





# THE AOTEAROA HORTICULTURE ACTION PLAN SETS AN AMBITIOUS GOAL FOR THE HORTICULTURE SECTOR

Launched in 2023, the industry led, government enabled Growing Together 2035 Aotearoa Horticulture Action Plan (AHAP) aims to double the farmgate value of horticultural production by 2035 in a way that improves prosperity for our people and protects our environment.

The plan sets out **24** key priority areas, **56** outcomes and **76** actions to help the sector achieve sustainable growth and move the horticulture industry towards this goal. The priority areas, outcomes and actions sit within five pillars:

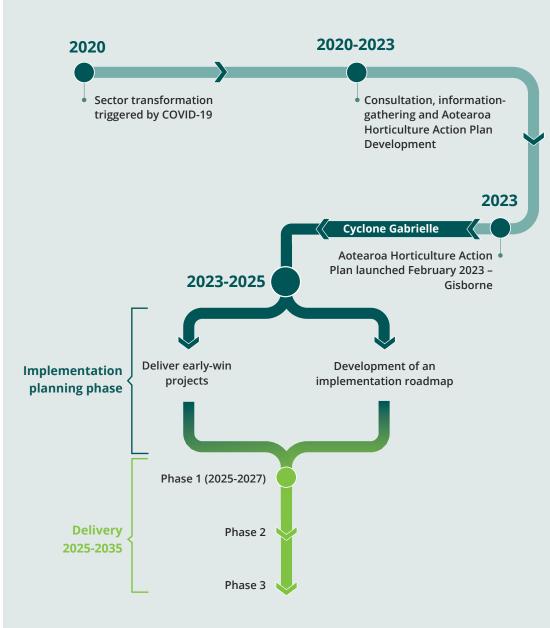
Grow Sustainably	Improving sustainability and mitigating climate change
Optimise Value	Domestic and export market and consumer needs are understood, data is well utilised, and the value chain is optimised for demand
Māori are Strong in Horticulture	Māori participation in high-value¹ horticulture triples by 2035
Underpinned by Science and Knowledge	A strong research and development programme and consideration of Mātauranga Māori enables, accelerates and supports horticulture
Nurture People	Horticulture attracts, retains and grows great people

<sup>&</sup>lt;sup>1</sup> Value is defined as high monetary return to growers and/or societal value, e.g. domestic food supply.

## THE AHAP IS ENTERING ITS IMPLEMENTATION STAGE

As the adjacent diagram shows, efforts to date have focused on early-win projects and implementation planning. We are now entering the delivery stage of the AHAP and this implementation roadmap sets out the priorities for Phase One to achieve the sector's goal of doubling farmgate value by 2035.





#### A PHASED APPROACH

Ideally, all outcomes in the AHAP will be achieved within the lifespan of the Plan (2025-2035). The plan's size and scope mean that a phased approach to delivery is necessary. While all actions are a high priority, it is not possible to progress them all at once.

The 56 outcomes in the AHAP have been allocated<sup>2</sup> to one of three categories:

- Critical <u>foundations</u> for New Zealand horticulture i.e. if this outcome is not achieved, it will be difficult to maintain horticulture productivity, volume and/or value over time.
- Critical to <u>grow</u> farmgate value in the next decade i.e. increases profit, reduces cost, increases productivity, and allows horticulture to expand.
- Critical for a <u>future-fit</u> sector i.e. increases social license to grow, diversifies income streams, generates value add, demonstrates innovation, encourages best practice adoption, and makes the sector more attractive.

The *foundational* outcomes are considered high priority, and all are included in the Phase One implementation roadmap.

However, the overarching goal of the AHAP is not to simply sustain current horticulture, but to achieve sustainable growth of the sector. For this reason, some of the *grow* outcomes are also included in Phase One.

Finally, a small number of the *future-fit* outcomes have been included in Phase One. These are outcomes that have a long lead in time.

A full list of AHAP outcomes are included in Appendix 1.

<sup>&</sup>lt;sup>2</sup> It is acknowledged that this allocation process is subjective. However, it provides a method for grouping the outcomes. The outcomes in one grouping are no less important than those allocated to another grouping.



