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Report Name: New Zealand Kiwifruit Sector

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Report Highlights:

New Zealand's kiwifruit industry remains one of the country's most valuable horticultural sectors. In the 2024/2025 season, the industry achieved record global sales and direct returns to producers, supported by strong production volumes and the global reach of its principal marketer, Zespri. FAS/Wellington forecasts production to increase by almost one percent to 800,000 metric tons (MT) for the coming harvest in the 2025/2026 market year (MY). If this production level is realized, it will represent the highest yields on record. In MY 2024/2025, exports increased 44 percent over the previous year. The European Union is the largest market for New Zealand kiwifruit at 32 percent, followed by China, Japan and the United States. Trade access and tariff developments, including recent free trade agreements, are reshaping market conditions and reducing barriers in key markets.

Executive Summary

New Zealand's kiwifruit industry remains one of the country's most valuable horticultural sectors. In the 2024/2025 season, the industry achieved record global sales and direct returns to producers, supported by strong production volumes and the global reach of its principal marketer, Zespri. This comes after two challenging seasons marked by labor shortages, fruit quality issues, adverse weather events, and reduced crop volumes.

FAS/Wellington forecasts production to increase by almost one percent to 800,000 metric tons (MT) for the coming harvest in the 2025/2026 market year. If this production level is realized, it will represent the highest yields on record. Recent reports from industry and the Ministry of Primary Industries (MPI) forecast that yield per hectare will grow, as more recently expanded hectares of orchards mature and bare more fruit in addition to greater seasonal labor availability and favorable weather conditions.

In MY 2024/2025, exports increased 44 percent over the previous year to represent the largest export year to date at almost 767,620 MT. The European Union (EU) represented the largest market for New Zealand kiwifruit at 32 percent, followed by China (27 percent), Japan (14 percent) and the United States (6 percent).

Kiwifruit exports remain one of the most valuable fresh produce categories, contributing more than NZ$4.5 billion (US$2.6 billion) Free on Board (FOB) to New Zealand's total fresh fruit exports in MY 2025/2026. Trade access and tariff developments, including recent free trade agreements, are reshaping market conditions and reducing barriers in key markets, particularly in the United States, EU and India.

Note: The GAIN Marketing Year (MY) is recorded as a split year, beginning July to end of June the following year. Written with the first year of the split year e.g. 2025/2026 MY . For the purpose of this report always refer to MY unless otherwise stated. For foreign exchange rate between New Zealand Dollar and United States Dollar, the rate used in this report is NZ$ 1.00 = US$ 0.58.

