



ZESPRI AND THE KIWIFRUIT INDUSTRY

Make your healthy irresistible



OUR INDUSTRY





ZESPRI BY THE NUMBERS

1 Single Desk

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



97% OF GROWERS CONTINUE TO SUPPORT THE SINGLE DESK

EMPLOY MORE THAN **578 people**

2,792 growers in New Zealand and 1,500 international growers



We're set up this way because

GROWERS, FACED WITH CONSIDERABLE ADVERSITY, decided they could do **BETTER TOGETHER**



NZKMB - 1988 | ZESPRI - 1997

AVERAGE NZ ORCHARD SIZE:
GREEN – 3.3HA
GOLD – 3.3 HA

TOP 5 FRUIT BRAND in our major markets



NZ producing hectares

2019/2020 **12,905**

REVENUE **2018/2019**
3.355
BILLION

NZD \$3.355 BILLION IN 2018 / 2019

\$4.5 BILLION IN SALES BY 2025.

NZ'S LARGEST horticulture **export**

Active KIWIFRUIT Orchards

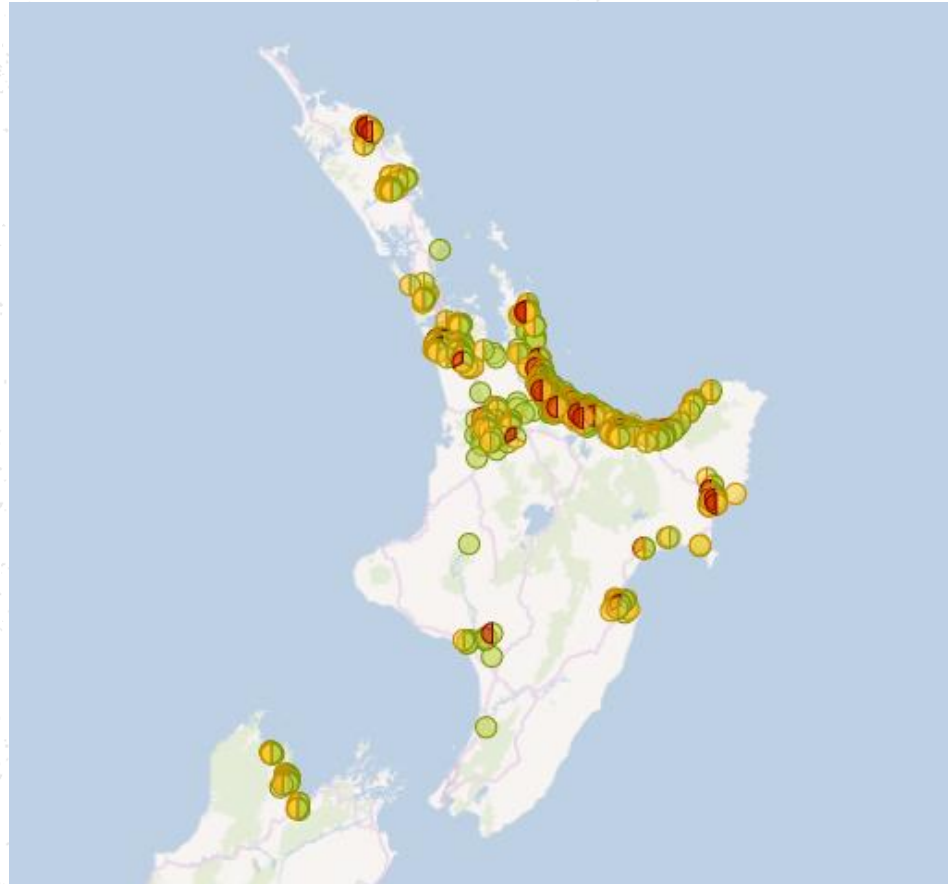
Geographical Spread of producing Hectares 2020



Supply Region	Producing Hectares
Auckland	495
Bay of Plenty	10,743
Gisborne	354
Hawkes Bay	212
Nelson	438
Northland	477
Waikato	552
Wanganui	73
Total	13,345

Active KIWIFRUIT Orchards

Geographical Spread of Active Hectares (09/10/2020)



