government
- ❖ Understanding and monitoring emerging risks

#### Workforce - Ensure industry have access to a skilled workforce by:

- ❖ Advocacy with government
- ❖ Relationships with Pacific partners
- ❖ Operationalise access to RSE
- ❖ Support for RSE employers
- ❖ Support young grower and career events and programmes
- ❖ Upskill through training and extension

#### Engagement and extension - Ensure industry have knowledge and information by:

- ❖ Hosting and coordinating an annual conference
- ❖ External media and newsletters
- ❖ Providing and managing tools and resources on our website
- ❖ Developing and distributing reports, best practice guidelines, posters, charts and literature
- ❖ Running field days, workshops, seminars and skill up events
- ❖ Updating and managing online tools

#### Research and development – Ensure strategic priorities are supported by:

- ❖ Engaging with industry and stakeholders to align projects with industry priorities
- ❖ Seek and manage funding to undertake projects
- ❖ Day to day project management of finance, milestones, reporting and contracting
- ❖ Contract management and delivery
- ❖ Undertake tech transfer activities to implement within industry programmes

#### Corporate services – Ensure functioning of the incorporation by:

- ❖ Implementation and management of governance processes
- ❖ Risk and crisis management
- ❖ Financial, auditing, risk, policy and contract management
- ❖ Coordination of board meetings, committees, actions and AGM

## OUR PARTNERSHIPS

NZAPI operates in a broad and complex stakeholder landscape, where partnership and collaboration are key.

### Horticulture New Zealand

HortNZ is an overarching industry body, including 20 plus different horticulture product groups (including NZAPI), along with district associations.

HortNZ released a cross sector action plan in February 2023, 'Growing Together 2035, Aotearoa Horticulture Action Plan'. NZAPI contributed to the development of this document, and HortNZ leads its implementation.

The horticulture sector action plan outcome areas are:

- **Grow sustainably** - improving sustainability and mitigating climate change
- **Optimise value** – domestic and export market and consumer needs are understood, data is well utilised, and the value chain is optimised for demand
- **Māori are strong in horticulture** – Māori participation in high-value horticulture triples by 2035
- **Underpinned by science and knowledge** – a strong research and development programme and consideration of Mātauranga Māori enables, accelerates and supports horticulture
- **Nurture people** – horticulture attracts, retains and grows great people

### Industry product groups

There are 20 plus product groups across horticulture. Several smaller and medium sized apples and pears growers also grow varieties from other product groups that sit within the HortNZ umbrella, and also pay levies to these other product groups.

Some industry product groups, at the executive level, are considering how to work more closely with each other to reduce duplication, and potentially consolidate where appropriate. This would have the benefit of reducing duplication and levies commercial entities must pay, but needs to be managed so that it does not reduce the ability for product groups to retain their own voice to advocate for product specific outcomes.

### Government

Government policy design and implementation plays a significant role within the New Zealand apple and pear industry, and are important partners in supporting our industry to understand geo-political risks that may impact on our markets. NZAPI and HortNZ assist local and central government with policy design, and advocate to government on behalf of industry in the following areas:

- **MPI** – sets the regulatory environment that our industry must navigate and comply with, which influences industry pest management, chemical spray programmes and export assurance requirements. The market access team within MPI also works with industry and provides information on risks.
- **Immigration NZ/MBIE** – Immigration NZ (a department of MBIE) own the RSE scheme and the policy.

- **MFAT** – works with MPI and industry on market access and risks, negotiates trade deals (including FTAs) and provide funding to Immigration NZ to manage the RSE programme in the Pacific and at a national level.
- **MSD** – involved in regional governance groups and initiatives to support New Zealanders into work in the industry. Assesses the availability of local New Zealand labour, ensuring that the recruitment of overseas workers under the RSE scheme is aligned with national labour supply priorities.
- **Local government** – agree how land and water should be used, interpret national policy statements at a regional level, such as buildings and sub-divisions, and set region specific environmental limits and targets.
- **Educational institutions**—apprenticeship and training providers can support the industry by training a full-time (non-seasonal) horticulture workforce.