Background

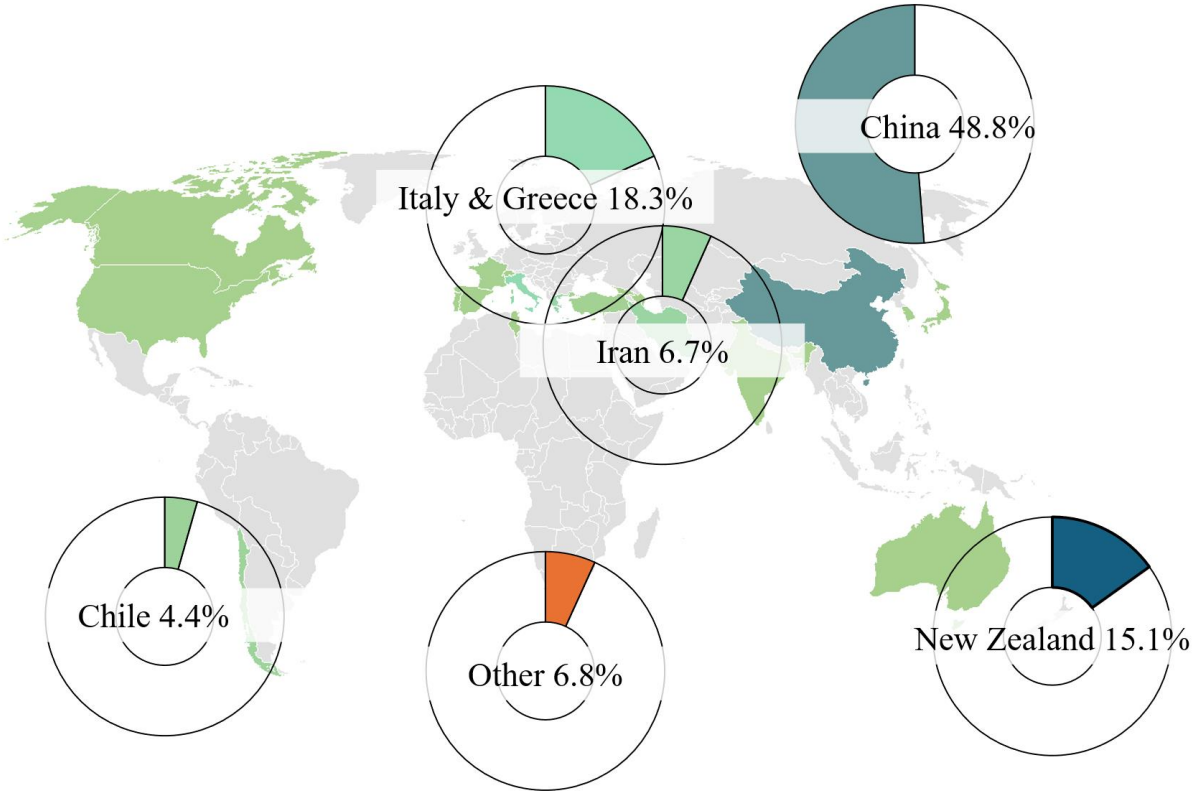
The history of New Zealand kiwifruit began in 1904, when Mary Isabel Fraser, a school principal, brought back some Chinese gooseberry seeds from China. These seeds were given to a farmer who planted them near the riverine town of Whanganui. The vines went on to bear their first fruit in 1910. Around the same time these first seeds were introduced to New Zealand, the species was also experimented with as a commercial crop both in the United Kingdom and the United States. However, there was little to no success for the British and U.S. attempts with bearing fruit. Kiwifruit vines grow best in frost-free environments with substantial water and protection from strong winds.

During the Second World War, U.S. troops stationed in New Zealand reportedly developed a taste for the fruit, resulting in new international demand. In 1959, exporters rebranded the produce to "Kiwifruit" for export to the United States, avoiding Cold War connotations and increased scrutiny for quarantine as a

result of the name – Chinese gooseberry exports from New Zealand. The name is derived from a Kiwi, which is the national bird of New Zealand.

As reported by Food and Agricultural Organization of the United Nations, kiwifruit is grown commercially in 25 different countries (Figure 1). China is the largest producer of kiwifruit (48.8 percent), followed by New Zealand (15.1 percent), Italy (10.5 percent) and Greece (7.7 percent). Although it is the second largest producer of kiwifruit New Zealand is its largest exporter, accounting for over 65 percent of global exports.

Figure 1: 2024 Global Kiwifruit Production



Source: Food and Agricultural Organization of the United Nations

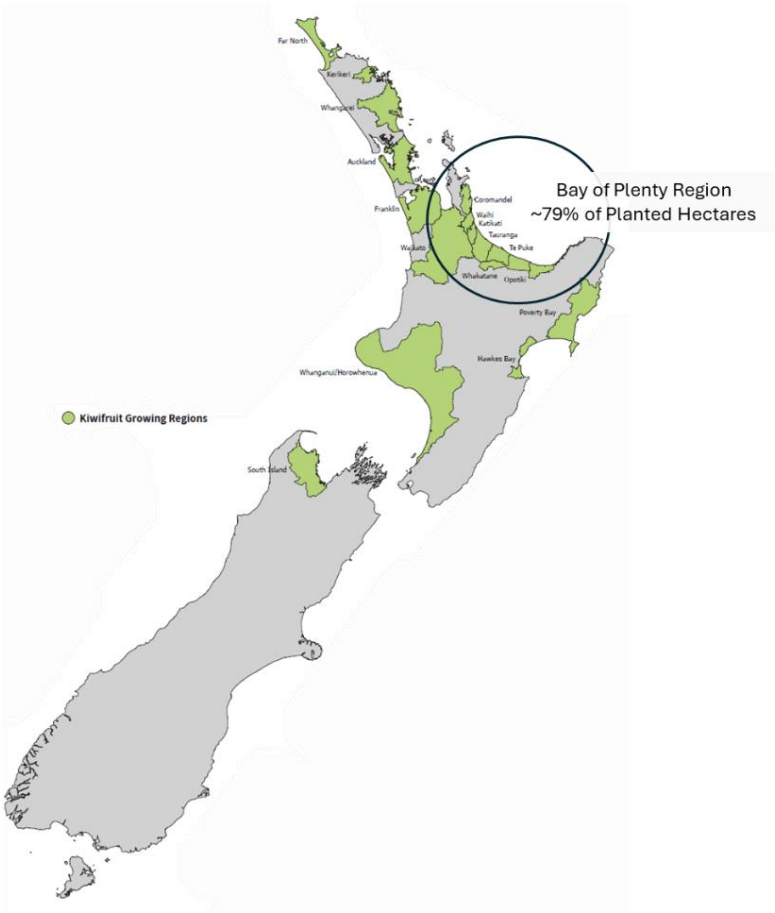
The kiwifruit industry is the largest sector in New Zealand's horticulture industry. There are currently over 2,800 kiwifruit growers, who produce on 14,500 hectares of orchards. According to the December 2025 Situation Outlook for Primary Industries (SOPI) published by MPI, kiwifruit export revenue is expected to rise for the year ending June 2026 from NZ$4 billion (US$2.3 billion) to NZ$4.3 billion (US$2.5 billion).