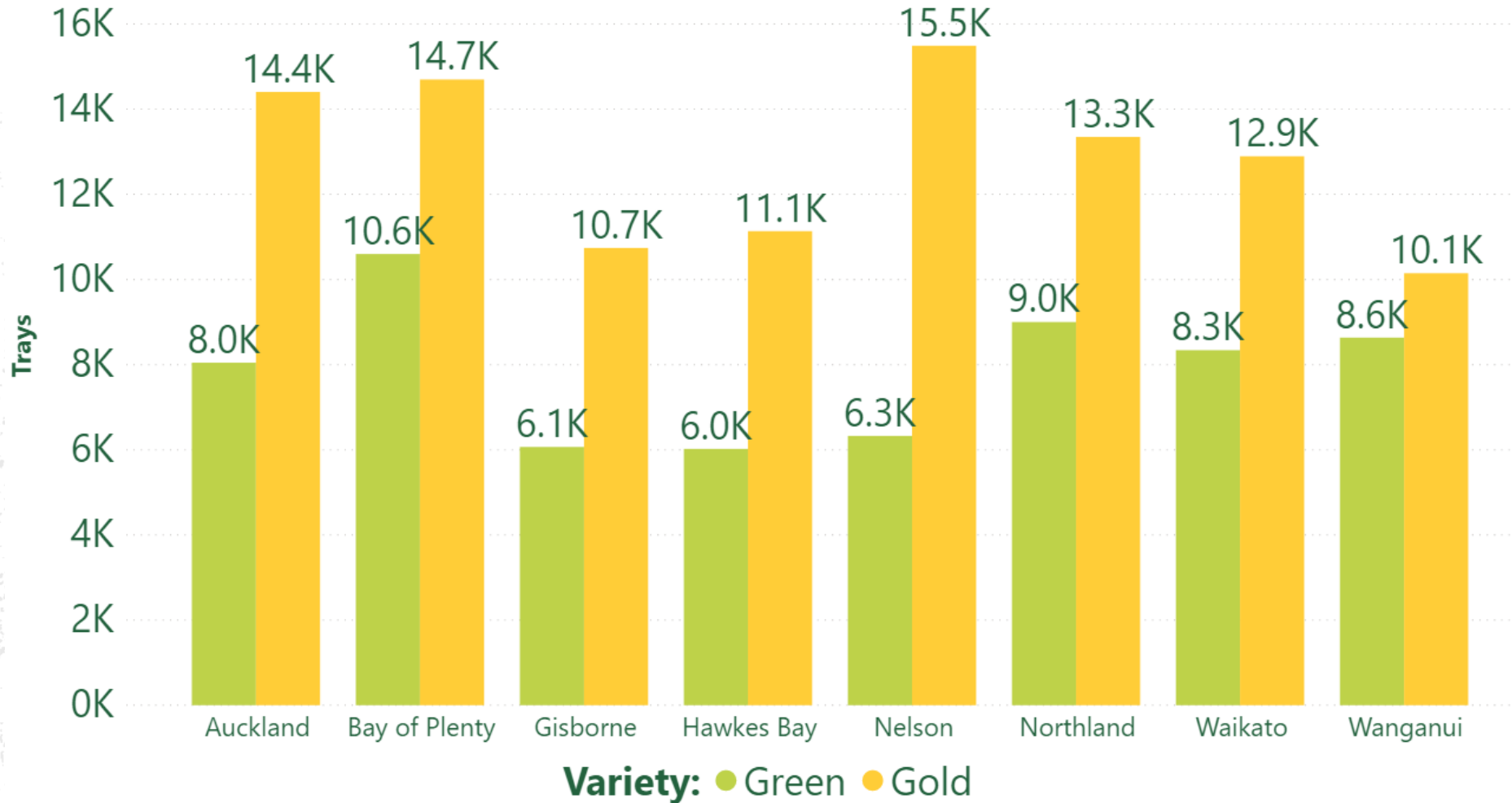
Supply Region	Green	Gold	Red	Total
Auckland	263.6	384.4	2.2	650.2
Bay of Plenty	6117.5	5624.4	34.5	11776.3
Gisborne	42.4	438.7	3.7	484.8
Hawkes Bay	40.9	169.2	0.9	211.0
Nelson	207.7	243.8		451.5
Northland	92.6	544.5	3.4	640.5
Waikato	384.9	246.2	8.9	639.9
Wanganui	74.3	1.5	0.2	76.0
Total	7223.8	7652.6	53.8	14930.2



