



2024-2025 Collaborative Marketing Disclosure

Regulation 15 of the Kiwifruit Export Regulations 1999

In accordance with regulation 15 of the Kiwifruit Export Regulations 1999, Kiwifruit New Zealand must, within three months after the end of each season, publicly disclose for that season -

- (a) the identity of each person approved by the Board to be a collaborative marketing approval holder; and
 - (b) the volume of kiwifruit marketed by each collaborative marketing approval holder; and
 - (c) financial information to enable an assessment to be made as to whether the net returns to suppliers in respect of each collaborative marketing arrangement were greater than would have been the case if the collaborative marketing arrangement had not been approved, including the methodology used by Zespri to allocate costs to the collaborative marketing approval holder.
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1. Kiwifruit

The results for each collaborative marketing arrangement are set out in Table 1 below.

Table 1: 2024-2025 collaborative marketing arrangement performance relative to Zespri

Collaborative Marketer 2024-25 Season <i>(note 1)</i>	Arrangement	Fruit type	Volume (trays) 2024-25 season	Net incremental OGR of Zespri/alternate market NZ \$ (note 2)	Weighted index to Zespri/ alternate market
Vida Produce Company	Guatemala	Class 2 SunGold	8,031	38,529	164%
Vida Produce Company	El Salvador	Class 2 SunGold	8,258	34,570	156%
European Partners Citrus	Canary & Balearic Islands	Class 2 Green	49,156	166,635	156%
Vida Produce Company	El Salvador	Class 2 Green	8,185	25,238	151%
Vida Produce Company	Costa Rica	Class 2 SunGold	23,817	83,682	147%
Mr Apple NZ	Kuwait	Class 1 Green	32,560	128,765	147%
Mr Apple NZ	UAE	Class 1 Green	168,936	610,239	143%
Vida Produce Company	Costa Rica	Class 2 Green	17,690	41,964	139%
Southern Produce Limited	Austria	Class 1 Green	35,594	96,425	139%
Vida Produce Company	Guatemala	Class 2 Green	16,099	36,962	138%
Mr Apple NZ	Bahrain	Class 1 Green	23,227	67,419	134%
European Partners Citrus	Canary & Balearic Islands	Class 1 Green	173,086	454,800	133%
Southern Fresh Fruit Exports Ltd	Philippines	Class 1 Green	136,176	353,282	126%
Maori Kiwifruit Growers Limited	USA	Class 1 SunGold	61,903	168,574	125%
Maori Kiwifruit Growers Limited	USA	Class 1 Green	25,608	53,385	123%
Mr Apple NZ	Qatar	Class 1 Green	13,182	25,155	123%
Mr Apple NZ	Kuwait	Class 1 SunGold	22,560	53,682	122%
Mr Apple NZ	South Africa	Class 2 Green	276,753	295,677	118%
Mr Apple NZ	UAE	Class 1 SunGold	188,720	371,568	118%
Eastpack Limited	Kenya	Class 2 Green	10,841	9,777	115%
Te Awanui Huka Pak Limited	Malaysia	Class 1 Green Organic	1,522	2,433	114%
European Partners Citrus	Canary & Balearic Islands	Class 1 SunGold	26,861	43,643	114%
Mr Apple NZ	UAE	Class 2 Green Organic	4,255	5,787	112%
Southern Produce Limited	USA	Class 1 Green Organic	70,768	122,536	111%
Freshmax NZ Limited	Indonesia	Class 1 SunGold	43,296	61,570	111%
Mr Apple NZ	Qatar	Class 1 SunGold	51,412	58,847	110%
Bella Frutta	Greece	Class 2 Green	40,987	22,654	109%
Vida Produce Company	Panama	Class 1 SunGold	7,040	6,223	108%
Te Awanui Huka Pak Limited	Malaysia	Class 1 Green	114,372	93,203	108%
Mr Apple NZ	Bahrain	Class 1 SunGold	37,424	33,918	108%
Fern Ridge Produce Limited	Reunion Island	Class 1 Green	66,545	45,834	108%
Fern Ridge Produce Limited	USA	Class 1 Green	15,464	9,108	107%
Southern Fresh Fruit Exports Ltd	Philippines	Class 1 SunGold Organic	744	955	107%
Freshmax NZ Limited	Indonesia	Class 1 Green	10,411	5,996	106%
Fresha Exports Limited	Pacific Islands	Class 1 SunGold	2,844	1,079	105%
Southern Produce Limited	USA	Class 1 Green	919,683	388,615	105%
South Seas Export Limited	Pacific Islands	Class 1 Green	17,678	5,816	104%
Fern Ridge Produce Limited	USA	Class 1 SunGold	799	368	104%
Fresha Exports Limited	Pacific Islands	Class 1 Green	8,810	2,113	103%
Mr Apple NZ	Saudi Arabia	Class 1 SunGold	357,782	101,835	103%
Fern Ridge Produce Limited	Mauritius	Class 1 Green	56,545	12,112	103%
Mr Apple NZ	Bahrain	Class 2 Green Organic	312	80	102%
South Seas Export Limited	Pacific Islands	Class 2 SunGold	6,187	319	101%
South Seas Export Limited	Pacific Islands	Class 1 SunGold	2,588	154	101%
Southern Produce Limited	Austria	Class 1 SunGold	8,168	700	101%
Turners & Growers Pacific Limited	Pacific Islands	Class 2 SunGold	11,989	(104)	100%
Fresha Exports Limited	Pacific Islands	Class 2 SunGold	9,320	(92)	100%
Freshmax NZ Limited	India	Class 1 Green	702,043	(7,798)	100%
Turners & Growers Pacific Limited	Pacific Islands	Class 1 SunGold	10,169	(897)	99%
Eastpack Limited	Kenya	Class 2 SunGold	1,008	(108)	99%
Southern Fresh Fruit Exports Ltd	Philippines	Class 1 SunGold	124,836	(17,082)	99%