The Bay of Plenty Region is the largest primary kiwifruit production area (principally Katikati, Te Puke, Tauranga, Ōpōtiki and Whakatāne), producing approximately 79 percent of total output (Figure 2).

The country's kiwifruit industry continues to recover from the devastating effects of a bacterial canker disease specific to kiwifruit, *Pseudomonas syringae pv. actinidiae* (PSA). PSA was detected in New Zealand in November 2010 and rapidly caused widespread, severe damage to New Zealand's kiwifruit industry. PSA is a highly contagious bacterial disease that causes vine death in kiwifruit trees, at the time threatening the future of the whole industry. The sector has largely recovered from this due to the planting of gold kiwifruit varieties that are more tolerant to present PSA strains. New strains of PSA in other countries present a biosecurity risk to the kiwifruit sector, which are strictly monitored and managed by industry and MPI.

As a result of the Kiwifruit Industry Restructuring Act 1999, the industry operates under a Single Point of Entry (SPE) model; Zespri is the central marketer, export agent, and global distribution lead for almost all New Zealand kiwifruit exports. Zespri is a private company owned by current and past New Zealand kiwifruit growers, employing around 600 people.

Figure 2: Kiwifruit Growing Regions of New Zealand



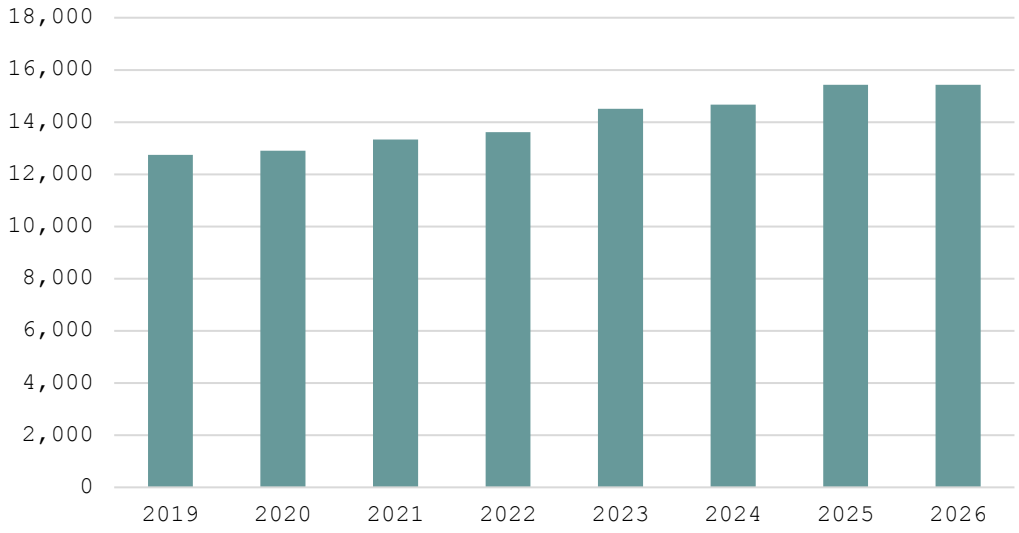
Source: Kiwifruit Vine Health

Planted and Harvested Areas

Planted hectares (ha) for kiwifruit orchards in New Zealand grew at a compounding annual growth rate of 1.4 percent from 2013 to 2026. However, in the last two years, there has been a slowdown in the