Variety: ● Green ● Gold ● Red

2020 trays per hectare

Conventional weighted Average by region



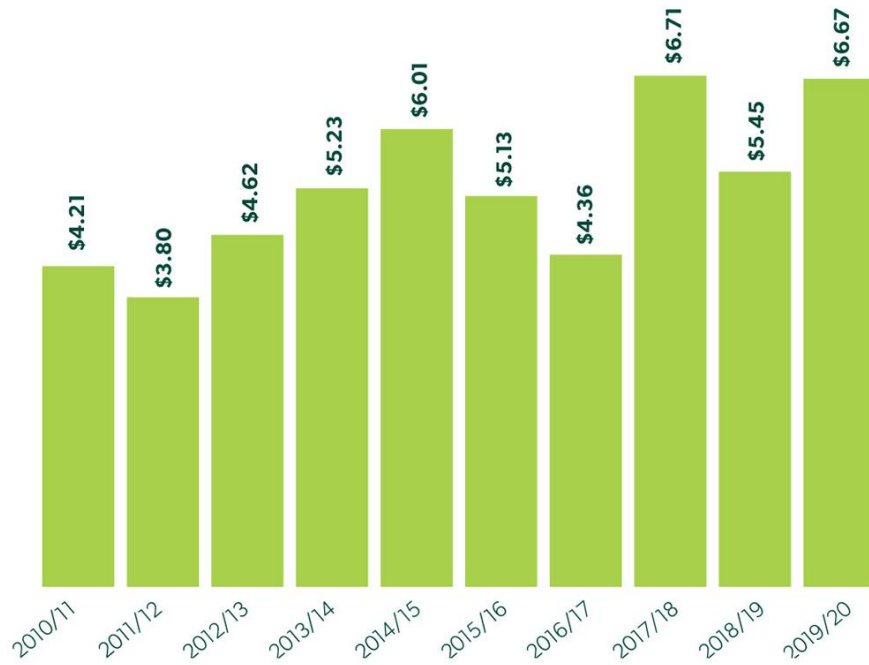
Zespri green kiwifruit

Average orchard gate return: 2019/20

ZESPRI GREEN KIWIFRUIT

New Zealand-grown kiwifruit

\$6.67 AVERAGE ORCHARD
GATE RETURN PER TRAY



\$67,295 AVERAGE ORCHARD
GATE RETURN PER HECTARE