It is important to note that:

- The support and strong engagement of commercial industry will be critical to the success of the plan and driving growth.
- All actions need to be executed with sustainability in mind – the overarching AHAP goal explicitly states this. A suite of measures has been developed to track changes in the wider sector that relate to the five pillars in the AHAP. A number of these measures have a specific focus on sustainability.
- Work is already underway. A stocktake process undertaken in 2024 identified over 530 discrete initiatives (complete, underway, or planned) that align with AHAP actions.
- The stocktake, along with a gap analysis and stakeholder engagement, determined which actions to include in this implementation roadmap.
- This document only covers Phase One of implementation. The rest of the outcomes will be included in future phases.

- Entities need to consider how and when each action should be implemented.
- While many of the Phase One actions require new projects to get underway, others focus on accelerating existing work programmes. This approach has been taken to transition the AHAP into delivery mode and to right size the amount of work for the lifespan of the first Implementation Roadmap. It will build momentum and buy-in within the quad partners, and included projects will make inroads towards the AHAP objective of doubling horticulture revenue. Future Implementation Roadmaps will be ambitious, building on the foundational work delivered during phase one to advance the objectives of the AHAP.
- Stakeholders will undertake significant work beyond the scope of this implementation roadmap. This additional work will be very beneficial, allowing us to progress toward the AHAP goal of doubling farmgate value even faster.

We expect to release additional implementation roadmaps over the lifespan of the AHAP to ensure all outcomes are progressed over time. Future roadmaps will cover the next phases of work, considering progress already made, evolving priorities and the operating environment at the time.

## **COLLABORATION IS CRITICAL TO** SUCCESSFULL DELIVERY OF PHASE ONE

Achieving the AHAP goal of doubling farmgate value by 2035 will require everyone to work together, collaborate and contribute. Commercial industry support and involvement will be critical for success, driving change and growth. This implementation roadmap sets out the focus areas for the first phase of delivery. It serves as a challenge to all quad partners – what can you and your organisation contribute to help achieve sustainable sector growth?

#### If you don't know where to start, start here!

Questions to consider:

- Is there anything in the roadmap that your entity could or should lead?
- Is there anything in the roadmap that your entity is already progressing?
- Is there anything in the roadmap that your entity could or should support?
- Who could you reach out to across the guad partnership (whether leading or supporting) to ensure a collaborative approach?

If there is a project you could assist with, whether it is on this list or not, get in touch with the programme manager<sup>3</sup> to discuss!

The programme team will endeavour to capture all partner efforts that deliver on this implementation plan throughout Phase One (2025-2027), so that progress can be reported.



<sup>&</sup>lt;sup>3</sup> Programme manager: anna.rathe@hortnz.co.nz.



## IMPLEMENTATION ROADMAP TABLE EXPLAINER

#### **Pillars:**

A separate table has been developed for each of the five pillars in the AHAP.

#### **Outcome:**

These have been taken directly from the AHAP.

## Areas of focus needed to achieve the outcome:

This section indicates what needs to be addressed to make progress. In some instances, action will be required across multiple areas of focus. The list of areas is not exhaustive.

#### **Phase One actions**

These are the actions to be taken by lead entities to move towards the desired outcome. Some will be able to be completed in full in Phase One (2025-2027) while others may take longer. Entities may wish to undertake additional actions that support the desired outcome.

#### Lead entities4

This column suggests where leadership accountability could or should lie i.e. those that have the ability to make the required change. These entities will be the first port of call for the programme team when reporting on progress and next steps. Industry input will need to be incorporated into all actions, no matter the lead entity.

#### **Quad collaborators**

The recommended actions require a collaborative effort for success. The involvement of quad partners is key to ensure the actions taken are well-informed and have the support of relevant parties.

<sup>&</sup>lt;sup>4</sup> The driver of an action and the lead entity can be different parties. For example, industry bodies and growers are driving many of the actions in the roadmap but may not be the logical lead.