incorporation of new hectares at just over 15,400 ha with 2,800 growers. This is due to a reduction in license insurances for new varieties, in addition to land use change with the removal of older Geen varieties in some regions.

Figure 3: Commercial New Zealand Kiwifruit Hectares



Source: Zespri International Limited and Ministry for Primary Industries

Figure 4: Commercial New Zealand Kiwifruit Varieties

Source: New Zealand Horticulture Export Authority

The most common varieties are SunGold, followed by Green (Hayward), and emerging red varieties (Figure 4). The New Zealand kiwifruit industry's 'Hayward' variety ('green' kiwifruit) is the historical variety, which doesn't require a license to be grown commercially.

Golden Kiwifruit, commonly known as SunGold, is strictly licensed by Zespri. There are approximately 7,500 ha of Gold Kiwifruit, farmed conventionally or organic. The cultivar was fast-tracked to commercial launch in response to the identification of PSA in 2010 and is a cornerstone in the PSA recovery pathway and the major driver of the sector's expansion. Golden kiwifruit's strong market performance and orchard gate returns has grown over the last 10 years as Zespri releases continues to grant licenses that expand production area in line with growing demand. In 2020, 150 ha of the new red cultivar or RubyRed licenses were introduced to growers. The new cultivar is subject to provisional plant variety rights (PVR) protection in New Zealand and elsewhere in the world. Since 2020, Zespri have increased hectare licenses for this variety marginally, matching supply with market demand in predominantly Asian markets.

Figure 5: Kiwifruit Orchard – Bay of Plenty

Source: NZ Herald

Production

Table 1: Production, Supply and Distribution – Fresh Kiwifruit

Kiwifruit	2023/2024		2024/2025		2025/2026	
Market Year Begins	July 2023		July 2024		July 2025	
New Zealand	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Area Planted (HA)	0	14512	0	14664	0	15425
Total Production (MT)	0	593070	0	794490	0	800000
Imports (MT)	0	516	0	550	0	500
Total Supply (MT)	0	593586	0	795040	0	800500
Exports (MT)	0	571232	0	767602	0	780000
Domestic Consumption (MT)	0	22354	0	27438	0	20500
Total Distribution (MT)	0	593586	0	795040	0	800500
(HA) ,(MT)						

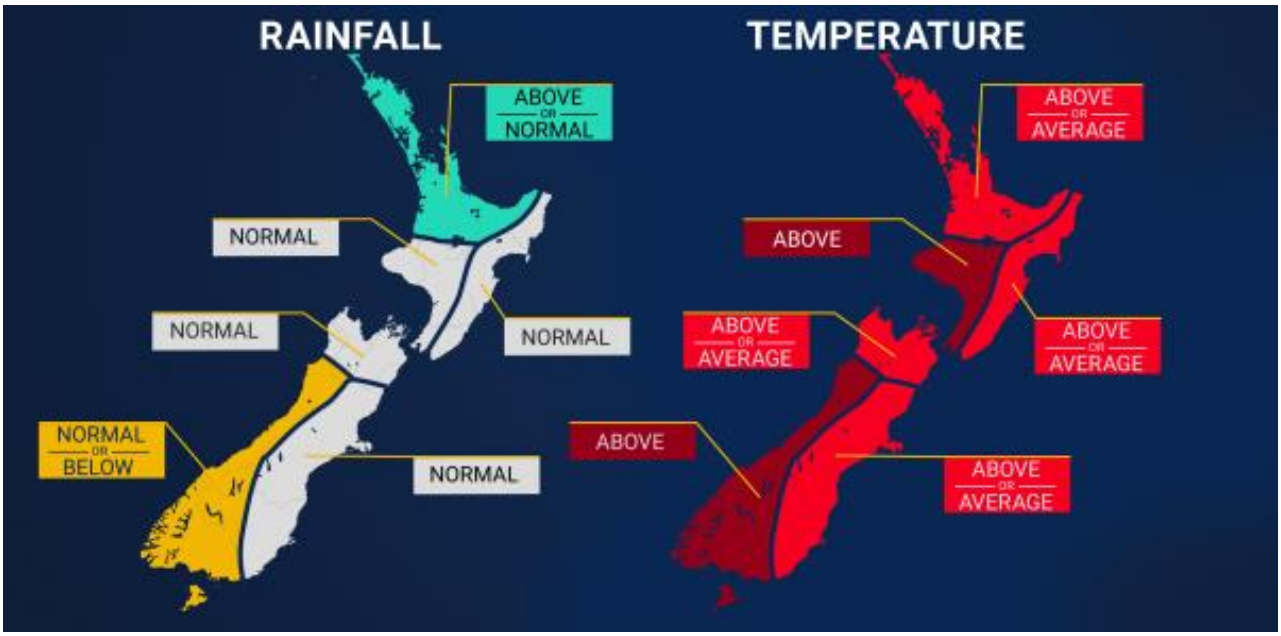
**FAS/Wellington forecast, not official USDA Data*