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Collaborative Marketer 2024-25 Season (<i>note 1</i>)	Arrangement	Fruit type	Volume (trays) 2024-25 season	Net incremental OGR of Zespri/alternate market NZ \$ (<i>note 2</i>)	Weighted index to Zespri/ alternate market
Mr Apple NZ	UAE	Class 1 SunGold Organic	4,825	(1,523)	98%
Turners & Growers Pacific Limited	Pacific Islands	Class 1 Green	37,965	(7,929)	97%
Mr Apple NZ	South Africa	Class 2 SunGold	73,498	(39,028)	93%
Turners & Growers Limited	Thailand	Class 1 SunGold	419,945	(483,639)	91%
Turners & Growers Limited	Thailand	Class 1 Green	302,804	(262,376)	91%
Jingold (<i>note 3</i>)	Italy	Class 1 Gold	3,188	(3,590)	90%
Evrosad Limited	Slovenia	Class 2 SunGold	16,558	(16,566)	87%
Fern Ridge Produce Limited	Mauritius	Class 1 SunGold	36,301	(56,891)	86%
Mr Apple NZ	Bahrain	Class 1 SunGold Organic	288	(624)	84%
Fern Ridge Produce Limited	Reunion Island	Class 1 SunGold	68,380	(127,201)	83%
Evrosad Limited	Slovenia	Class 1 Green	49,334	(134,319)	68%
Bella Frutta Europe	Greece	Class 2 SunGold	6,837	(17,614)	66%
Mr Apple NZ - Nutrikiwi (<i>note 4</i>)	Saudi Arabia	Class 2 Green	82,700	380,420	
TOTAL			5,134,867	3,345,265	

Notes:

- 1 Season is defined in the Kiwifruit Export Regulations 1999 as a period of 12 months commencing on 1 April in any year and ending with 31 March the following year.
- 2 A comparative assessment has been undertaken in relation to the actual growing/export year which largely overlaps with "season." This assessment therefore uses the volumes marketed under the collaborative marketing arrangement in the 2024-25 growing/export year
- 3 This CM arrangement is an early-stage trial. Given the very small volumes, the standard benchmark methodology could not produce an accurate OGR return. Therefore, this weighted index result is based on the most accurate data available.
- 4 This arrangement is for non-Zespri fruit packed for Australia or New Zealand. There is no Zespri comparative market or data therefore only the net incremental NZ dollars are shown.

Financial analysis methodology

To enable an assessment to be made of the net returns to suppliers from each collaborative marketing arrangement, and whether the returns were greater than would have been the case if the collaborative marketing arrangement had not been approved, KNZ applies the following methodology;

- The net return of each collaborative marketing arrangement is calculated back to orchard gate return (OGR) in NZ dollars. The following financial information, where applicable, is included:
 - The collaborative marketer's revenues and costs (for example, net sales, freight and insurance, direct costs, market selling costs, commission rates and exchange rates) as advised by the collaborative marketer.
 - Where kiwifruit is supplied by Zespri, the costs of supplying each arrangement are as advised by Zespri to KNZ and the Collaborative Marketer. The costs allocated by Zespri are in accordance with the annual Supply Agreement and any specific Service Level Agreements applicable to the individual collaborative marketing arrangement.

- Where kiwifruit is not from Zespri supply, onshore supply costs are as advised by the collaborative marketer.
- Where financial information is available, and KNZ is of the view it is appropriate, the benchmark returns (OGR) may be adjusted by KNZ to take other relevant factors into account, such as fruit sizes and timing of sales.
- A purposive approach is taken to the assessment recognising that information relating to the actual growing/export year (rather than a strict application of “season” which is 1 April to 31 March) allows for a more useful and reliable comparative assessment.