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## **PHASE ONE (2025-2027) ACTIONS**

#### **Grow Sustainably**

						TCO					QU LLAB	JAD ORAT	rors	
Comms & awareness		Comms & awareness Analysis & advice Capability Policy Infrastructure Systems & processes Research & development			Systems & processes	Research & development	PHASE ONE ACTIONS	LEAD ENTITIES <sup>5</sup>		Industry	Māori	Science		
								Implement the recommendations in the 2021 and 2022 water availability and security technical papers (commissioned in by MPI and the Water Availability and Security Advisory Group), as appropriate.	MPI					
Co-investment in regional water storage and infrastructure is evidence-based. (1.2)		Х		X	X			Ensure regulatory settings enable water storage.	MfE MPI					
							Progress regional water storage projects that already have compelling evidence.	Water user groups Regional Councils						
								Crown funding criteria encourages water storage applications, as appropriate.	MBIE MPI					
New Zealand regulatory systems are effective so growers have access to the best crop protection tools and practices. (1.3) <sup>6</sup>				X		x		Implement the recommendations from the Ministry for Regulation review of the agricultural and horticultural products regulatory system.	MPI MfE EPA					
Policy settings enable horticulture	lture								Recognise existing industry assurance programmes, wherever possible, as a way of meeting regulatory and market requirements.	MPI MfE MBIE				
to thrive and attract new								Map the future assurance landscape.	HortNZ					
entrants, utilise accepted industry programmes and are well		X		X		X		Quantify the cost of duplication in assurance and the impact on growers.	HortNZ					
understood by all parties. (1.4)								Develop nationally consistent and enabling regulation for: - commercial vegetable production - horticultural structures and activities.	MfE MPI					
There is a clear understanding of the horticulture sector's challenges								Provide a coordinated, regular, advertised, pan-sector programme for knowledge exchange with officials who work on topics related to horticulture.	HortNZ					
and opportunities, with industry and government working together to design enabling policy settings. (1.4)	X		X X Identify wh	Identify where policy could enable sustainable ongoing horticulture production and where policy is adversely affecting the sector.	AHAP programme team MPI HortNZ									
The right crop protection tools are used at the right time, with the right		х	Х			Х	Х	Combine existing information from A Lighter Touch and product groups to identify priority crop protection tools.	HortNZ Industry bodies					
method. (1.3)								Encourage grower adoption of Integrated Pest Management tools and practices.	Industry bodies					
Growers are practicing integrated								Map future pan-sector grower extension needs.	AHAP programme team					
farm planning for managing fresh water, climate change and biodiversity. (1.1)			X	Continue to progress nutrient management research.	Vegetable industry bodies Kiwifruit industry bodies									

<sup>&</sup>lt;sup>5</sup> As industry is the beneficiary, industry will need to be engaged with on every action in the roadmap. Consultation with industry is assumed, and therefore not explicitly noted for each action.

<sup>&</sup>lt;sup>6</sup> Note, the wording of this outcome has been amended to expand the scope, rather than focusing only on global harmonisation.



## Optimise Value

OUTCOME		AREAS ACI	S OF F								QUAD COLLABORATORS			
		Analysis & advice	Capability	Policy	Infrastructure	Systems & processes	Research & development	PHASE ONE ACTIONS	LEAD ENTITIES <sup>7</sup>	Government	Industry	Māori	Science	
Market access opportunities (both existing and new) are maximised, importing country requirements are well understood, and		х		х		Х	Х	Identify resources and support that would enable tier 2 and 3 crops to increase exports.	Plant Market Access Council AHAP programme team Industry bodies					
outcomes with partner countries are fully leveraged and mutually beneficial. (2.1)								Track and work to resolve non-tariff barriers for New Zealand horticulture exports.	MPI MFAT					
Consumers understand the Aotearoa New Zealand horticulture story, strongly value the contribution of growers and actively seek out locally grown produce. (2.2)	х							Connect efforts to raise public awareness of the New Zealand horticulture story so they are joined up and leveraging one another.	HortNZ					
Supply chain to retail market is optimised through successful collaboration systems that achieve critical volumes, reduce duplication across and within regions, and lower costs and emissions. (2.3)		x		х	x			Map domestic supply chain vulnerabilities and the horticulture value at risk if these vulnerabilities are realised.	AHAP programme team					
Data can be inputted once and used with								Establish an online library to share publicly available horticulture resources.	HortNZ					
permission by multiple parties in multiple ways to support informed decision making and increased compliance. (2.4)		Х						Incorporate high level Good Agricultural Practice (GAP) programme data in Fresh Facts.	United Fresh					

<sup>&</sup>lt;sup>7</sup> As industry is the beneficiary, industry will need to be engaged with on every action in the roadmap. Consultation with industry is assumed, and therefore not explicitly noted for each action.