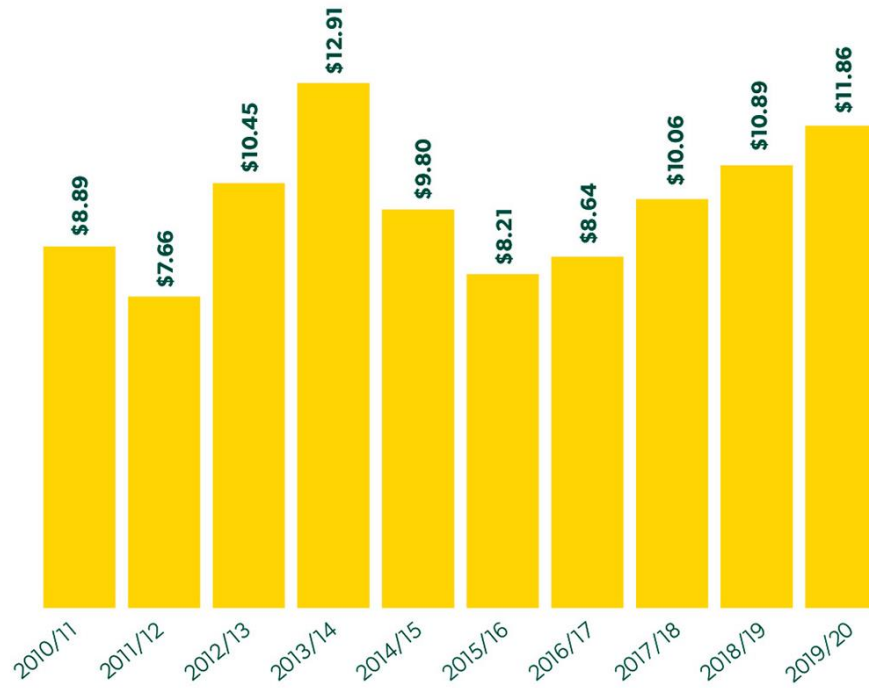


Zespri gold kiwifruit

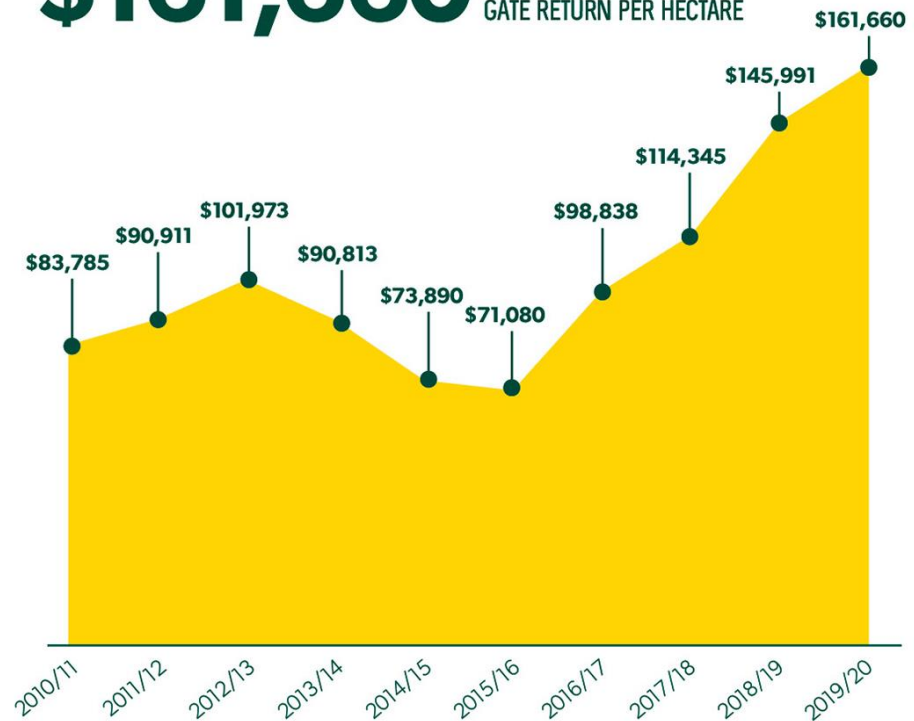
Average orchard gate return: 2019/20

ZESPRI GOLD KIWIFRUIT
New Zealand-grown kiwifruit

\$11.86 AVERAGE ORCHARD
GATE RETURN PER TRAY



\$161,660 AVERAGE ORCHARD
GATE RETURN PER HECTARE



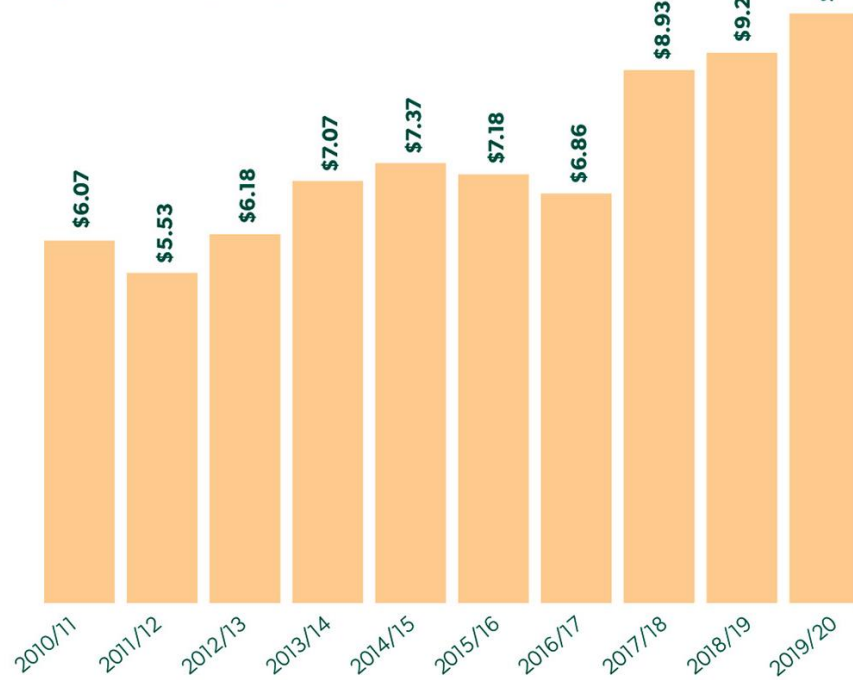
Zespri organic green kiwifruit