The harvest season for kiwifruit in New Zealand takes place between February to June. Starting with early varieties like RubyRed, then SunGold, and then green. Fruit is handpicked from the vines and then transported to packing facilities for export or domestic consumption. The major constraints for harvest yield are typically climatic conditions and labor availability.

2025/2026

FAS/Wellington forecasts production to increase by almost one percent to 800,000MT for the coming harvest in MY 2025/2026. Recent reports from industry and MPI forecast that yield per hectare is expected to grow because more recently expanded hectares of SunGold and RubyRed orchards mature and bare more fruit. Leading into the harvest season, Earth Sciences New Zealand expect consistent La Niña conditions, which favor kiwifruit growing regions with vines growing best in frost-free. environments substantial water availability (Figure 6). As such, industry contacts are optimistic about the upcoming harvest due to recent favorable weather patterns.

Figure 6: Summer Climate Outlook



Source: Earth Sciences New Zealand

In the long term, it is expected that production could increase by an additional 10 percent over the next five years. This would result in national production reaching approximately 874,000 MT by 2030.

2024/2025

For MY 2024/2025 harvest, MPI reported that favorable conditions resulted in a record crop of high-quality fruit. The New Zealand kiwifruit industry and MPI report production in Tray Equivalents which is approximately 3.6 kilograms of kiwifruit per tray. FAS/Wellington estimates production at 794,490 MT in MY 2025/2026. This is followed by two challenging seasons marked by labor shortages, fruit quality issues, adverse weather events, and reduced crop volumes. During this period, there were also changes to rules on dormancy-breaking chemical use, which has led to a substantial improvement in vine yield.

--Increase in Seasonal Labor Availability:

Similarly to what has been reported in FAS/Wellington's Deciduous Fruit Annual, availability of staff during harvest and packing has a significant impact on kiwifruit production, particularly harvest operations. The Recognized Seasonal Employer (RSE) visa permits the employment of staff from eligible nations, predominantly Pacific nations, to work in New Zealand in the horticulture and viticulture industries. These visas are only seasonal with a limited number available each year. With the high labor requirements during the harvest periods, many commercial operations and packhouses critically rely on RSE staff, in addition to overseas backpackers and part time workers.

The RSE scheme has an administrative limit, or cap, on the number of RSE roles that can be taken up in a year. Since the change in government in 2023, the new coalition government has lifted the number of RSE visas from 19,500 to 20,750 in the 2025/2026 MY, in addition to announced plans to increase the cap further in coming years.

--Continued use of Dormancy-Breaking Chemicals:

The use of chemicals for breaking dormancy and increasing the formation of buds on plants like kiwifruit, lead to a substantial increase on yield (approximately double) and orchard gate returns in New Zealand. In 2021, the New Zealand Environmental Protection Authority (EPA) launched a proposal for five-year phase out of dormancy-breaking chemicals, such as hydrogen cyanamide. This decision was following a report from the European Food Safety Authority, which prompted the EPA to open a public call for information about the use of hydrogen cyanamide, in conjunction with the decision to phase out its use.

