

阳光鲜活
多汁多彩

Zespri
New Zealand Kiwifruit
佳沛新西兰奇异果

阳光金果 = 圆头喔!

新品种

营养密度 = 苹果 10 倍

The advertisement features a vibrant green background. In the center, a family of three (a man, a woman, and a child) are shown from the chest up, with their arms raised in a joyful gesture. They are surrounded by splashing water. In the foreground, two large, sliced kiwifruits are displayed, showing their bright yellow flesh and black seeds. The Zespri logo is visible on the kiwifruit slices. To the right, a whole kiwifruit is shown with the Zespri logo and the text 'SunGold Kiwifruit'. The overall theme is freshness and health.

An Integrated Supply Chain Approach to Quality



Presentation outline

- Who is Zespri and what do we do?
- What are ZESPRI's motivations to innovate?
- What gives us the strength to innovate?
- What innovation achievements have occurred to date?
- How do we know we are going in the right direction?



NZ Kiwifruit Industry

- World's largest kiwifruit marketer
- 2,700 growers
- 14,000 hectares
- 53 markets
- Recognised ZESPRI Brand
- Global revenue NZ\$1.3b
- 330,000 tonnes / 100,000 trays

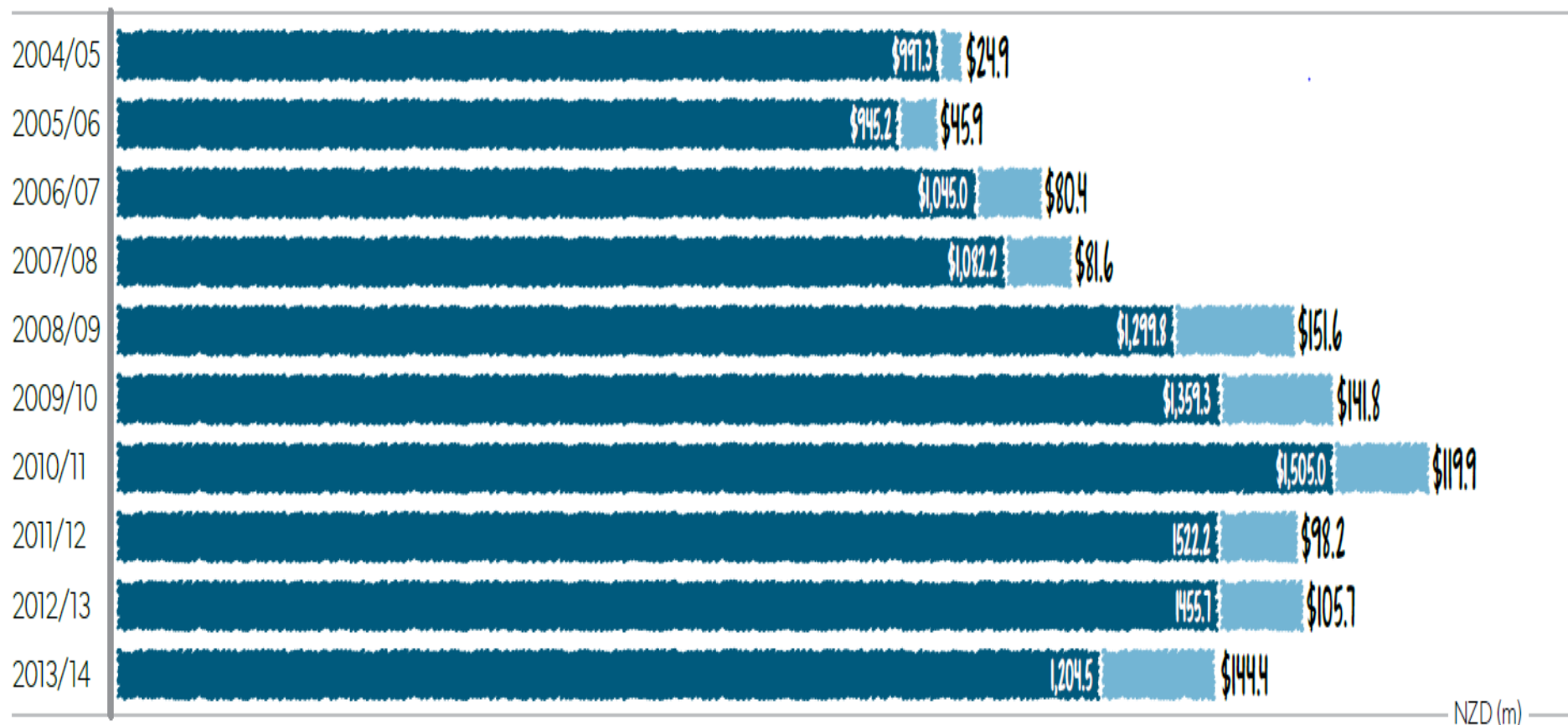


The Zespri Brand family





Global kiwifruit sales by Zespri



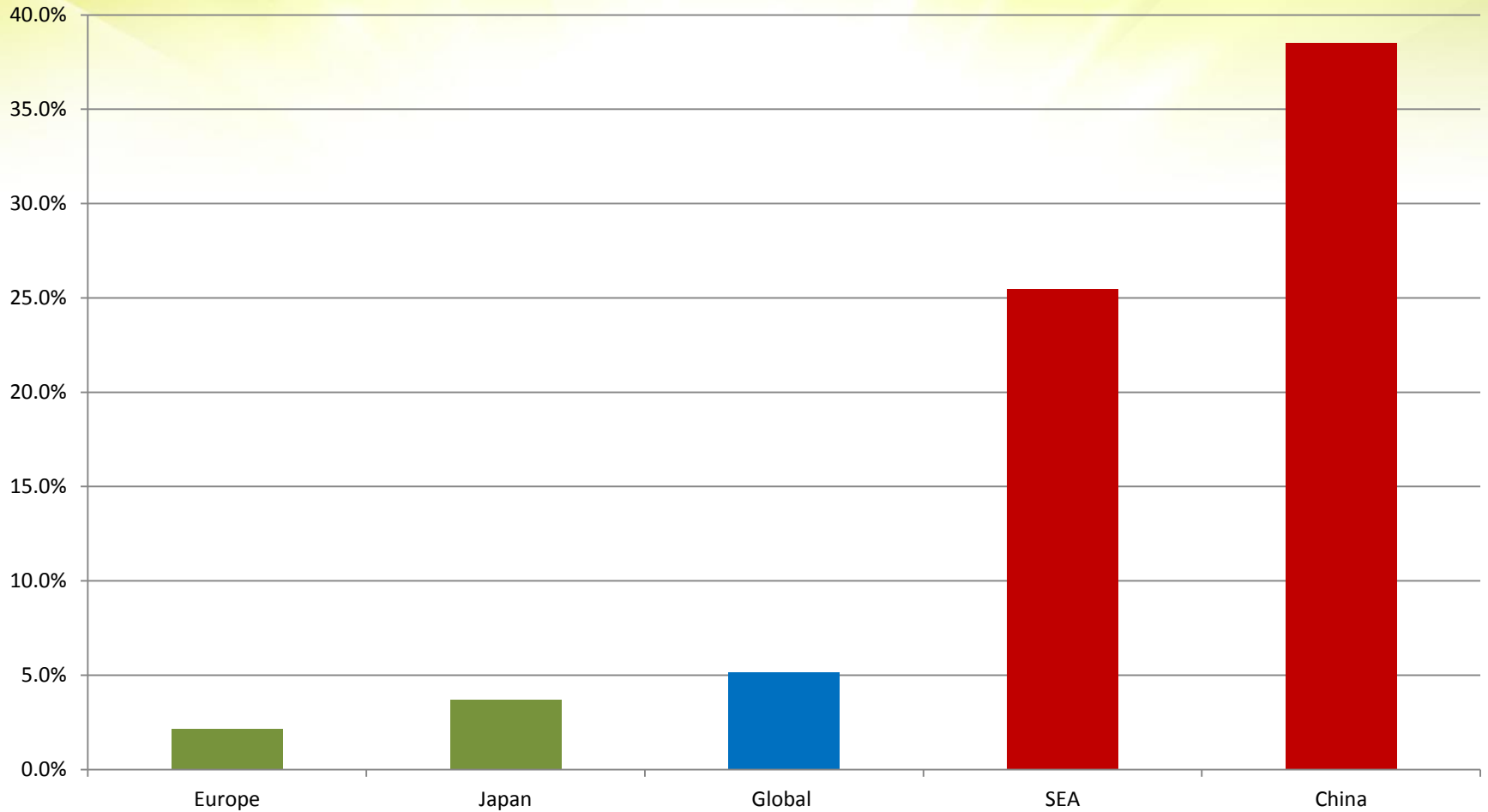
NZD (m)

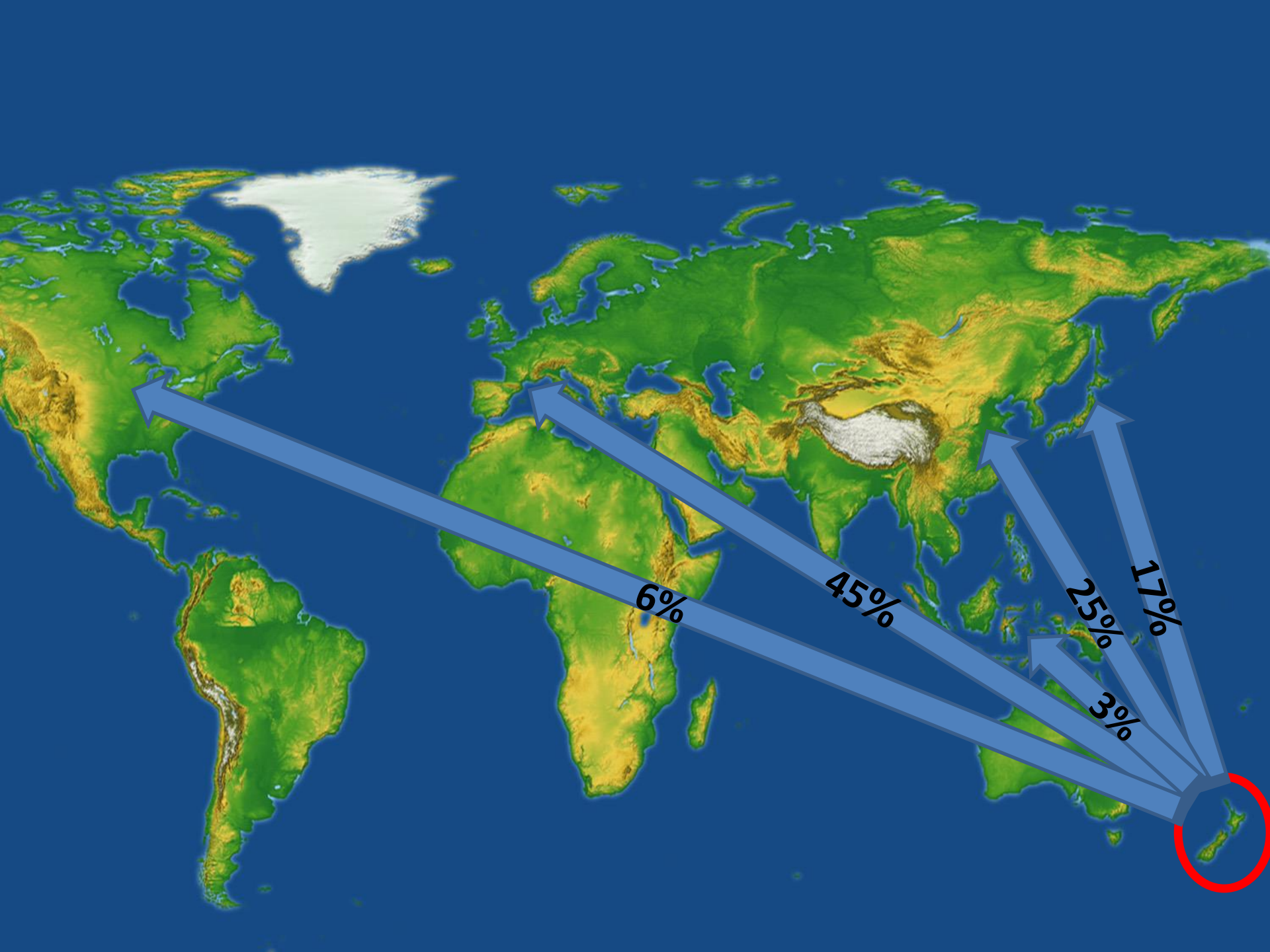
New Zealand-grown kiwifruit Non-New Zealand-grown kiwifruit