Average orchard gate return: 2019/20

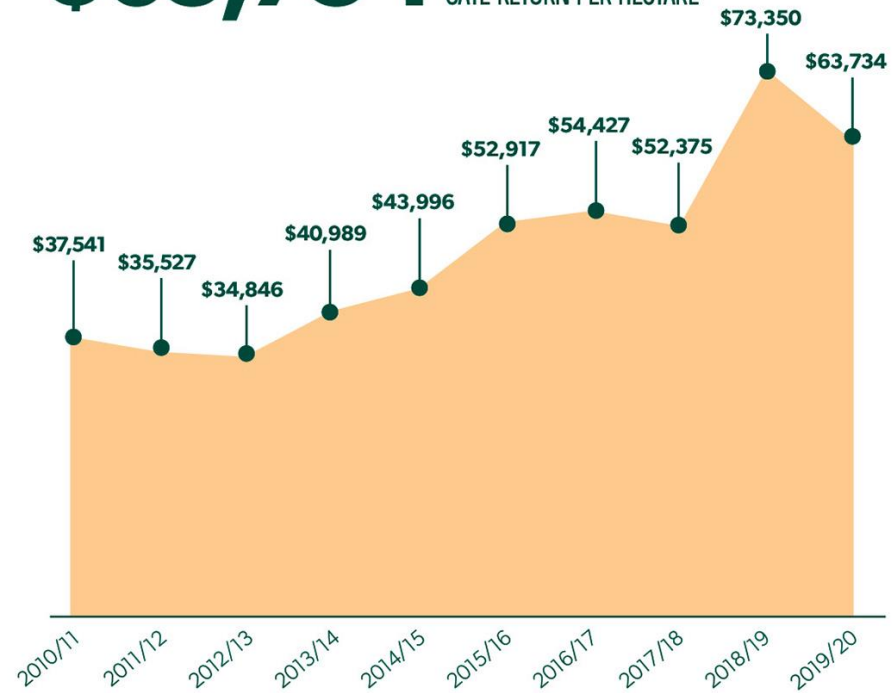
ZESPRI ORGANIC GREEN KIWIFRUIT

New Zealand-grown kiwifruit

\$9.88 AVERAGE ORCHARD
GATE RETURN PER TRAY



\$63,734 AVERAGE ORCHARD
GATE RETURN PER HECTARE





RISKS TO THE PLAN

Grower risk

BIOSECURITY INCURSIONS

**POOR WEATHER OR
POLLINATION**

CLIMATE CHANGE