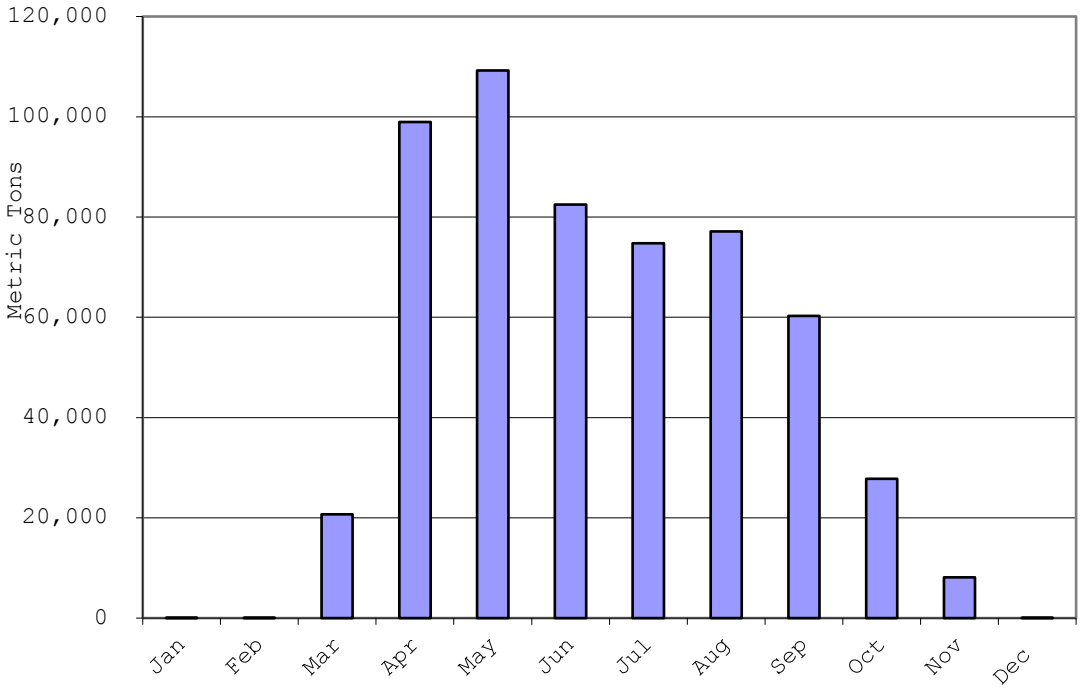
In 2023, FAS/Wellington met with Zespri and kiwifruit growers, who all expressed their concerns about the negative economic impact the phase-out would have on their operations. In addition to noting that products containing hydrogen cyanamide are restricted to commercial use and can only be used by trained professionals who must follow strict rules when spraying. The Government of New Zealand received a significant number of submissions at the hearing and during the reassessment process. In 2024, the committee decided to approve the continued use of hydrogen cyanamide because it found the benefits outweigh the potential risks.

Exports

New Zealand is the second largest producer of Kiwifruit in the world (15.1 percent), after China (48.8 percent). However, it represents 65 percent of global export volumes to international markets, followed by European Union (16 percent), Chile (14 percent), and China (3 percent).

As seen in figure 7, exports for kiwifruit in New Zealand occur almost entirely between March and November each year. With April/May being the highest months on average for volumes exported at 17.7 percent and 19.5 percent, respectively.

