New Zealand Apples & Pears®

Growing Together:

Priorities for a prosperous New Zealand apple and pear industry

New Zealand's growers produce the best apples and pears in the world. Our industry is a cornerstone of New Zealand's horticultural sector and a billion-dollar contributor to the national economy.

Our growers care deeply about the enduring health of our land, sector and communities. They are world leaders in sustainable production, lowering chemistry usage by more than 90 percent and embracing advanced growing and irrigation techniques to ensure best practice use of Aotearoa New Zealand's natural resources.

From orchards to packhouses, the apple and pear sector employs more than 13,500 people in permanent and seasonal roles. The industry also employs approximately half of all Recognised Seasonal Employer (RSE) positions, with this vital Pacific workforce underpinning regional communities and supporting economic resilience across the country and the Pacific.

Success is driven by productivity and innovation, and underpinned by bioprotection and market access. Advances in orchard and packhouse practices deliver significant efficiency gains, while the development of high-value varieties that are tailored to consumer preferences, and our cohesive work programme with MPI to access high-value markets, has fuelled exponential growth.

In just over a decade, the sector has grown by 217 percent. In 2012, apple and pear exports were valued at $347 million and by November 2025, the sector had grown to $1.1 billion. The Ministry for Primary Industries has forecast the sector's export revenue to grow to $1.4 billion by 2029, a figure that NZAPI considers conservative and one that we have a roadmap to surpass.

Success, while a testament to the adaptability and ambition of our growers and exporters, cannot be achieved alone.

Continued progress depends on strong partnership with Government to ensure policy settings enable sustainable growth, a reliable workforce, innovative and result-driven research programmes, seamless access to markets across the globe, and the highest standards of environmental and social responsibility.

Together, we can deliver immense benefit to New Zealand, our communities and economies in 2026 and beyond.

> Ours is a sector that is worth backing. So, let's grow together.

$2.5 BILLION
total impact on economy

11,123 HA
planted for export

>13,500
total employed

2nd LARGEST
New Zealand horticulture sector

1 | Seamless access to global markets

The challenge:

New Zealand's apple and pear sector has a formidable reputation for navigating and resolving tariff and non-tariff barriers however we must continue to advance our practices, with competitors increasingly gaining access to markets we once dominated.

The New Zealand apple and pear sector has significant growth potential, with an ambition of reaching $2 billion in export revenue by 2035. Yet this is unlikely to be achieved without continued progress in market settings.

New and improved market access opportunities will be critical. Priority markets include Japan, where our systems approach must be accepted as a technical and bilateral assurance programme to reduce non-tariff barriers. Japan is currently worth $20mil to New Zealand's apple and pear industry, but could be worth ten times this if the systems approach were accepted. Other key markets include Korea and India, and Viet Nam and Taiwan for pears.

The challenge:

While the bioprotection processes in New Zealand are world-leading, the sector must continue to evolve and challenge pest and disease management systems to prevent threats to existing markets.

Changes in export market regulatory requirements and an emerging resistance to chemistries reduces control options faster than we can gain access to new tools, while climate change threatens further disruption to the understood lifecycles of common pest and diseases.

Congestion in the approval process for new control methods will continue to disadvantage New Zealand growers. The significant steps already taken by agencies to streamline their systems have been gratefully received by growers, but this work must continue to enable faster delivery of new chemistry.

Our solutions:

- Increase efforts to secure approval of New Zealand's systems approach in Japan.
- Adequately resource MPI teams who are involved in technical market access to support the maintenance of markets in today's volatile international trading environment.
- Ensure a dual focus on diversification to new markets as well as improving technical or bilateral areas in existing and proven markets.
- Seek out efficiencies across agencies to streamline approval of new control methods and chemistry.

2 | Tangible, outcome-driven research programmes

The challenge:

New Zealand's world-leading advantage is threatened as other countries invest heavily in research and development.

The New Zealand pipfruit sector leads the world in bioprotection and technical market access thanks to innovative, industry-led R&D programmes. This research is jointly funded by NZAPI and the Government and is science only New Zealand can do.

We must back ourselves to continue to deliver a competitive edge through the practical application of new bioprotection techniques. It is vital to protect and grow our export markets, and a major strategic play for NZ Inc and trade negotiations. Industry-led research gives our sector the best chance to grow volumes and revenue. It also has the potential to address future changes in pest and disease patterns caused by climate change.

To do this we need security in our innovation pipeline and future generations of scientists that have tactical industry experience and a knowledge of our systems.

The challenge:

Despite the apple and pear sector successfully investing in advanced practises for more than 20 years, the rapid global advancement of technologies maintains pressure for applied, co-funded R&D to improve industry outcomes.

Industry alone cannot drive Horizon 2 research with a focus on emerging opportunities. Yet, we must bridge today's core business (Horizon One) with future transformative ideas (Horizon Three).

NZAPI's established R&D programme delivers considerable incremental improvements but for the sector to continue advancing, investigations into new higher-risk technologies with clear potential for growth need to be part of this mix.