**INCREASED COMPLIANCE
AND GROWING COSTS**

**LAND / LABOUR / WATER
CONSTRAINTS**

Market risk

LOSS OF MARKET ACCESS

CHANGING REGULATIONS

COMPETITION

**MARKETS DON'T DEVELOP
TO PLAN**

Macro risk

POLITICAL UNCERTAINTY

ECONOMIC UNCERTAINTY

**INTERNATIONAL CRISES
LIKE CORONAVIRUS**

THE TWO OBJECTIVES



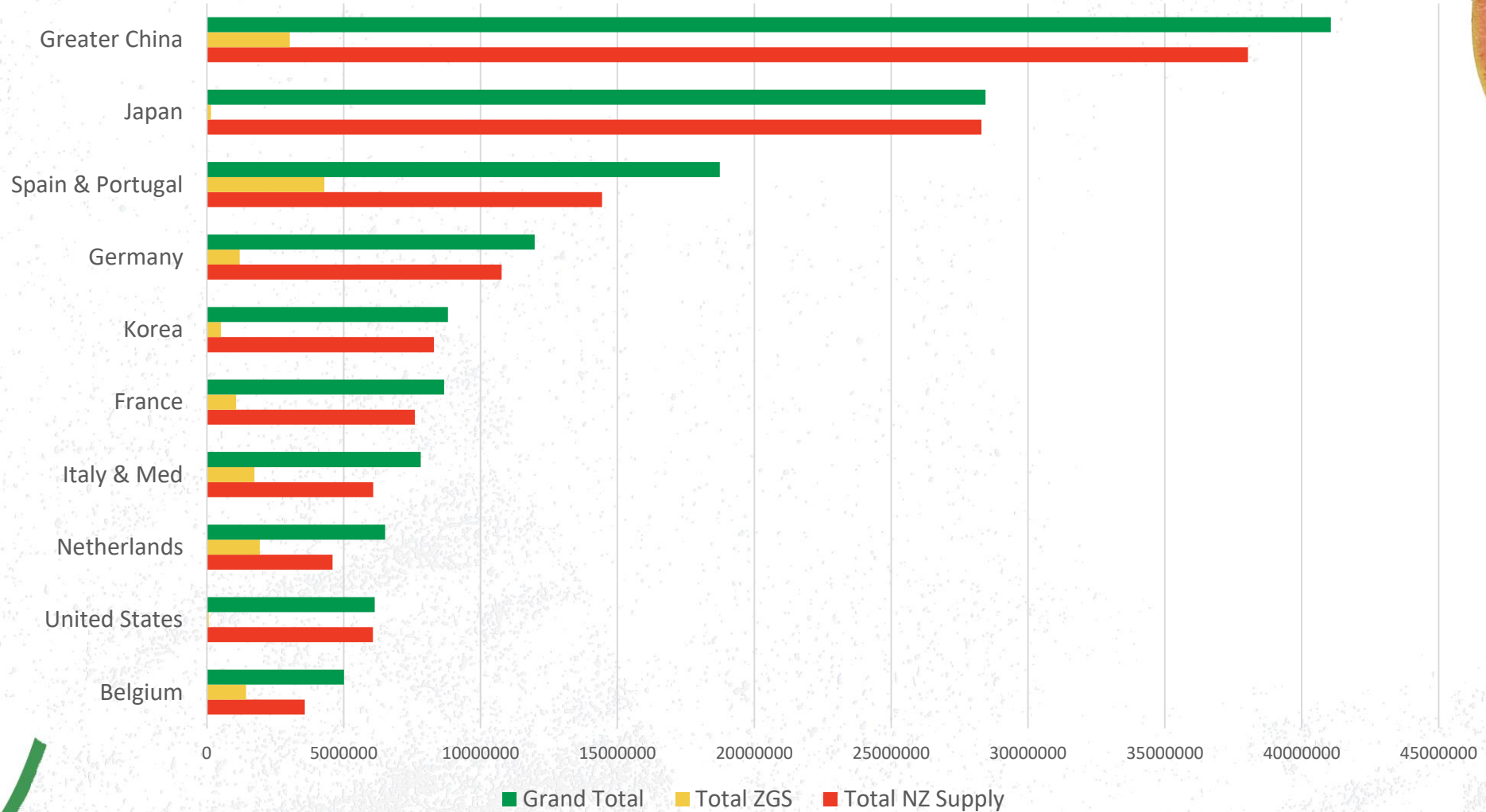