NZ FRS figures to 2005/06 and NZ IFRS figures from 2006/07



10-year growth rate





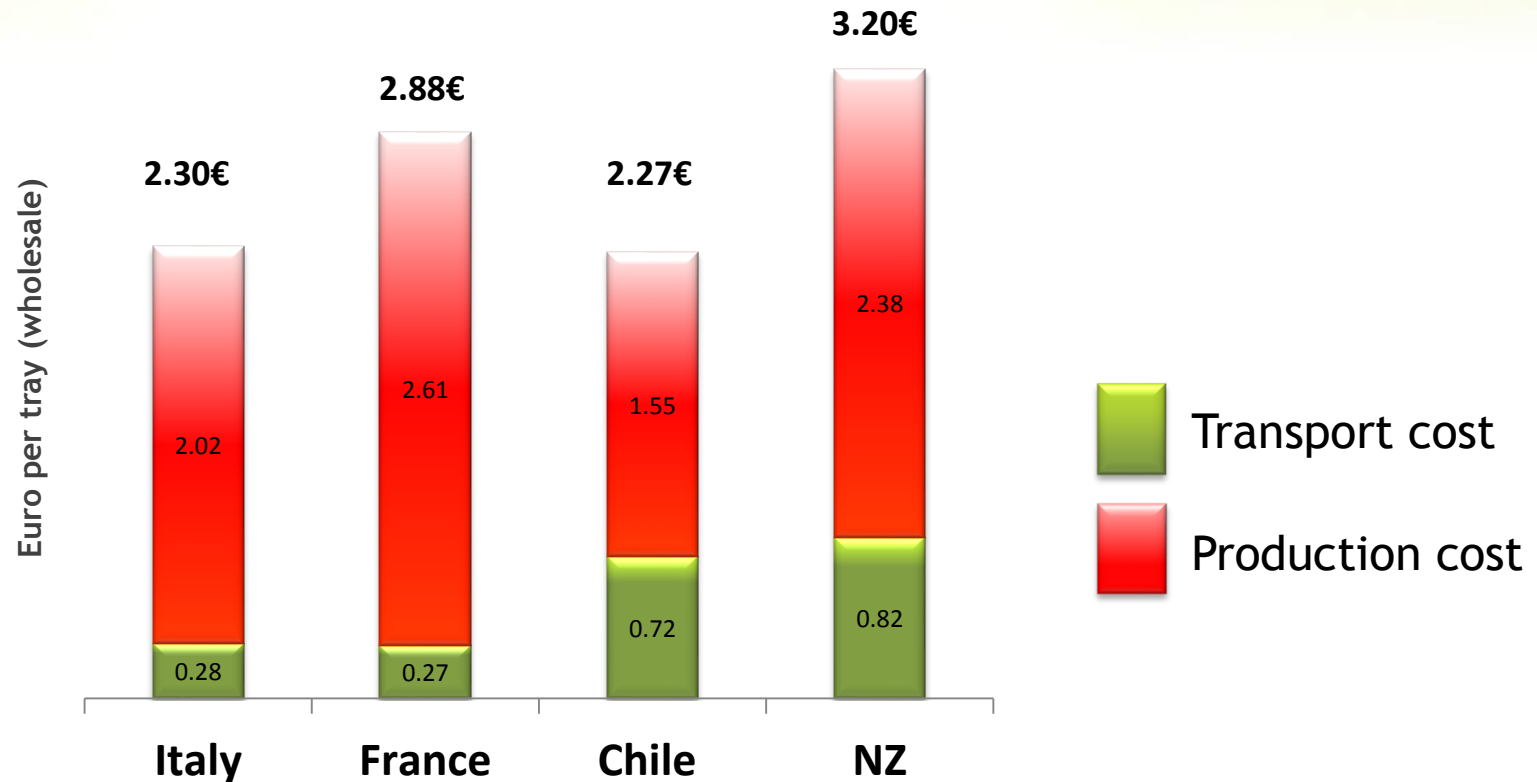


SUCS DE
Fruta
100%
NATURAIS
2.50

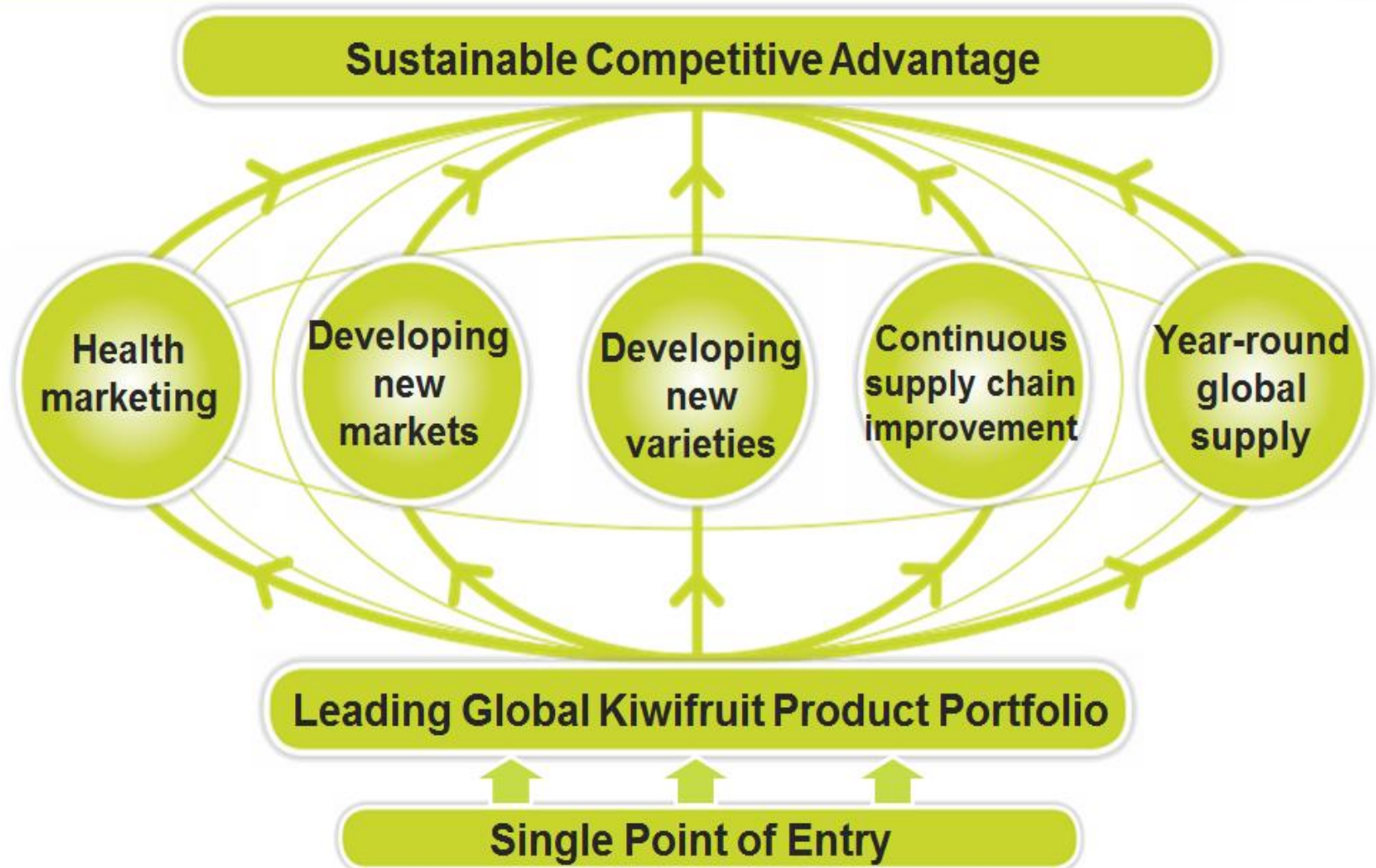


NZ Kiwifruit cannot win the price war

Cost per tray of Hayward delivered to **Spain**



Zespri's long-term strategy



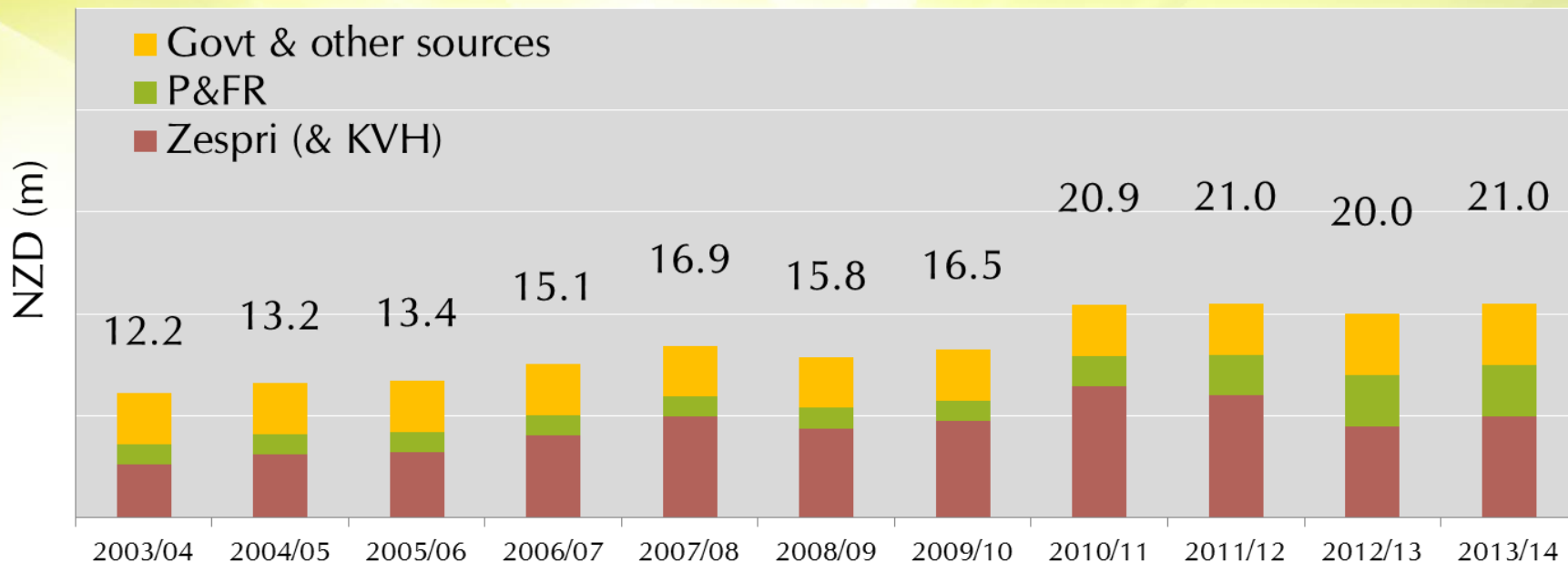


The Zespri Model – how does it deliver?

- Creates the advantage of scale
- Onshore competition but offshore collaboration
- Specialisation
- Direct line from the customer to the grower