### Transport industry and infrastructure

Transport infrastructure and industries providing materials are important support mechanisms for our industry. Access to ports and roads are vital to access our markets, and the ready availability of materials are important across our supply chain.

### Iwi/Māori

Settled iwi are investing in horticulture and are taking a keen interest in growth opportunities that will benefit iwi, hapū and whānau.

Iwi play an important role in the regions to determine sustainable natural resource use. In the early period of this strategy, water sustainability and management is an increasingly prominent feature of discussions between local government, Treaty Partners, and industry.

There is an opportunity for industry to develop stronger relationships and partner with iwi and work together to achieve mutually beneficial outcomes.

## OUR INDUSTRY OPERATING ENVIRONMENT

NZAPI has worked closely with our industry to identify the key challenges and opportunities in our industry operating environment.

### In the near term, there is a need for recovery and a return to profitability

We believe that horticulture will play an increasingly important role in New Zealand's economy over the next decade. However, we should not underestimate the critical importance of near-term challenges for our industry. Profitability has reduced over recent years, largely through increased costs of production across the whole supply chain and exacerbated by one-off weather events. There is a need to focus on securing changes that will make our industry more competitive in the international market. This includes:

- Increasing our ability to identify and respond to volatility in our markets from geo-political trends and events
- Defending our markets in the face of in-market recessing factors
- Securing government policy settings which reduce compliance costs

- Protecting New Zealand’s international market by delivering high quality products that comply with market access requirements, and harness the advantage we have in New Zealand of our relative protection from climate change impacts compared with our competitors overseas. We need to ensure appropriate crop protection options are available and assess any market access risks
- Address changes to the RSE scheme to ensure viability and sustainability for industry and our Pacific Partners
- Increasing our preparedness to respond to unexpected crises

### **Over the medium term, there is a need to address enduring and emerging challenges**

- Protecting our social licence and meeting changing market access requirements by becoming more sustainable and reducing our environmental footprint
- Technological developments of our overseas competitors mean we are losing our market advantage of seasonality and varieties. This increases competition in our targeted markets. In response, we need to use technology and harness innovation to support good practice across our supply chain which reduce the costs of production and improve productivity. Influencing government policy will be key to this shift
- There are potential changes to the risk profile of international threats to our border, and changes to the nature of pests and diseases due to climate change and the changing demographic of our visitors
- The challenge of attracting people to the industry, securing a skilled permanent and seasonal workforce, and retaining our workforce with opportunities to grow and develop
- Access to water and natural resources is a growing risk, and there is production pressure on available land. Industry will need to use natural resources in a more sustainable way, and collaborate with wider industry bodies and with communities to find solutions

## WHAT THIS MEANS FOR OUR FUTURE

The intent of our strategy is to focus NZAPI’s efforts to address the challenges in our strategic context, and to harness the opportunities it presents. Commercial decisions are for our members to make, and are not part of this strategy. Rather, our strategy focuses on priorities for NZAPI in our role to support and enable our industry.

Over the next two pages we have:

- captured this intent in a statement of our industry ambition to 2035, and in a refreshed purpose and role for NZAPI.
- set out NZAPI’s approach to support our industry ambition. This is captured in an outcomes framework which graphically represents the relationship between inputs, impacts and outcomes



## OUR INDUSTRY AMBITION TO 2035

**We are a thriving \$2 billion industry, valued by our customers, consumers, and partners for our trusted, world class produce. Our members' success sustains and strengthens our regional economies and communities, making a vital contribution to the prosperity of Aotearoa New Zealand**

We will achieve our ambition over two overlapping phases:

- Over the short-term, a tactical period of recovery, and of restoring profitability
- Over the strategy period, a growth plan with measured progress

## THE PURPOSE AND ROLE OF NZAPI AS THE INDUSTRY BODY

**We present the vision and provide the voice for the Aotearoa New Zealand apples and pears industry, enabling our members to prosper**

Collaborating with the wider horticultural industry bodies, we:

- support our diverse members to thrive economically, through programmes and services that:
  - maintain and grow market access
  - manage biosecurity risk and prepare industry for incursions
  - secure a skilled workforce
  - support member profitability through improved productivity
- advocate for our industry, ensuring the needs and priorities of our members are heard loud and clear by government
- prepare our industry to be future-fit in response to a changing world

