



## **2025-2026 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

**Table 1: 2025-2026 collaborative marketing arrangement performance relative to Zespri**

Collaborative Marketer 2025-26 Season ( <i>note 1</i> )	Arrangement	Fruit type	Volume (trays) 2025-26 season	Net incremental OGR of Zespri/alternate market NZ \$ ( <i>note 2</i> )	Weighted index to Zespri/ alternate market
European Partners Citrus	Balearic & Canary Islands	Class 2 Green	61,797	254,406	160%
Te Awanui Huka Pak	Malaysia	Class 1 Green Organic	1,522	7,677	156%
VPC New Zealand Limited	El Salvador	Class 2 SunGold	3,775	15,315	150%
VPC New Zealand Limited	Guatemala	Class 2 SunGold	10,752	32,436	137%
VPC New Zealand Limited	Costa Rica	Class 2 SunGold	29,359	85,549	136%
VPC New Zealand Limited	El Salvador	Class 2 Green	7,342	16,888	133%
Mr Apple NZ Limited	Kuwait	Class 1 Green	30,240	101,766	131%
Mr Apple NZ Limited	UAE	Class 1 Green	157,696	516,331	130%
VPC New Zealand Limited	Costa Rica	Class 2 Green	29,832	62,110	130%
European Partners Citrus	Balearic & Canary Islands	Class 1 SunGold	10,482	33,523	126%
VPC New Zealand Limited	Guatemala	Class 2 Green	13,085	23,083	126%
Mr Apple NZ Limited	South Africa	Class 2 Green	281,062	456,949	124%
Mr Apple NZ Limited	Bahrain	Class 2 Green Organic	312	837	123%
Bella Frutta	Bulgaria & Romania, Serbia, Nth Macedonia and Cyprus	Class 2 Green	53,083	80,388	122%
Maori Kiwifruit Growers Limited	USA	Class 1 SunGold	60,079	139,011	122%
Fern Ridge Produce Limited	Caribbean	Class 1 SunGold	1,194	2,613	121%
Mr Apple NZ Limited	Kuwait	Class 1 SunGold	40,456	101,935	121%
Southern Produce Limited	Austria	Class 1 SunGold	13,644	33,263	121%
Maori Kiwifruit Growers Limited	USA	Class 1 Green	26,488	46,922	120%
Southern Produce Limited	Austria	Class 1 Green	30,993	54,848	120%
European Partners Citrus	Balearic & Canary Islands	Class 1 Green	73,466	154,191	119%
Mr Apple NZ Limited	UAE	Class 2 Green Organic	3,664	8,272	119%
Maori Kiwifruit Growers Limited	Middle East	Class 1 Green	20,480	40,728	118%
Mr Apple NZ Limited	UAE	Class 1 SunGold	183,552	314,151	114%
Mr Apple NZ Limited	Bahrain	Class 1 Green	32,726	44,423	112%
Maori Kiwifruit Growers Limited	Middle East	Class 1 SunGold	30,720	31,239	108%
Southern Fresh Fruit Exports	Philippines	Class 1 Green	151,718	138,566	108%
Southern Produce Limited	USA	Class 1 Green	1,202,382	904,362	108%
Te Awanui Huka Pak	Malaysia	Class 1 Green	113,993	104,462	108%
Freshmax NZ Limited	Indonesia	Class 1 SunGold	45,546	33,287	106%
Freshmax NZ Limited	India	Class 1 Green	579,916	246,746	105%
Fern Ridge Produce Limited	Caribbean	Class 1 Green	13,881	4,832	104%
Bella Frutta	Bulgaria & Romania, Serbia, Nth Macedonia and Cyprus	Class 2 SunGold	6,638	1,569	103%
Freshmax NZ Limited	Indonesia	Class 1 Green	20,650	6,401	103%
South Seas Exports Limited	Pacific Islands	Class 1 SunGold	5,912	1,497	103%
Fresha Export Limited	Pacific Islands	Class 1 Green	10,589	1,848	102%
Southern Produce Limited	USA	Class 1 Green Organic	82,549	29,854	102%
South Seas Exports Limited	Pacific Islands	Class 2 SunGold	5,637	1,119	102%
VPC New Zealand Limited	Panama	Class 1 SunGold	16,360	4,152	102%
Fresha Export Limited	Pacific Islands	Class 1 SunGold	6,201	232	101%
Fresha Export Limited	Pacific Islands	Class 2 SunGold	4,433	256	101%
South Seas Exports Limited	Pacific Islands	Class 1 Green	18,739	(570)	100%
Turners & Growers Pacific Limited	Pacific Islands	Class 1 Green	34,328	(1,279)	100%
Eastpack Limited	Kenya	Class 2 Green	21,625	(2,073)	99%
Mr Apple NZ Limited	Bahrain	Class 1 SunGold	38,698	(6,164)	99%
Turners & Growers Limited	Thailand	Class 1 RubyRed	22,777	(4,093)	99%
Turners & Growers Pacific Limited	Pacific Islands	Class 2 SunGold	11,198	(1,375)	99%
Turners & Growers Pacific Limited	Pacific Islands	Class 1 SunGold	11,368	(1,729)	98%
Mr Apple NZ Limited	Qatar	Class 1 Green	23,116	(6,642)	97%
Mr Apple NZ Limited	South Africa	Class 2 SunGold	75,201	(15,543)	97%
Turners & Growers Limited	Thailand	Class 1 Green	318,995	(103,696)	97%
Mr Apple NZ Limited	Bahrain	Class 1 SunGold Organic	288	(202)	95%
Mr Apple NZ Limited	Saudi Arabia	Class 1 SunGold	390,764	(301,089)	94%
Mr Apple NZ Limited	UAE	Class 1 SunGold Organic	4,825	(5,092)	93%
Southern Fresh Fruit Exports	Philippines	Class 1 RubyRed	2,586	(3,450)	91%
Jingold	Italy	Class 1 Gold	7,267	(7,122)	91%
Fern Ridge Produce Limited	Mauritius	Class 1 Green	71,457	(81,324)	90%
Southern Fresh Fruit Exports	Philippines	Class 1 Green Organic	512	(971)	89%
Eastpack Limited	Kenya	Class 2 SunGold	1,795	(1,748)	88%
Fern Ridge Produce Limited	Reunion Island	Class 1 Green	78,399	(106,244)	88%
Freshmax NZ Limited	Indonesia	Class 1 RubyRed	2,583	(4,665)	88%
Mr Apple NZ Limited	Qatar	Class 1 SunGold	64,104	(111,122)	86%
Southern Fresh Fruit Exports	Philippines	Class 1 SunGold Organic	1,024	(2,441)	86%
Maniatutu Orchards	USA	Class 1 Green Organic	10,816	(27,256)	85%
Fern Ridge Produce Limited	Reunion Island	Class 1 SunGold	80,915	(177,174)	82%
Turners & Growers Limited	Thailand	Class 1 SunGold	470,004	(1,181,528)	81%
Fern Ridge Produce Limited	Mauritius	Class 1 SunGold	51,027	(129,449)	79%
Southern Fresh Fruit Exports	Philippines	Class 1 SunGold	136,932	(455,585)	74%
Southern Produce Limited	Italy	Process Grade SunGold	169,600	279,840	<i>*note 3</i>
Mr Apple - Nutrikiwi	Saudi Arabia	Class 2 Green	102,800	79,156	<i>*note 4</i>
<b>TOTAL</b>			<b>5,697,949</b>	<b>1,757,407</b>	