- Funds and consolidates industry investment



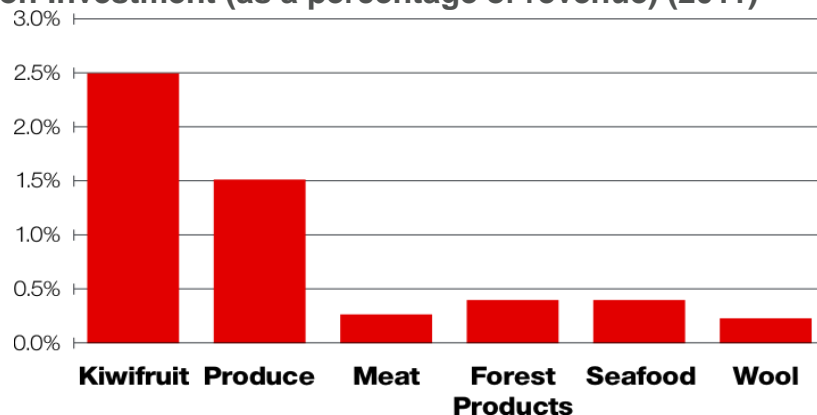
Innovation investment: soil to spoon



Innovation Strategy

- Optimise core performance
- Build competitive advantage
- Pursue growth horizons

Innovation Investment (as a percentage of revenue) (2011)



ZESPRI New Cultivars

Breeding Programme Overview



**Female
seedlings**

100,000+
Seedlings



**Clonal
Trials**

- 47 New Cultivars



**Block
Trials**

- 2 Red
- 2 GOLD
- 1 GREEN



**License
Release**

- Early GOLD
- Sweet GREEN
- Late GOLD



The Focus Orchard Network (FON)
was established to improve orchard profitability.

Initially funded by the Ministry of Agriculture and Forestry Sustainable Farming Fund, this project is an industry learning programme profiling

8 ORCHARDS
AROUND THE NORTH ISLAND
AS DEMONSTRATION PROPERTIES.

PERFORMANCE
GROWING ENVIRONMENTS & MANAGEMENT SYSTEMS

The Focus Orchard Network has been established across the growing regions representing distinct kiwifruit growing environments and management systems, and aims to lift participant's performance.