## Our outcomes framework

BY 2035 WE  
WILL BE

**—a thriving \$2 billion industry, valued by our customers, consumers, and partners for our trusted, world class produce. Our growers' success sustains and strengthens our regional economies and communities, making a vital contribution to the prosperity of Aotearoa New Zealand.**

### OUTCOMES



### IMPACTS



INDUSTRY  
SUPPORT AND  
ENABLERS

***We present the vision and provide the voice for the Aotearoa New Zealand apples and pears industry, enabling our members to prosper***



## Our strategic priorities

We will focus the efforts of NZAPI as our industry body through five strategic priorities which capture the outcomes industry seeks. Each strategic priority is critical to industry success. Taken together, they set out an ambitious but practical approach to deliver our industry ambition.

<b>Sell</b>	<b>Market access</b>	Our markets are secure and profitable, and access is meaningful
<b>Defend</b>	<b>Biosecurity</b>	We are resilient to biosecurity threats and incursions
<b>Do</b>	<b>Workforce</b>	We have access to the right workforce at the right time
<b>Care</b>	<b>Environment</b>	We use natural resources sustainably, and minimize our environmental impact
<b>Knowledge and communication</b>	<b>Enabling and supporting industry ambition</b>	We have the services and the voice we need to prosper, underpinned by research and development.

For each strategic priority we set out:

<b>Why does this matter?</b>	This section provides an overview of the external environment in which our industry operates, and the importance of the strategic priority in this context
<b>What does success look like for industry in 2035?</b>	This section sets out the benefits the strategic priority will deliver for NZAPI members, in support of our industry ambition
<b>Key shifts to deliver success</b>	<p>This section sets out the critical areas of focus under the strategic priority that NZAPI will drive. Sometimes the shifts are a new areas of focus for NZAPI, and sometimes they are an established areas of focus that NZAPI will strengthen.</p> <p>NZAPI will not deliver these shifts alone. Partnering with others will be key to success, and NZAPI's role will sometimes be to lead, and at other times to participate or observe. NZAPI will collaborate in particular with the wider horticulture industry, with government, and with iwi/Māori.</p>
<b>How NZAPI will support and enable our industry</b>	This section sets out the key activities that NZAPI will undertake within the strategic priority to support and enable industry success.

Many of the shifts called out in these strategic priorities will be achieved through collaborating with others. Where this includes HortNZ and other horticultural product groups, we refer to these organisations as “wider industry”.

We will not do everything at once. Our strategy will be implemented in phases, to balance immediate needs and capacity to deliver NZAPI's core services with long term opportunities and growth.

## STRATEGIC PRIORITY - MARKET ACCESS

### Our markets are secure and profitable, and access is meaningful

This priority is about being clear about the current markets we want to defend, the new markets we want to enter, and making informed choices about our market access priorities. The intent is to have access to a diversified market, which secures resilience and growth. It is also about reducing tariff and non-tariff barriers, and reducing the burden of compliance with market requirements.

<p>Why does this matter?</p>	<ul style="list-style-type: none"> <li>Defending current markets and unlocking new markets is critical to the success of our industry, and our opportunity for significant growth</li> <li>International trade conditions are changing, including increased geopolitical volatility, and stringent market requirements. Rules based trading is shifting to relationship-based trading. We are trading on security as well as economics, and need fresh approaches to market access which adapt to this new context</li> <li>By having a clear view of our current and target markets – who we export to, their needs and requirements – and of future trends, we can focus our energies on building and defending our unique competitive advantage against global competition</li> </ul>
<p>What does success look like for industry in 2035?</p>	<p><b>Security of market access</b></p> <ul style="list-style-type: none"> <li>We have access to a diversified overseas market, optimally balanced across high-paying but high-risk markets, markets with more stability, emerging growth markets, and markets with low competition</li> <li>We have the knowledge and agility to effectively react to unforeseen market challenges and to withstand market volatility from geo-political trends and events</li> <li>We understand the current and targeted market access options, this supports us to make informed decisions about where to prioritise gaining or defending market access for New Zealand</li> <li>We leverage off New Zealand’s trusted reputation internationally, our relative security, our relative protection from climate change compared with our competitors overseas, and our world leading sustainability practices</li> <li>Every individual takes responsibility for their own role in maintaining market access for all of industry</li> </ul> <p><b>Meaningful market access</b></p> <ul style="list-style-type: none"> <li>We have secured reductions to tariff and non-tariff barriers</li> <li>We have easy access to effective options for crop protection to manage pests and diseases, while maintaining either low or no residues</li> <li>We have reduced the compliance burden by minimizing duplication, and ensuring compliance is outcomes based</li> </ul>