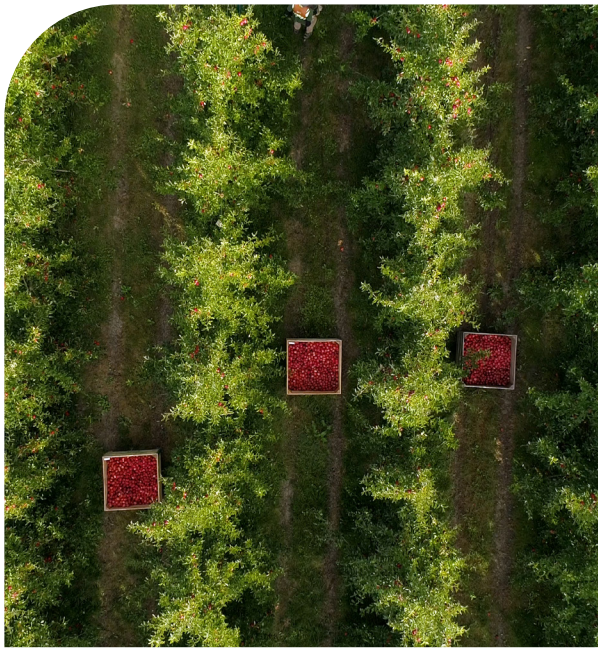
Precision breeding is an example of this. Approval of this new technology would significantly reduce breeding programme timeframes and deliver better bioprotection and further reductions in chemical use.

It is critical however, that any changes in this domain do not negatively impact current and future market access opportunities or organic producers. A framework must be developed where conventional, precision breeding and organic production systems can co-exist, providing confidence growers, customers and consumers.

Our solutions:

- **Increased spending for Government-backed, industry-led research programmes that deliver tangible bioprotection solutions to address market access challenges.**
- **Science system funding directed to high-risk, high-reward science programmes aligned with industry outcomes.**
- **Gene Technology Bill is passed into law with laser focus on market access and organic producer protection and definitions between GE (gene editing) and GMO (genetically modified organisms).**

3 | An economic environment that supports sustainable growth

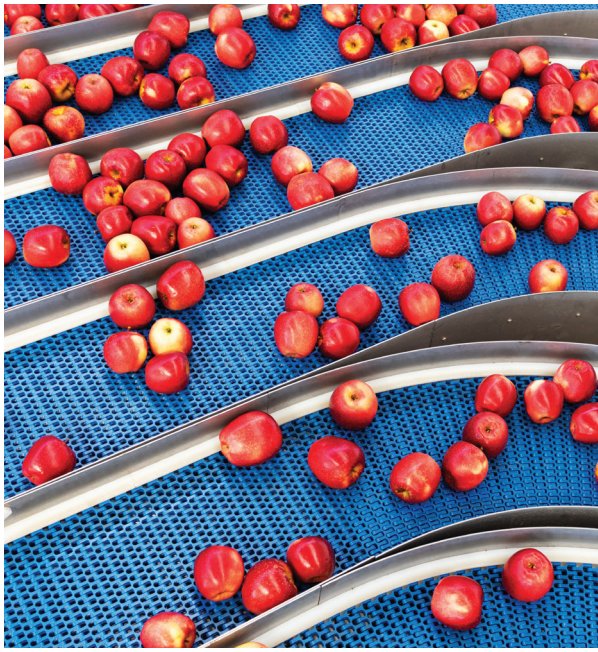


The challenge:

Increased export revenue should deliver results to the industry; however, a rise in cost of production is eating away at thin margins.

Supportive policy and regulatory settings and a strong economy are essential to help our growers grow. Labour costs, fuel, transport and postharvest costs continue to impact the production cost structure in New Zealand. The cost of apples to New Zealand consumers is sometimes only just at break-even rates.

Layers of compliance add to running costs. A review of the overly costly and complex system and a removal of duplication poses a real opportunity for streamlining and cost reduction.



The challenge:

Efficiency and productivity gains are ripe for the picking but require access to new capital. The top 25 percent of apple and pear growers consistently lodge profits, however capital investment is required to lift the performance of lower quartile businesses.

New, high-yield varieties deliver profits; however these do not happen overnight. Redevelopment from traditional varieties to more profitable varieties, planting systems (space and tree structures) and investment in labour-efficient technologies continues to prove valuable for growers who can afford it. License fees and redevelopment requires upfront capital that is not always accessible to growers, with investment barriers preventing would-be external funders.

A long-term view is needed for the financial infrastructure that encompasses horticulture. NZAPI champions financial settings that are attractive to new investors, whether they be local, foreign, traditional or new.