FOCUS
PLAN & IMPLEMENT MANAGEMENT PROGRAMMES

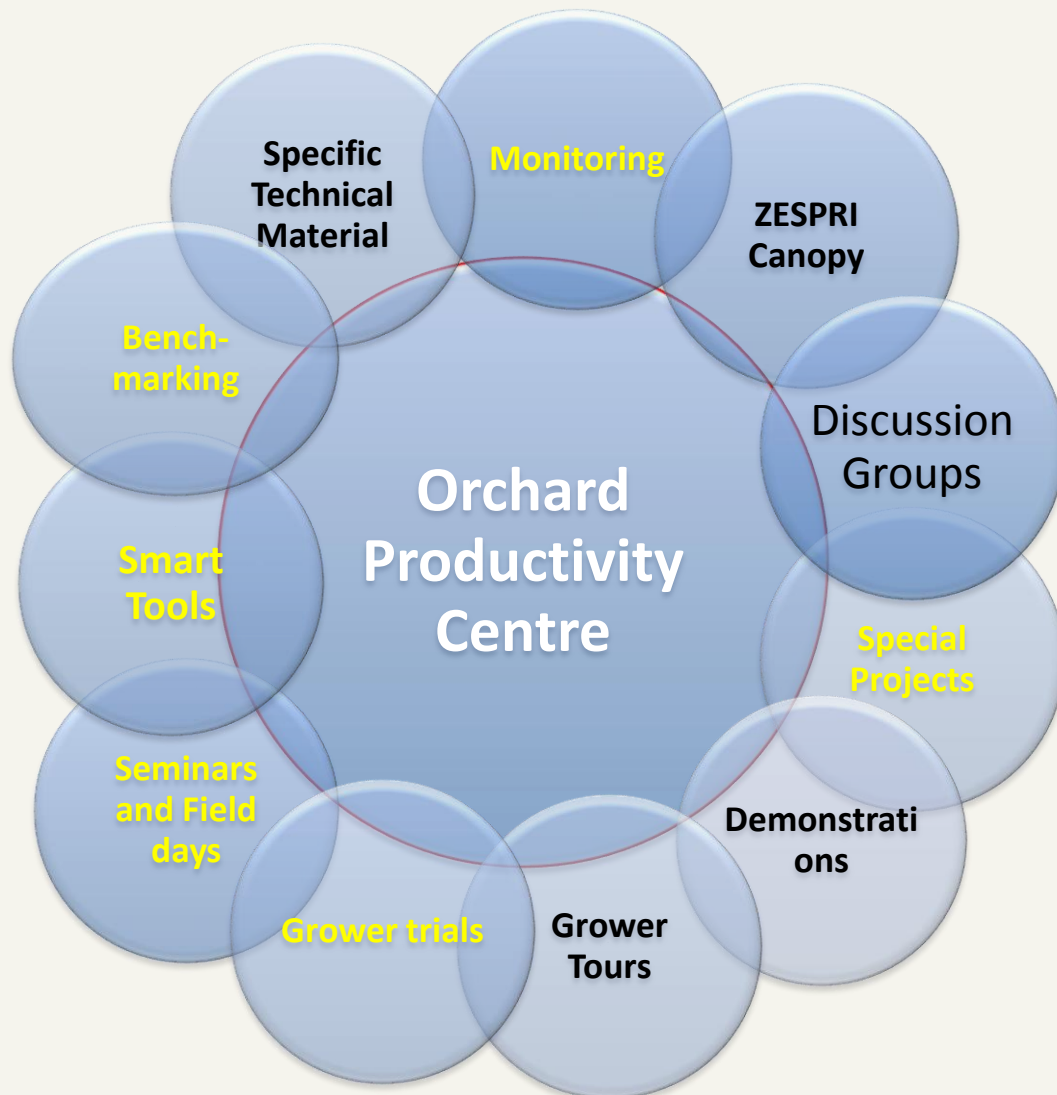
The management programmes of individual focus orchards are driven by the participating growers, with the inputs of specialists to aid planning and implementation of orchard management programmes.

MONITOR
IDENTIFYING MEASURABLE EFFECTS

It is acknowledged that there is no one single way to run a successful, profitable kiwifruit orchard business. But for different management options, ZESPRI wants to identify what the measurable effects and the associated costs, benefits and trade-offs of the different approaches are.

IMPLEMENT
ORCHARDS & REGIONS

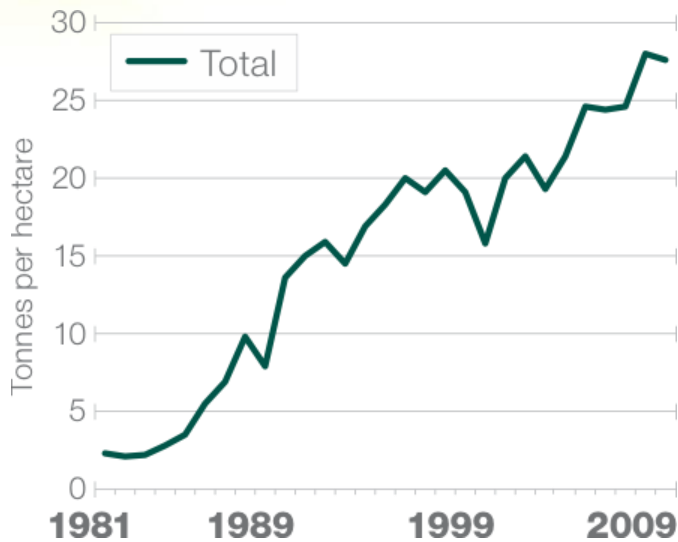
By demonstrating what is possible to achieve and how, the wider grower community will have the confidence to adopt management practices that will add value to their own orchard operations.