<p>Key shifts to deliver success</p>	<ul style="list-style-type: none"> <li>• Enable trade by increasing and communicating our knowledge and insights on market access requirements and geo-political risks that:             <ul style="list-style-type: none"> <li>- support members to make robust commercial choices of their portfolio of current and target markets, based on analysis of risks and benefits</li> <li>- increase members' agility to proactively scan and respond to market volatility</li> </ul> </li> <li>• Strengthen our relationship-based approaches to secure new markets</li> <li>• Assist government agencies to design policy to reduce tariff and non-tariff barriers, and increase access to options for crop protection that more easily meet emerging market access requirements</li> <li>• Make choices on research and development programmes that support industry with options to more easily meet market access requirements</li> </ul>
<p>How NZAPI will support and enable our industry</p>	<p><b>Security of market access</b></p> <p>Gather and share technical market access knowledge and provide insights on risks and benefits to members and government partners</p> <p>Gather knowledge and insights on global competitors, and disseminate insights to members</p> <p>Draw on leading edge knowledge of policy issues and global competition to advocate for industry to defend access to current markets, and to facilitate access to new target markets</p> <p>Provide market access programmes, systems and tools that enable members to meet export market standards and manage market access threats</p> <p>Support members to understand their responsibilities and to implement operational practices which meet access requirements</p> <p><b>Meaningful market access</b></p> <p>Monitor onshore and offshore regulations, and advocate for the reduction of trade and non-tariff barriers and market access compliance costs</p> <p>Develop and advocate options and invest in R&amp;D to find solutions which provide efficient and effective crop protection</p>

## STRATEGIC PRIORITY – BIOSECURITY

### We are resilient to biosecurity threats and incursions

This priority is about safeguarding our industry from unwanted pests and diseases, and ensuring we are prepared to respond to unwanted incursions. It is also about advocating solutions to government to negotiate policy on biosecurity risks, response and requirements.

<p>Why does this matter?</p>	<ul style="list-style-type: none"> <li>• Unwanted pests and diseases have market access and crop health implications. Depending on the incursion:             <ul style="list-style-type: none"> <li>- access to markets could be revoked, and</li> <li>- fruit produced could be destroyed, or of lower quality, reducing profitability and tarnishing New Zealand’s high-quality reputation</li> </ul> </li> <li>• Whilst our borders are our first line of defence, we still need to be ready to respond to unwanted biosecurity incursions to minimise impact on market access and crop health</li> <li>• Biosecurity threats are constantly evolving. Climate change, and the changing demographics of our visitors, will lead to changes in pests and diseases and their lifecycles, potentially requiring us to adjust our response</li> </ul>
<p>What does success look like for industry in 2035?</p>	<p><b>Monitoring and assessing threats</b></p> <ul style="list-style-type: none"> <li>• We have knowledge of trending global biosecurity threats so we can proactively assess risks and appropriately prepare to protect market access and profitability</li> </ul> <p><b>Readiness and response</b></p> <ul style="list-style-type: none"> <li>• We have access to the right tools at the right time to respond effectively to unwanted pest and disease incursions, and minimise the impact of longer flow-on effects to market access and profitability</li> </ul> <p><b>Balancing protection and regulation</b></p> <ul style="list-style-type: none"> <li>• We are a strong and influential GIA partner, with government and other industry signatory bodies, which helps protect us from known and unknown threats</li> <li>• Government policy and regulation protect us from incursions, while minimising the regulatory load for members</li> </ul>
<p>Key shifts to deliver success</p>	<ul style="list-style-type: none"> <li>• Strengthen the proactive monitoring and knowledge sharing of evolving and emerging biosecurity threats in partnership with MPI and science providers</li> <li>• Assist government agencies to design policy that minimises biosecurity requirements in export markets, and reduce domestic regulatory compliance requirements where possible</li> <li>• Build stronger relationships and partnerships to share knowledge across wider industry and our communities so we are ready to respond to unwanted pests and diseases alongside our neighbours</li> <li>• Strengthen the development, communication and implementation of readiness and response plans to members and our communities</li> </ul>