Our solutions:

- **Get the basics right for business. Restoring economic performance is critical.**
- **Reduce red tape by accepting GlobalG.A.P. as adequate proof that growers meet regulatory requirements for the environment, food safety and social practise. G.A.P. is the sector's global certification framework and internationally recognised for providing exceptionally high levels of assurance.**
- **Review financial settings to allow for long-term and intergenerational investment in horticulture.**
- **Work with industry to ensure solutions are practical, scalable and fit for purpose for growers.**
- **Ensure a cumulative impact view can taken by Government on costs to business and the sector. Costs within the Food Act levy, ACC levies, business registration, Freshwater Farm Plans, ePhyto certifications and Trade Certification system are currently viewed in isolation but add up.**

4 | Certainty for Pacific workers and employers

The challenge:

The RSE Scheme is essential to the billion-dollar pipfruit sector, providing seasonal workers during peak periods and ensuring the industry's success and the continued permanent employment of thousands of New Zealanders.

Yet, while the scheme has remained largely untouched since its inception in 2007, the modern ecosystem it exists within is immensely more complex.

Components of the RSE Scheme are now challenged and overridden by employment law, leaving workers with little clarity and employers exposed to significant risks associated with complexity and red tape.

Growers throughout the industry are committed to working with the Ministry of Social Development and its partners to build a local work-ready workforce, however, a loss of labour through the RSE Scheme would pose a major risk to the industry. A secure workforce underpins the future of the sector. Immigration settings must reflect the realities of horticulture and the RSE scheme needs long-term certainty. Not doing so risks the permanent employment of New Zealanders.

A review of the scheme, which was started in 2019 to address these concerns, has been consistently postponed and remains incomplete despite the very real impacts on key export industries.

Our solutions:

- **The RSE policy review must be conducted in consultation with industry and then concluded and implemented.**
- **The RSE Scheme must align with Employment Law.**
- **The RSE Scheme needs to revert to its initial principles of mutual benefits for its Pacific partners and fairness and equity for employers and New Zealand workers.**
- **Provide long-term certainty for the RSE scheme, including alignment of settings, policy completion, and operational efficiency.**

5 | Protection of our land, natural resources and biosecurity

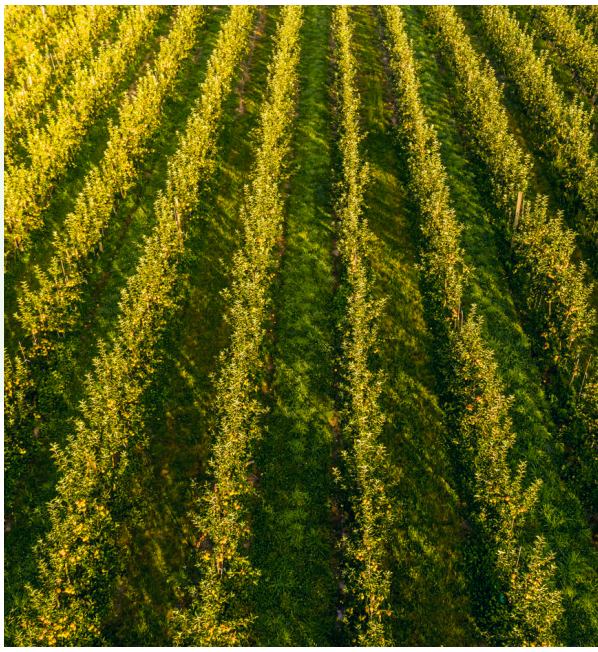
The challenge:

Climate change is influencing New Zealand's vital biosecurity network, making sector support and participation vital.

Apple and pear growers are deeply committed to our nation's biosecurity and contribute - in practice and financially - to incursions and responses via the Government Industry Agreement for Biosecurity Readiness and Response (GIA).

However, as temperatures and climate patterns change, we risk an increase in biosecurity incursions. Warmer conditions can alter lifecycles and behaviours of the pests and diseases that threaten our sector.

The reporting of potential biosecurity risks must be encouraged and supported through a commitment to fair and equitable compensation. It is vital that compensation is retained as a cornerstone of Aotearoa New Zealand's biosecurity network and that preparedness takes place during peace time, rather than when a biosecurity crisis hits.



Our solutions:

- **Bilateral commitment to effective and fair compensation for affected growers during a biosecurity incursion or response.**
- **Maintained and strengthened support for Government Industry Agreement for Biosecurity Readiness and Response.**

The challenge:

New Zealand's apple and pear growers are dependent on the health of the environment, which is why our industry is committed to sustainable practices that care and protect the whenua. However, growers also need reliable access to water and productive land.

Water security is critical to achieving our sector's goal of $2 billion in export revenue, as is having access to highly productive, fertile land and soils, which are threatened by urban sprawl, flooding and adverse upstream use.

NZAPI works closely with Horticulture New Zealand in this area to ensure central and local government regulations take a 360 degree, sustainable approach to environment, sector, community and economy.

Our solutions:

- **Policy settings that allow for flexible water allocations for redevelopment, land use change, expansion and investment in new varieties.**
- **Relieve pressure on freshwater systems through the delivery of water storage projects, with supportive policy settings allowing time for development before significant reduction in water consents.**