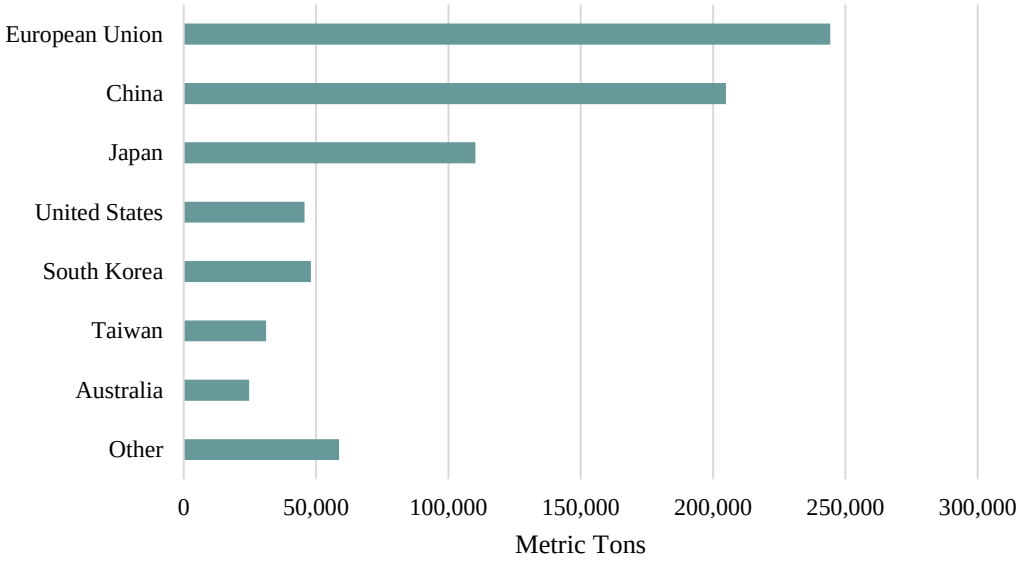
Figure 7: Monthly Average Kiwifruit Export Volumes (Calendar Year)



Source: Trade Data Monitor LLC

In the 2024/2025 MY, exports increased 44 percent year-on-year to represent the largest export year to date at almost 767,620 MT. The EU represented the largest market for New Zealand kiwifruit at 32 percent (Figure 8), followed by China (27 percent), Japan (14 percent) and the United States (6 percent). In MY 2024/2025, New Zealand exported to 55 different countries around the world. In 2024/2025 MY, exports grew in in all markets by volume, particularly by 33 percent in the United States.

Figure 8: 2024/2025 Market Year Kiwifruit Export Volumes



Source: Trade Data Monitor LLC

Kiwifruit exports remain one of the most valuable fresh produce categories, contributing more than NZ$4.5 billion (US$2.6 billion) Free on Board (FOB) to New Zealand's total fresh fruit exports in calendar year 2025. This is significantly higher compared to fresh apples, which in the same year also achieved record export values of NZ$1.2 billion (US$700 million).

Trade Policy

New Zealand's broad network of trade agreements including the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) supports preferential tariff treatment for kiwifruit and other agricultural products into multiple key markets. Under CPTPP, most tariff lines for New Zealand goods are scheduled for elimination, improving competitive positioning in markets such as Peru, Canada, and Mexico compared with non-FTA competitors.

United States Tariff Developments

In late 2025, the United States government removed additional reciprocal tariffs that had been introduced on agricultural products, including kiwifruit, which had generated uncertainty and potentially higher landed costs for exporters earlier in the year. Although tariffs remain on other New Zealand exports, the removal of the tariff on kiwifruit will provide exporters with greater stability.

New Zealand–European Union Free Trade Agreement

The New Zealand–EU Free Trade Agreement (FTA) entered into force on May 1, 2024. Under this agreement, tariffs on kiwifruit exports to the EU were eliminated immediately upon implementation. Prior to the FTA, EU tariffs on kiwifruit were 8-8.8 percent, which represented one of the higher tariffs faced by New Zealand exporters to this market.

Industry sources indicate that the removal of these tariffs has supported export growth into EU markets, reducing the cost burden on exporters and enhancing the competitiveness of New Zealand fruit relative to non-FTA competitors.

New Zealand–India Free Trade Agreement

In December 2025, New Zealand and India concluded an FTA that includes preferential market access for kiwifruit. Under the agreement:

- A quota of up to ~15,000 MT per year will enter India tariff-free, in contrast to current high tariff levels (30 percent).
- Above the quota, kiwifruit imports into India will face a reduced tariff of 16.5 percent instead of the previous higher level.

This tariff reduction is expected to relieve constraints on New Zealand exports to India, which had been heavily limited by tariff costs and will provide a clearer framework for expansion.