	<ul style="list-style-type: none"> <li>• Include long term market access recovery in readiness and response plans, to minimise market access disruption during an incursion</li> <li>• Undertake research and development to strengthen our understanding of impending risks, and control actions and outcomes</li> </ul>
<p>How NZAPI will support and enable our industry</p>	<p><b>Monitoring and assessing threats</b></p> <p>Proactively monitor trending overseas biosecurity threats, and potential changes to pests and diseases due to climate change and other evolving dynamics</p> <p><b>Readiness and response</b></p> <p>Leading the industry response in the event of an apples or pears biosecurity incursion</p> <p>Provide members with knowledge and practical tools on biosecurity awareness to mitigate key risks, and services to support readiness and response</p> <p><b>Balancing protection and regulation</b></p> <p>Advocate with government, regulators, and other industry body groups to negotiate policy on biosecurity response and requirements</p> <p>Be an active participant in the New Zealand Government Industry Agreement (GIA) on Biosecurity Readiness and Response</p> <p>Invest in R&amp;D to find solutions which respond to changes in pests and diseases from climate change that increase biosecurity risk</p>

## STRATEGIC PRIORITY – WORKFORCE

### We have access to the right workforce at the right time

This priority is about supporting our industry to have access to a productive workforce that supports industry growth, and enables our communities to thrive. It is also about futureproofing industry by harnessing technology across our supply chain.

<p>Why does this matter?</p>	<ul style="list-style-type: none"> <li>It is challenging to attract people to the industry, so a heightened focus to attract, train, and retain kiwi capability is needed</li> <li>The framework for the RSE scheme is increasingly unviable, and the industry is not well positioned as an attractive employment opportunity</li> <li>Our ambition to grow relies on transformational approaches, to secure a productive and appropriately skilled workforce for seasonal and permanent work</li> </ul>
<p>What does success look like for industry in 2035?</p>	<p><b>Skilled workforce</b></p> <ul style="list-style-type: none"> <li>We have positioned the industry to attract, retain and grow domestic employees. More New Zealanders are enjoying work in the horticulture industry on both a seasonal and permanent basis</li> <li>Employers have access to the required skilled workforce at the required time, and enjoy social licence to operate</li> <li>We have reduced barriers to employment in our industry for disadvantaged people in our communities</li> </ul> <p><b>Viable workforce</b></p> <ul style="list-style-type: none"> <li>Employment schemes are reliable and affordable, and beneficial for all participants. The voice of our global partners is heard, and we have mechanisms to hold the industry to account to undertake good practice</li> <li>We have ready access to international seasonal labour</li> <li>We will support and complement our workforce with more use of innovative robotics and automation systems</li> </ul>
<p>Key shifts to deliver success</p>	<ul style="list-style-type: none"> <li>Assist government agencies to design policy changes to employment schemes that increase the viability of the seasonal workforce</li> <li>Work with HortNZ to refresh the industry workforce transformation plan to attract, retain and grow the permanent and seasonal domestic workforce</li> <li>Within our R&amp;D projects and industry partnerships, facilitate the discovery of more robotics and automation systems to improve efficiency and reduce reliance on labour</li> </ul>
<p>How NZAPI will support and enable our industry</p>	<p><b>Skilled workforce</b></p> <p>Collaborate and agree responsibilities with our horticulture industry partners to refresh and implement the industry workforce transformation plan</p> <p>Engage with iwi/Māori on approaches to reduce barriers to entry and attract Māori to participate in the horticulture sector through investment and employment opportunities</p>



Engage with key training partners to promote fit for purpose industry curricula across all levels of tertiary education, and for support with apprenticeships and micro-training

**Viable workforce**

Collaborate and agree responsibilities with our horticulture industry partners and iwi/Māori to strengthen relationships with central government to advocate for changes more strongly to the RSE scheme and to secure its longevity

Advocate to local councils and regional government bodies to gain support for the different workforce needs across our regions

Support members to engage with research and development institutions to secure an increased focus on automation across industry

## STRATEGIC PRIORITY – ENVIRONMENT

### We use natural resources sustainably, and minimise our environmental impact

This priority is about enhanced environmental outcomes across our supply chain, improving data collection and analysis to make more informed choices, and using natural resources in a sustainable way.