## Māori are Strong in Horticulture

	Al		OF FO							QUAD COLLABORATOR												
ОИТСОМЕ		Analysis & advice	Capability	Policy	Infrastructure	Systems & processes	Research & development	PHASE ONE ACTIONS	LEAD ENTITIES <sup>8</sup>	Government	Industry	Māori	Science									
Horticulture is seen by Māori as a desirable sector to build a career	х		х			F		Promote horticulture uptake of workforce development support opportunities.	HortNZ													
in and career pathways are widely available. (3.1)	r pathways are widely					Transition Māori participants from young grower competitions into the young Māori grower of the year competition.	HortNZ															
The number and profitability of Māoriowned horticulture businesses have	wned horticulture businesses have acreased, as have Māori horticulture exports. (3.4)  X  xrom Optimize Value: Māori trade increased through leveraging aternational arrangements and trade	2								Communicate Māori-led stories about success and leadership in horticulture.	Māori horticulture businesses											
exports. (3.4)  From Optimize Value: Māori trade					x	x	x	v	v	v					V		Leverage existing international arrangements, international forums and trade agreements to increase Māori trade.	Māori horticulture businesses				
												X		Raise awareness of free trade agreement opportunities for horticulture.	MPI MFAT							
international arrangements and trade agreements. (2.1)								Celebrate excellence in Māori horticulture via the Ahuwhenua Trophy competition.	HortNZ MPI													
A greater proportion of Māori-owned land is developed into high-value sustainable horticulture for domestic		х	х					Streamline the provision of regional advisory services offered by MPI and wider government so Māori-owned organisations can access advice on a range of land uses and issues from a source that best fits their needs.	MPI													
and export markets. (3.2)								Ensure regional advisors are knowledgeable about horticulture.	MPI HortNZ													
Māori are accessing capital for horticulture investment and there are more Māori owned and led successful horticulture businesses. (3.3)		x			х			Map available funding sources that may be applicable to horticultural endeavours.	AHAP programme team													

<sup>&</sup>lt;sup>8</sup> As industry is the beneficiary, industry will need to be engaged with on every action in the roadmap. Consultation with industry is assumed, and therefore not explicitly noted for each action.



#### **Underpinned by Science and Knowledge**

		AREAS ACI		OCUS THE C						QUAD COLLABORATORS				
OUTCOME		Analysis & advice	Capability	Policy	Infrastructure	Systems & processes	Research & development	PHASE ONE ACTIONS	LEAD ENTITIES <sup>9</sup>	Government	Industry	Māori	Science	
								Provide post entry quarantine capacity and capability to efficiently service current and expected future demand.	MPI					
Improved access to high quality, pest-free germplasm material imported into New Zealand has increased confidence to invest in breeding programmes. (4.3)	х		x	x	x	x		Initiate the regulatory reform of the germplasm import system to enable efficient and safe access to the imported plant germplasm that New Zealand wants.	MPI					
								Identify vulnerabilities in the imported seed germplasm pathway and mitigations.	Vegetable industry bodies					
Areas for technology development have been identified, roadmaps constructed, and investment secured to position Tier 1 crops for global success. (4.4)		х					х	Continue to identify next horizon technology and innovation priorities for Tier 1 crops.	Tier 1 crop industry bodies					
Regional programmes are accelerating the development of Tier 3 crops. (4.5)		х					Х	Identify crop-specific priority opportunities and challenges that need to be addressed to accelerate growth and build scale.	Tier 3 crop industry bodies AHAP programme team					
Tier 2 crops have a pathway to sustainable growth (including investment and integration of activities), increasing their global footprint, category dominance and returns. (4.1)		x			X	x	X	Identify crop-specific priority opportunities and challenges that need to be addressed to accelerate growth and build scale.	Tier 2 crop industry bodies AHAP programme team					
From Optimise Value: Tier 2 crops meet requirements to successfully compete in the market, reducing product loss and improving quality for better consumer outcomes. (2.3)								Scope the value of a collective approach to post-harvest research and technology where challenges exist that are common to multiple crops.	BSI					