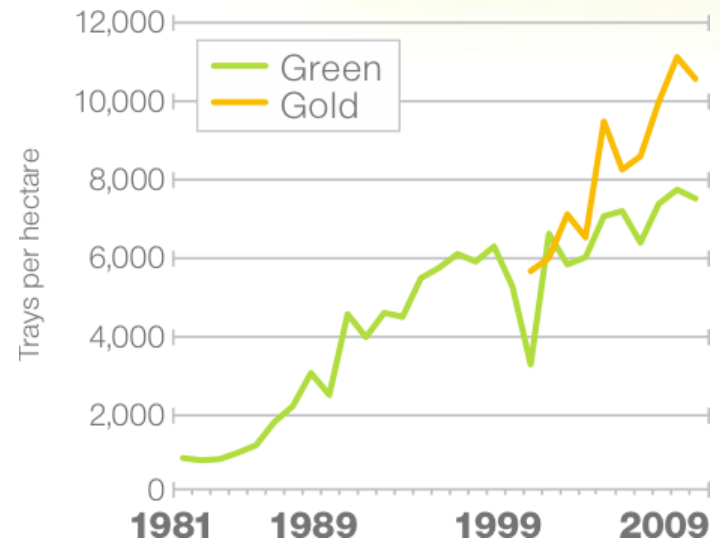
Evidence of Growth

Kiwifruit Export Yield – per hectare



Source: Statistics NZ, NZIER

Kiwifruit Trays – per hectare

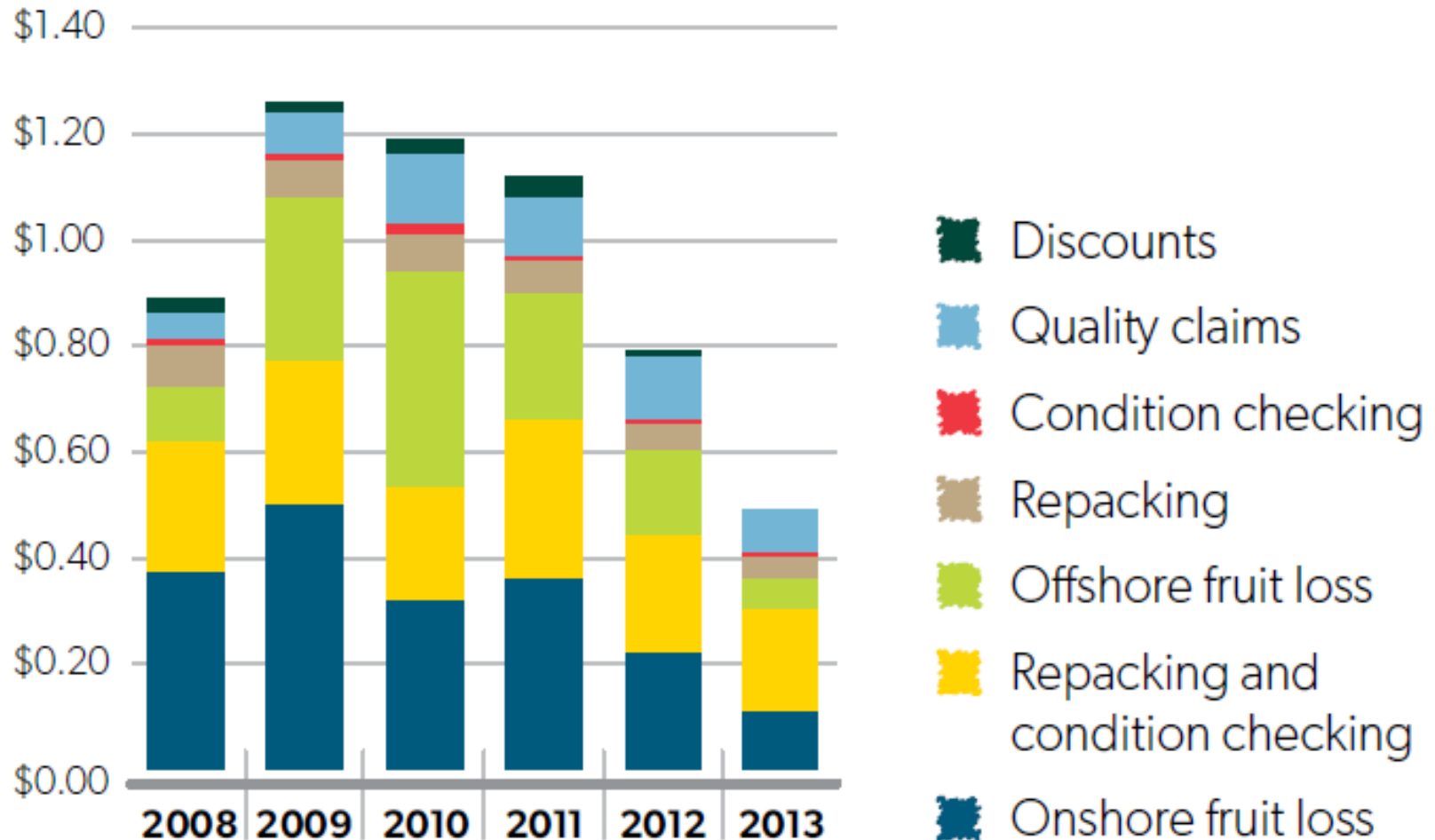


Source: ZESPRI

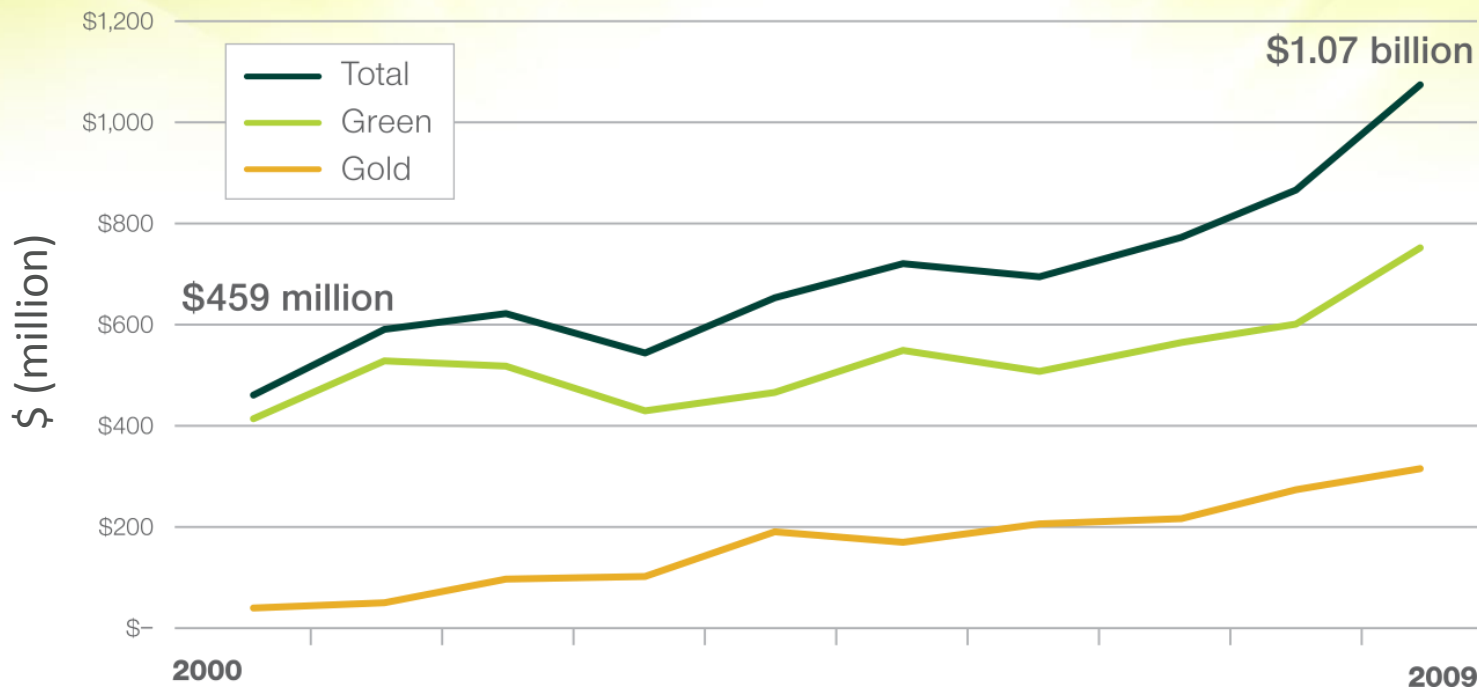
NB. New orchard plantings contribute to productivity increases in the early 1980s and 1990s (GREEN) and 2000s (GOLD)