Remaining Tariff Barriers

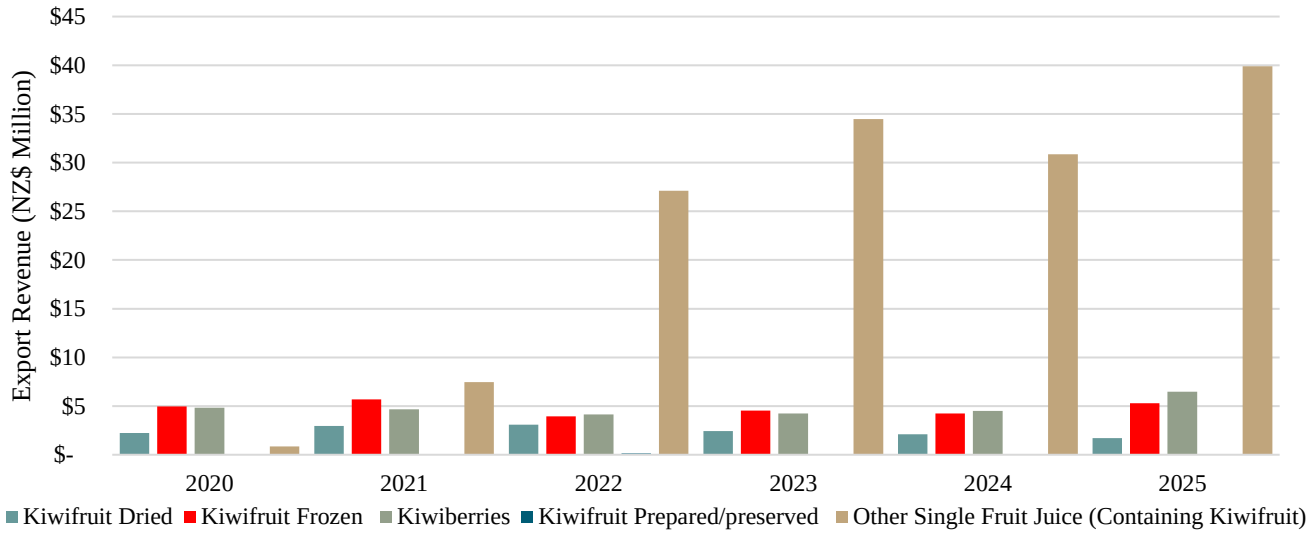
While tariffs have been eliminated or reduced in several key markets through trade agreements, some tariff barriers remain outside FTA contexts. Prior to the EU FTA, EU tariffs materially increased landed costs, Prior to the India FTA, high tariffs similarly constrained shipments to that market. Tariffs remain in other markets without comprehensive FTAs, though most key kiwifruit export destinations have relatively low tariffs or preferential trade frameworks in place.

Consumption and Other Exports

As a result of New Zealand's small population of 5.3 million, paired with the high international demand, consumption in relation to fresh exports remains a small portion of the industry (in volume). FAS/Wellington estimate that domestic consumption of fresh kiwifruit at around 10,000 MT per year, with the remaining volume directed into further processing or other exports. This includes juice, fruit, frozen and preserved Kiwifruit (Figure 9).

Since 2020, there has been a substantial increase in exports for other single ingredient fruit juice exports from New Zealand to predominantly Japan and the United States. There is currently no Harmonized System Code for kiwifruit juice, unlike most other fruits, vegetables or nuts which have specific codes. It is likely that kiwifruit juice has been a substantial contributor in the growth of this export, resulting in revenues of nearly NZ$40 million (US$23.2 million) in the last calendar year.

Figure 9: Non-Fresh Kiwifruit Export Revenue (FOB)



Source: Trade Data Monitor LLC

In addition, New Zealand exports kiwiberries to global specialty markets, these are much smaller than the commercial varieties of kiwifruit in size similar to table grapes. Although small in volume, in the 2025 calendar year, export revenues increased 34 percent to NZ$6.5 million (US3.8 million). The United States is the largest customer, importing over 50 percent of total exports.

Imports

Kiwifruit imports are on average 600 MT each year. These imports are sourced predominantly from Italy and the United States to supply consumers in the months leading up to harvest (October to March) as domestic supplies decrease. These are typically green or haywards varieties that are imported to New Zealand.

HS Code	Product Description
081050	Kiwifruit Fresh
081340	Kiwifruit Dried
0811901941	Kiwifruit Frozen
0810900055	Kiwiberries
2008991131	Kiwifruit Prepared/preserved
20098990	Other Single Fruit Juice (Containing Kiwifruit)

Attachments:

No Attachments.