<p>Why does this matter?</p>	<ul style="list-style-type: none"> <li>• International competition is increasing, and our seasonal advantage is reducing. Our industry cannot compete on price. New Zealand’s clean and green image contributes towards the market premium for our apples and pears, and should be maintained and strengthened as our point of difference in the market</li> <li>• Market access requirements, driven by consumer preferences, are increasingly requiring more information about sustainability across our supply chain. To retain our social licence, we need to improve our data capture and analysis tools to meet this need for market access security</li> <li>• Secure access to water and other natural resources is increasingly under threat, and approaches to manage our natural resources sustainably need to be considered in the context of central and local government responsibilities and te ao Māori</li> <li>• Land change use, particularly urban sprawl, can impact on our growing conditions. To protect our industry, we need to engage in discussions on the design of national policy standards, and of local interpretations</li> </ul>
<p>What does success look like for industry in 2035?</p>	<p><b>Operating sustainably</b></p> <ul style="list-style-type: none"> <li>• We use resources in a sustainable way now, balanced with maximising output value, so that future generations can use them later</li> <li>• We reduce industry’s carbon footprint in the long term and maintain our social licence to operate</li> <li>• We meet requirements to continue to grow, harvest and export in the immediate and long term</li> </ul> <p><b>Effective partnerships</b></p> <ul style="list-style-type: none"> <li>• We have partnerships with local councils and iwi to best manage access to and use of natural resources</li> </ul>
<p>Key shifts to deliver success</p>	<ul style="list-style-type: none"> <li>• Improve our knowledge and information collection of natural resources use and environment impacts, to support more informed decisions to meet emerging market access requirements in the short term, and monitor environmental sustainability in the long term</li> <li>• Optimise growing practices through technology to improve our environmental sustainability</li> <li>• Increase industry resilience to severe weather events, tailored to regional contexts</li> <li>• Strengthen engagement with local government and iwi to secure access to natural resources</li> </ul>

How NZAPI will support  
and enable industry

HortNZ leads the policy to achieve environmental and sustainability outcomes for the horticulture sector. NZAPI will collaborate with HortNZ and support our industry to make changes that are required. NZAPI will also use our voice to ensure the market access needs of members are met.

**Operating sustainably**

- HortNZ leads alignment and prioritisation of research and development to better manage water. In support of our members, NZAPI will:
  - monitor environmental market access requirements and provide tools to members to report on environmental performance
  - undertake and align research and development to create technology that improves sustainability and resilience by smarter use of resources

**Effective partnerships**

HortNZ will lead:

- engagement with local councils to promote our industry needs for access to water and other natural resources, and for land-use changes that protect our industry
- engagement with iwi to grow our understanding of their interests and needs regarding access to water within the context of te ao Māori

## STRATEGIC PRIORITY - ENABLING AND SUPPORTING INDUSTRY AMBITION

### We have the services and the voice we need to prosper

This priority is about how NZAPI will ensure the needs and priorities of its diverse members are understood, reflected in core programmes and services, supported through our research and development programme, and heard in government policy development. It also focuses on how our wider horticultural industry can work together to prosper.