SELLING
Trays



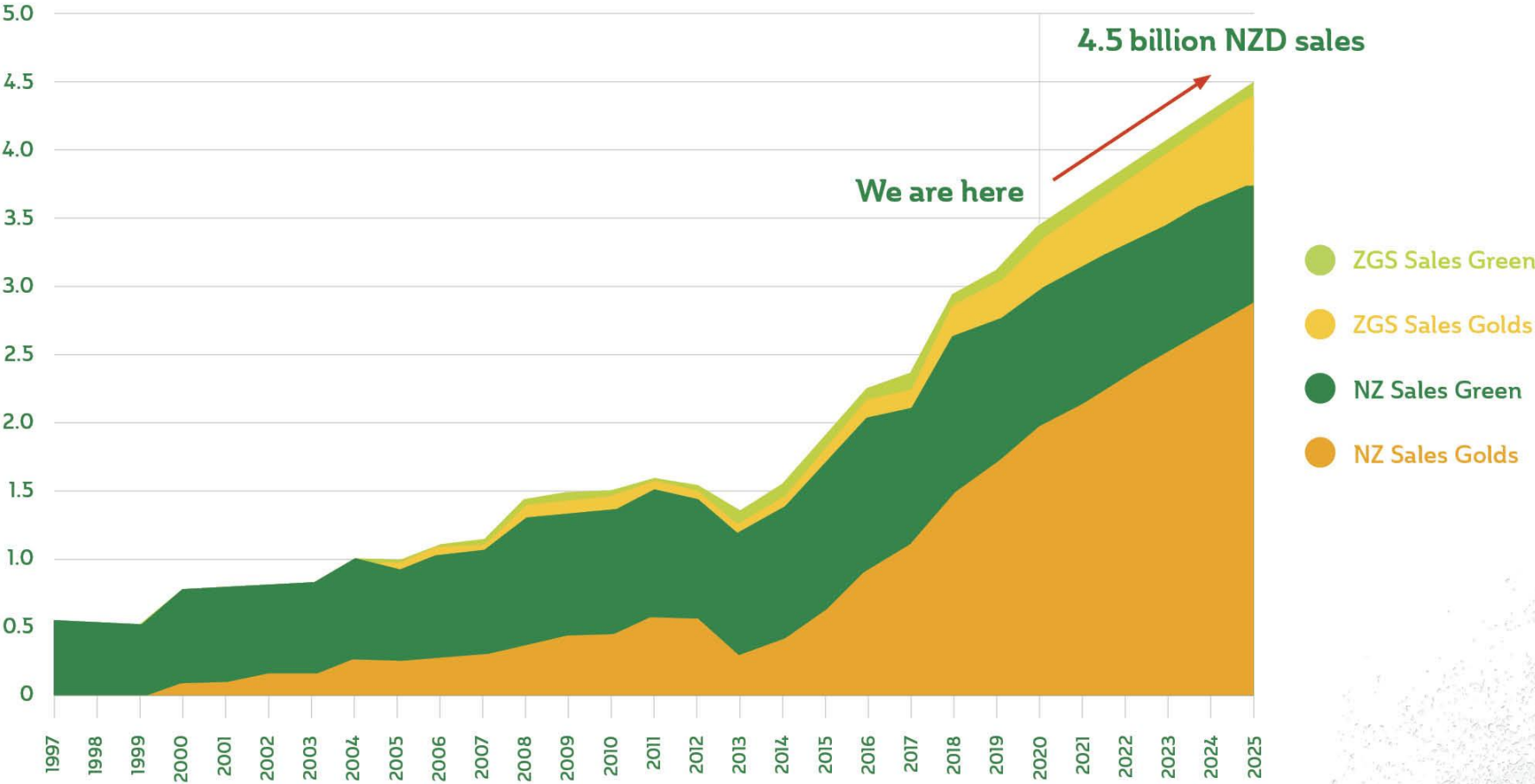
BUILDING
brand



TOP 10 MARKETS 2020

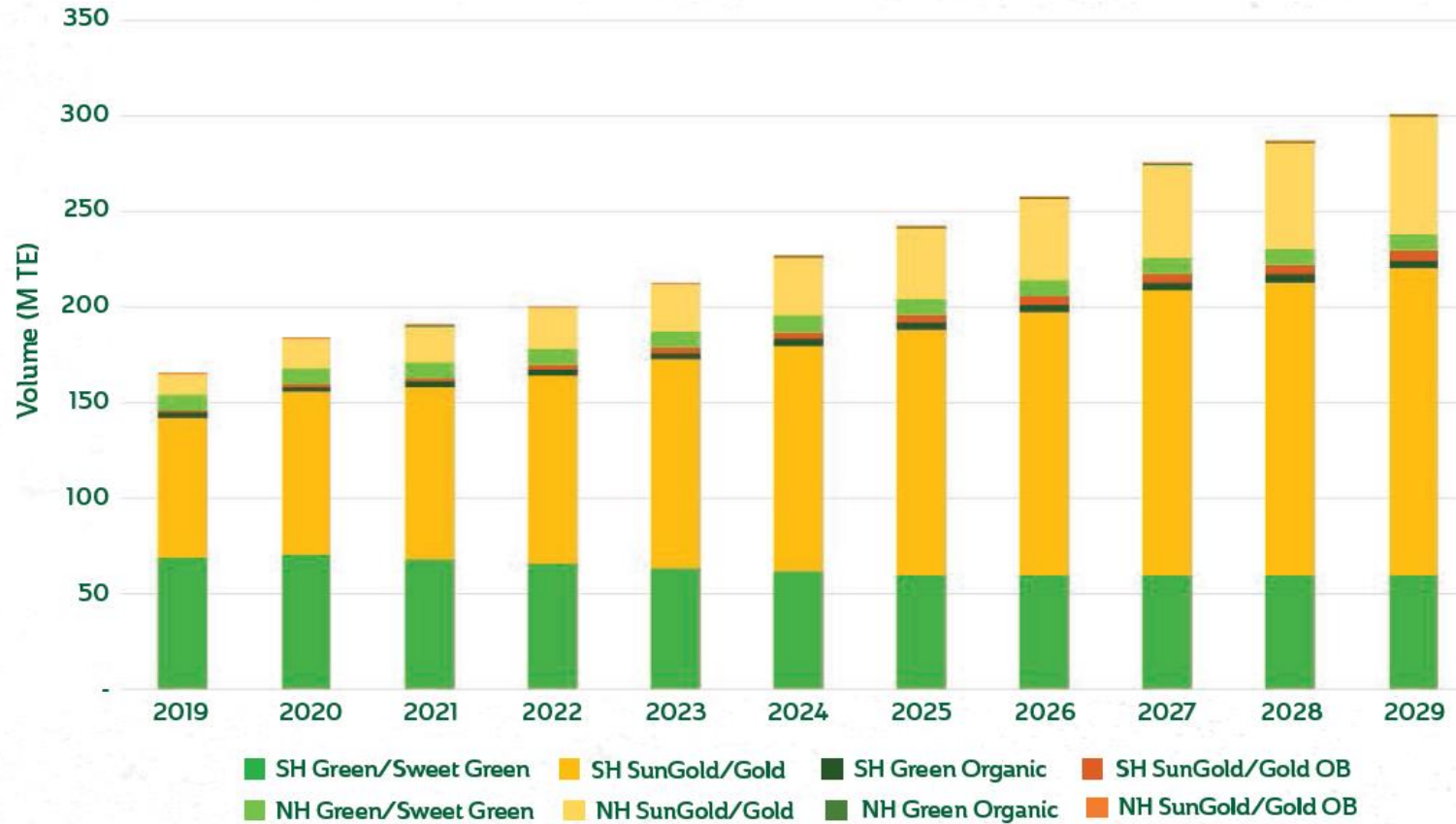


FUTURE GLOBAL REVENUE






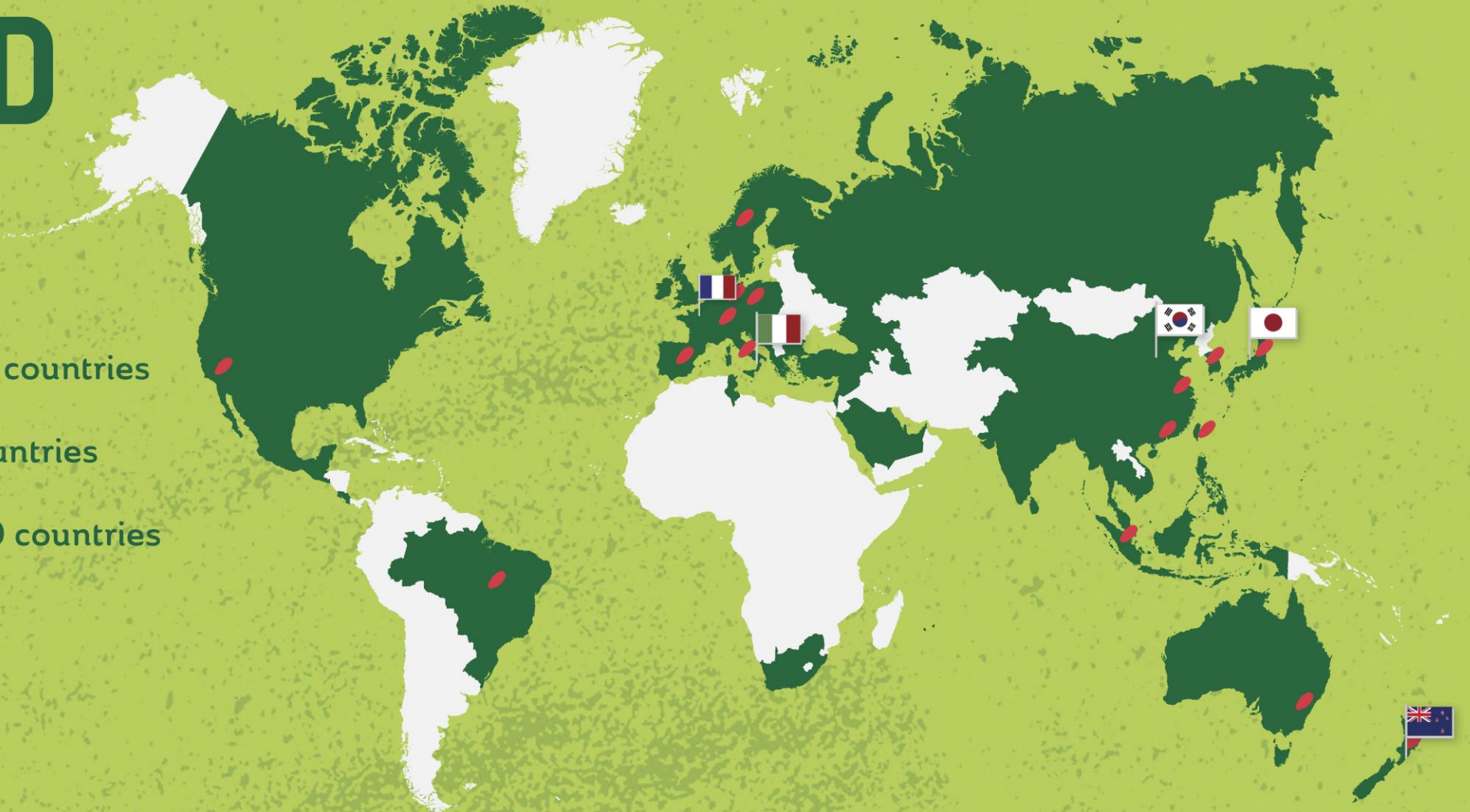
10-year Target Demand

(Volume Growth)



GLOBAL BRAND

-  Production in 5 countries
-  Offices in 17 countries
-  Sales in over 50 countries