<sup>&</sup>lt;sup>9</sup> As industry is the beneficiary, industry will need to be engaged with on every action in the roadmap. Consultation with industry is assumed, and therefore not explicitly noted for each action.



#### **Nurture People**

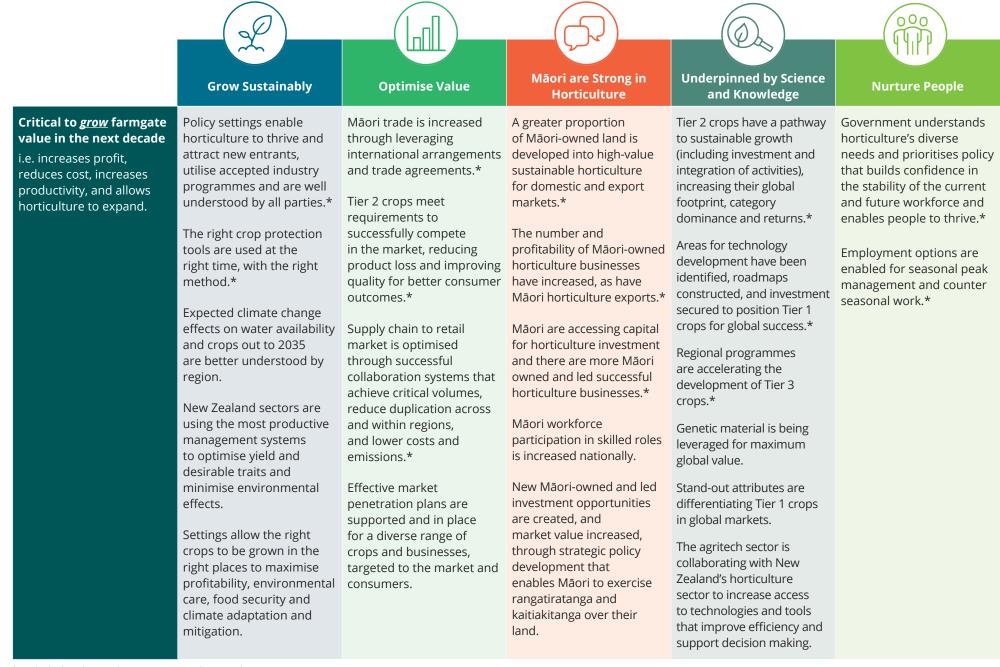
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Comms & awareness Analysis & advice Capability		Policy	Infrastructure	Systems & processes	Research & development	PHASE ONE ACTIONS	LEAD ENTITIES <sup>10</sup>	Government	Industry	Māori	Science			
Horticulture attracts, retains and								Improve the horticulture sector's ability to forecast upcoming workforce needs.	HortNZ					
grows great people through attractive working conditions, accessible		Х	х	X				Develop a pan-sector workforce plan informed by forecasting.	HortNZ					
opportunities for all and training that meets people's needs. (5.1)		^	^	^				Ensure specialist courses critical for horticulture remain available.	Tertiary education providers					
The December of Consequent Freedom								Continue work to improve the Recognised Seasonal Employer (RSE) policy to provide certainty in settings for the next 20 years.	MBIE					
The Recognised Seasonal Employer Scheme is fit for purpose and beneficial for all involved. (5.2)			Х	X		х		Progress the Whanau Moana Nui framework – begin pilot with Pacific Nations and employers.	HortNZ					
beneficial for all involved. (5.2)							Continue to build RSE employers and workers cultural awareness by introducing a framework and training tools.	MBIE						
Horticulture is an attractive and ethical industry with fair pay conditions, accessible opportunities and an excellent culture in which individuals thrive. (5.3)	X					х		Embed social practice assurance initiatives into horticulture businesses.	HortNZ MBIE					
Government understands horticulture's diverse needs and prioritises policy that builds confidence in the stability of the	vernment understands rticulture's diverse needs d prioritises policy that builds nfidence in the stability of the rrent and future workforce and		x		X				Establish a descriptive, enduring and cross-government policy programme to ensure workforce, labour and employment settings support horticulture and are well aligned across agencies.	MPI MBIE MSD MoE				
current and future workforce and enables people to thrive. (5.2)								Build suitable flexibility into policy and legislation to provide domestic workers with more options for full employment in their region and to enable people to work across industry.	MPI MBIE MSD					
Employment options are enabled								Promote New Zealand horticulture jobs for holiday visa applicants.	MBIE HortNZ					
for seasonal peak management and counter-seasonal work. (5.2)	X	X		X				Ensure (non RSE) visa settings allow the horticulture industry to: - access skilled seasonal workers - meet seasonal surge labour requirements.	MBIE MPI					
								Provide a horticulture-specific leadership programme.	HortNZ					
								Build a horticulture alumni.	HortNZ					
Ongoing development of our leaders. (5.4)			Х					Ensure horticulture leadership offerings incorporate learnings from the Māori leadership development framework.	HortNZ					
								Empower women in horticulture to achieve their full potential by encouraging their entry into leadership roles.	United Fresh					