Green quality costs

Per submit tray



Growth through the decade



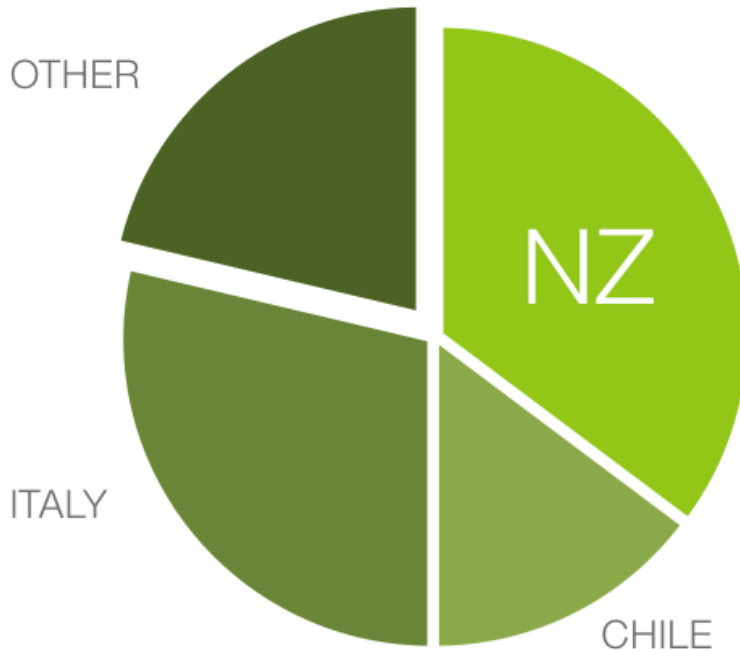
9.8% compound average growth rate (CAGR)

Source: Statistics NZ, ZESPRI

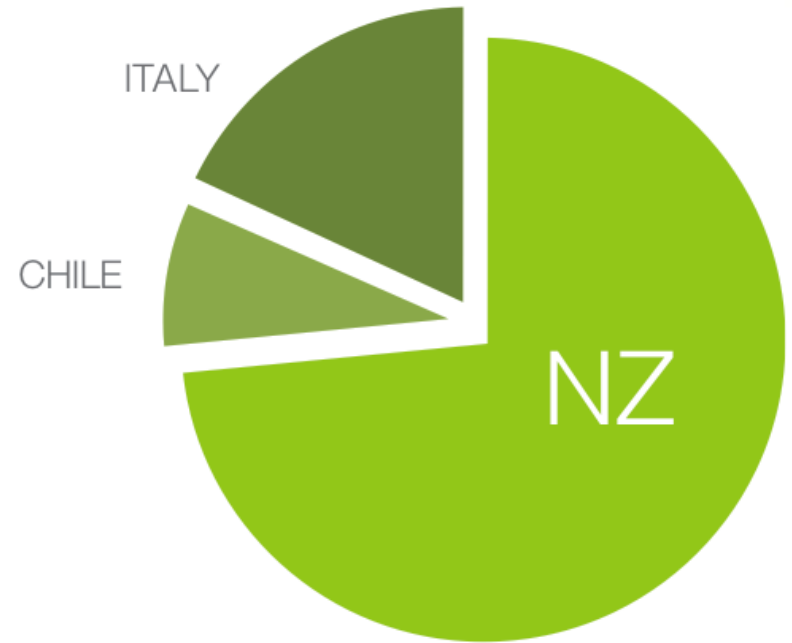


As a result, New Zealand has built the global category...

Globally Traded Kiwifruit – Volume Share



Value Share



QUESTIONS?