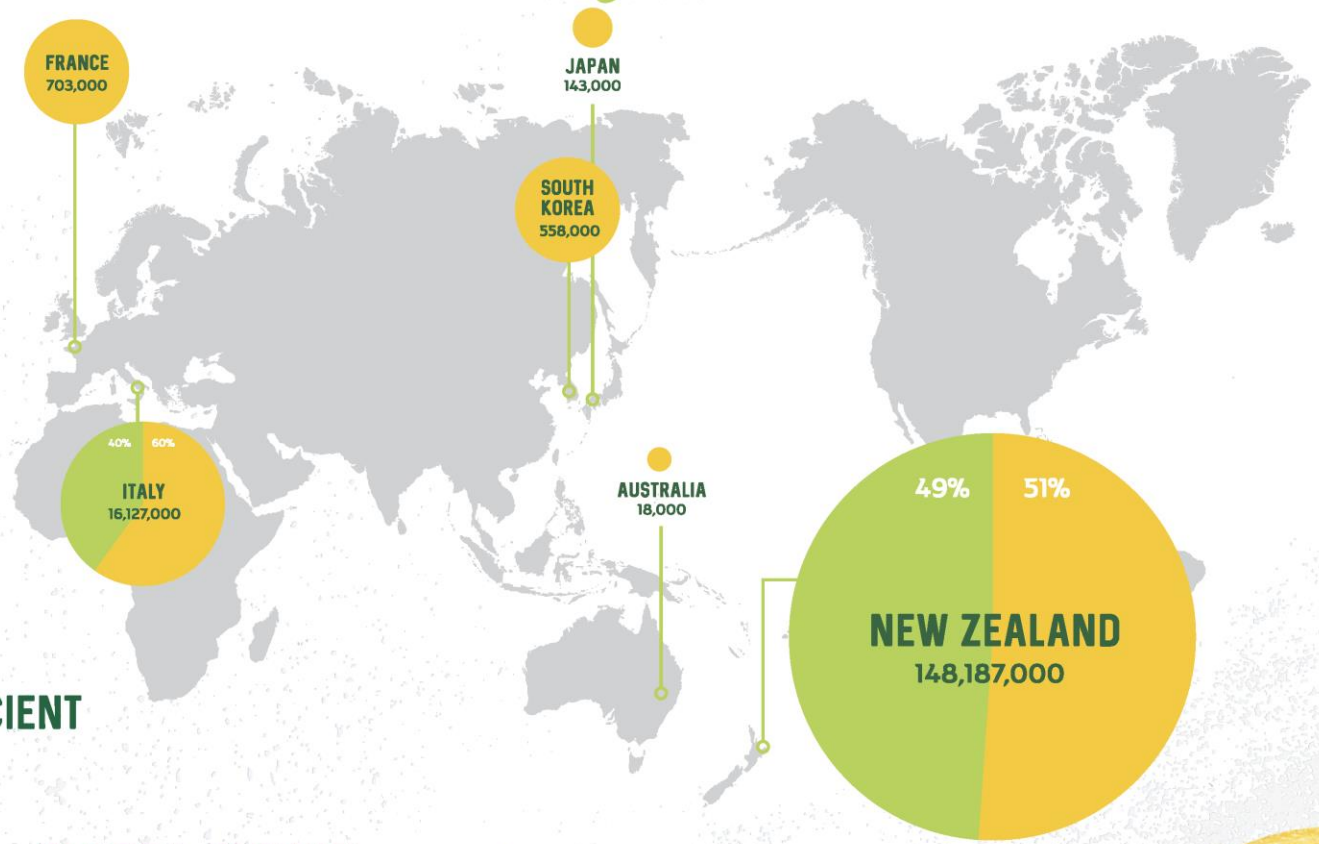
STRATEGY – 12 MONTH SUPPLY

Zespri Global Supply



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



GLOBAL SUPPLY STATISTICS 2019/20

● Percentage of Green trays supplied
● Percentage of Gold trays supplied



PLATFORMS

DEVELOP NEW CULTIVARS

PROTECT SUPPLY

IMPROVE SUSTAINABLE ORCHARD PRODUCTIVITY

OPTIMISE SUSTAINABLE SUPPLY CHAIN DELIVERY

CREATE KNOWLEDGE FOR VALUE ADD

IMPACT

Better Kiwifruit Cultivars Faster

Deliver sustainable pest & disease control and fruit safe to eat

Produce a premium crop in every orchard

Deliver the Optimal Eating Experience

Increasing users and usage in all markets through tailored communications for example, health and nutrition

NEW CULTIVARS

VALUE CHAIN

VALUE ADD

INNOVATION INVESTMENT



WORLD'S LARGEST KIWIFRUIT BREEDING *Programme*

Zespri in partnership with Plant & Food Research has the largest kiwifruit breeding programme in the world.

THERE ARE OVER
100,000 FEMALE
SEEDLINGS.



PRODUCT
CONCEPTS

ORCHARD

SUPPLY
CHAIN

MARKET



Questions?



JIT

Zespri

VEGE

Z

Kiwifruit



Kiwifruit

fruit

Kiwifruit

Kiwifruit

Kiwifruit

M