Net Return Indexed to Benchmark Return

The net return to New Zealand suppliers is indexed against a benchmark OGR return - calculated using the methodology outlined above.

- The average Zespri return for the closest comparable market or geographical area is calculated as a benchmark. The benchmark is used to assess what the return to suppliers would have been if the collaborative marketing arrangement had not been approved.
- If there is no comparable market, the collaborative marketing returns are benchmarked against a likely alternative market that the fruit could have been exported to, if the collaborative marketing arrangement had not been approved.
- Where there is no alternative market, the most relevant market returns are used as the benchmark.
- The return under each collaborative marketing arrangement is therefore indexed against the comparable Zespri, alternate market, or comparable market, return to suppliers.
- An index figure of **100.0** means that the net return to suppliers from the collaborative marketing arrangement was **the same as** benchmarked returns. Similarly, where the figure is less than 100, the return was less than the comparable benchmarked return. Where the figure is more than 100, the return was more than the comparable benchmarked return.
- **Table 2: Total fruit and service payment returns to suppliers per tray since 2000 to 2024 inclusive**

Year	Compared to Zespri	CM per TE TFSP	Zespri per TE TFSP
2000	\$142,464	\$5.26	\$5.13
2001	-\$1,371,226	\$5.32	\$6.06
2002	\$684,615	\$6.48	\$6.07
2003	\$738,349	\$7.56	\$7.10
2004	\$19,297	\$5.57	\$5.56
2005	-\$55,660	\$4.79	\$4.82
2006	\$202,485	\$6.85	\$6.71
2007	\$607,907	\$6.27	\$5.90
2008	\$392,174	\$7.01	\$6.80

2009	\$682,789	\$6.79	\$6.39
2010	\$858,560	\$6.82	\$6.48
2011	-\$597,545	\$6.21	\$6.38
2012	-\$547,850	\$6.71	\$6.94
2013	\$285,891	\$7.78	\$7.62
2014	\$808,983	\$8.76	\$8.26
2015	\$505,308	\$9.22	\$8.88
2016	\$2,364,727	\$7.86	\$7.00
2017	-\$841,097	8.34	8.71
2018	\$1,244,644	7.70	7.30
2019	\$237,579	9.65	9.56
2020	-\$227,897	9.99	10.05
2021	-3,148,618	9.45	10.25
2022	2,075,309	10.20	9.47
2023	1,048,142	13.56	13.23
2024-25	2,728,814	13.53	12.99
Total:	\$8,838,144	-	-

Table 3: Estimated Orchard Gate Return for 2015 to 2024 inclusive

Year	Compared to Zespri	CM per TE OGR	Zespri per TE OGR
2015	\$457,629	\$5.73	\$5.42
2016	\$1,007,127	\$4.26	\$3.89
2017	-\$591,537	\$5.58	\$5.86
2018	\$732,719	\$4.35	\$4.15
2019	\$443,270	\$6.86	\$6.73
2020	\$324,565	\$7.23	\$7.14
2021	\$-45,406	6.63	6.64
2022	1,080,718	6.28	5.89
2023	571,634	9.70	9.58
2024-25	3,345,265	9.95	9.36
Total:	\$7,325,984	-	-

Tables 2 & 3 show:

1. By year, the total amount by which the collaborative marketing programmes were greater or were less than the comparative returns to suppliers (measured at OGR).
2. For 2024-25, the average OGR per tray (orchard gate return) for all collaborative marketing arrangements was NZ\$9.95 per tray, and the average equivalent Zespri OGR return was NZ\$9.36 per tray;

3. The total amount by which collaborative marketing programmes have exceeded comparative Zespri TFSP (Total Fruit and Service Payments) for the 25 years up to and including 2024-25 is NZ\$8,838,144.

2. Kiwiberry

The kiwiberry collaborative marketing programmes operate from February to Early April in each year. The below results are for February to April 2025, and appear in alphabetical order. The assessment does not include Zespri, as it did not export kiwiberry in 2025.

Table 4: Approval holder and tray volumes for KiwiBerry (*Actinidia arguta*) for all export markets excluding Australia.

Collaborative marketing arrangements 2025 Season	Volume marketed t/e ³	Net Return Per Tray
Fresh Produce Group NZ Limited	10,422	\$33.05
Fresh Solutions Group NZ Limited	204	\$32.00
Freshmax (<i>div. VFDirect NZ Limited</i>)	97,552	\$34.77
New Zealand Gourmet Holdings Limited	1,971	\$29.22
Seeka Kiwifruit Industries Ltd	8	\$35.23
Southern Produce Limited	5,453	\$33.75
Total (average)	115,610	\$34.47