*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 2025-26 growing/export year
- 3 This arrangement is for processing grade fruit. There is no comparative data and therefore only the net variation in NZ dollars are shown.
- 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 2025 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	2,728,814	13.53	12.99
2025-26	1,892,614	14.27	13.92
Total:	\$10,730,758	-	-

**Table 3: Estimated Orchard Gate Return for 2015 to 2026 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	3,345,265	9.95	9.36
2025-26	1,757,407	10.57	10.26
Total:	\$9,083,391	-	-

**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 2025-26, the average OGR per tray (orchard gate return) for all collaborative marketing arrangements was NZ\$10.57 per tray, and the average equivalent Zespri OGR return was NZ\$10.26 per tray.
3. The total amount by which collaborative marketing programmes have exceeded comparative Zespri TFSP (Total Fruit and Service Payments) for the 26 years up to and including 2025-26 is NZ\$10,730,758.

## 2. Kiwiberry

The kiwiberry collaborative marketing programmes operate from February to Early April in each year. The below results are for February to April 2026, and appear in alphabetical order. The assessment does not include Zespri, as it did not export kiwiberry in 2026.

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

<b>Collaborative marketing arrangements 2026 Season</b>	<b>Volume marketed t/e<sup>3</sup></b>	<b>Net Return Per Tray</b>
Fresh Produce Group NZ Limited	9,688	\$28.58
Freshmax NZ Fruit Ltd	119,893	\$36.38
Seeka Kiwifruit Industries Ltd	864	\$29.88
Southern Produce Limited	5,040	\$34.42
<b>Total (average)</b>	<b>135,485</b>	<b>\$35.71</b>

Kiwifruit New Zealand  
26 June 2026