<p>Why does this matter?</p>	<ul style="list-style-type: none"> <li>• To realise our industry ambition, we need to be supported by the right policy settings, by programmes and services which address industry challenges, by knowledge and insights to inform our decision making, and by innovation to reduce costs and prepare for the future</li> <li>• NZAPI is a small organisation, and needs to make robust choices about where to focus its efforts, and what can be progressed by other industry bodies or other stakeholders. This reduces duplication across the industry, and ensures trust and confidence in the use of our levy funds</li> <li>• We are better together, and will be most successful if we are a cohesive industry, working with mutual trust and in collaboration towards our shared interests</li> </ul>
<p>What does success look like for industry in 2035?</p>	<p>We have strong engagement and connection with our members, who feel supported and recognise our value delivered through:</p> <p><b>A cohesive horticulture industry</b></p> <ul style="list-style-type: none"> <li>• A shared understanding across the wider horticultural industry about who will lead, participate or observe across our shared priorities, and effective collaboration for efficiencies and mutual benefit</li> </ul> <p><b>More focused effort</b></p> <ul style="list-style-type: none"> <li>• Strong and effective in advocacy to government on our interests and needs</li> <li>• Our research and development programmes which advance our strategic priorities. Together, the programmes effectively balance the need to meet key industry challenges to maintain and grow market access, and to prepare the industry for future challenges</li> <li>• Access for members to timely and relevant data, and knowledge and insights to inform their commercial decision-making</li> <li>• Well received opportunities for knowledge sharing and mutual support between members</li> <li>• Preparing our members for crises and providing effective support to help recovery</li> </ul> <p><b>Progressing strategy</b></p> <ul style="list-style-type: none"> <li>• Dividends from Prevar that are applied effectively for industry good</li> <li>• An NZAPI Board that is well informed about the interests and needs of its diverse members, and members well informed about the direction and decisions of the Board</li> </ul>

	<ul style="list-style-type: none"> <li>• Making progress towards achieving our strategic goals, with well managed approaches to refine and adjust as required</li> <li>• Our industry has grown through a greater proportion of Māori owned land, which is high value, sustainable horticulture, and the number and profitability of Māori owned businesses have increased</li> </ul>
<p>Key shifts to deliver success</p>	<ul style="list-style-type: none"> <li>• Agree arrangements across the wider horticultural industry, including with international counterparts, and other NZ sectors, to strengthen collaboration and reduce any duplication of effort</li> <li>• Strengthen industry’s voice to advocate effectively, communicating members’ interests and needs to decision-makers</li> <li>• Innovate and invest through R&amp;D, and knowledge of initiatives overseas to be future-fit in response to a changing world</li> <li>• Strengthen our communication and engagement with members, including:             <ul style="list-style-type: none"> <li>- arrangements to ensure a strong voice across our diverse members to inform NZAPI decision making</li> <li>- timely communication on Board strategic decisions, and on progress to implement our strategy</li> <li>- stronger opportunities for members to contribute to activities that advance our strategic priorities, and to collaborate with and support each other</li> <li>- increased data gathering and analysis, scanning of trends and emerging issues to inform evidence-based decision-making and to disseminate insights to members</li> </ul> </li> <li>• Review NZAPI’s relationship with Prevar, to position this for industry good</li> <li>• Develop plans which support our industry to respond to and recover from crises, in collaboration with our communities</li> </ul>
<p>How NZAPI will support and enable industry</p>	<p><b>A cohesive horticulture industry</b></p> <ul style="list-style-type: none"> <li>• Agree with HortNZ and other industry product groups how work on shared interests will be delivered</li> </ul> <p><b>More focused effort</b></p> <ul style="list-style-type: none"> <li>• Develop and deliver an advocacy strategy and plan</li> <li>• Continue and strengthen research and development programmes and communicate knowledge of innovation overseas that effectively respond to key industry challenges to maintain and grow market access, increase productivity, reduce the costs of production, and to prepare the industry for future challenges</li> <li>• Continue to provide a suite of programmes and services for members, that are easy to access and engage with</li> <li>• Develop and deliver a member communications and engagement plan</li> </ul> <p><b>Progressing strategy</b></p>

- Develop a phased strategy implementation plan which maintains NZAPI core services alongside the implementation of the industry strategy, and to monitor and report on progress
- Align NZAPI capability to the strategic priorities, with a continuous process of training and support for NZAPI staff, and drawing on external specialist expertise where required
- Review the skills and experience required on the NZAPI Board and establish arrangements to strengthen the voice of our diverse members to inform governance decision-making
- Monitor progress towards achieving the Aotearoa Horticulture Action Plan to hold industry bodies accountable, on behalf of our apple and pear membership