<sup>&</sup>lt;sup>10</sup> As industry is the beneficiary, industry will need to be engaged with on every action in the roadmap. Consultation with industry is assumed, and therefore not explicitly noted for each action.

#### Appendix 1: Overview of the category allocation for all 56 outcomes in the AHAP across the five pillars

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	Grow Sustainably	Optimise Value	Māori are Strong in Horticulture	Underpinned by Science and Knowledge	Nurture People
Critical foundations for New Zealand horticulture i.e. if this outcome is not achieved, it will be difficult to maintain horticulture productivity, volume and/ or value over time.	Co-investment in regional water storage and infrastructure is evidence-based.*  New Zealand regulatory systems are globally harmonised so growers have access to the best crop protection tools and practices.*  There is a clear understanding of the horticulture sector's challenges and opportunities, with industry and government working together to design enabling policy settings.*	Market access opportunities (both existing and new) are maximised, importing country requirements are well understood, and outcomes with partner countries are fully leveraged and mutually beneficial.*  Consumers understand the Aotearoa New Zealand horticulture story, strongly value the contribution of growers and actively seek out locally grown produce.*	Horticulture is seen by Māori as a desirable sector to build a career in and career pathways are widely available.*	Improved access to high quality, pest-free germplasm material imported into New Zealand has increased confidence to invest in breeding programmes.*	Horticulture attracts, retains and grows great people through attractive working conditions, accessible opportunities for all and training that meets people's needs.*  The Recognised Seasonal Employer Scheme is fit for purpose and beneficial for all involved.*  Horticulture is an attractive and ethical industry with fair pay conditions, accessible opportunities and an excellent culture in which individuals thrive.*  Ongoing development of our leaders.*

<sup>\*</sup> Included in the Implimentation Roadmap - Phase One



<sup>\*</sup> Included in the Implimentation Roadmap - Phase One

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	Grow Sustainably	Optimise Value	Māori are Strong in Horticulture	Underpinned by Science and Knowledge	Nurture People
Critical for a future-fit sector  i.e. increases social license to grow, diversifies income streams, generates value add, demonstrated innovation, encourages best practice adoption, and makes the sector more attractive.	Growers are practicing integrated farm planning for managing fresh water, climate change and biodiversity.*  Horticulture crop and packaging waste is minimised and waste value streams optimised.  The horticulture sector supports the New Zealand economy to achieve climate change targets.  There is investment in emission-lowering technologies and research for crops and cultivation.  Financial structures support conversion to higher productivity and lower input/ emission systems.	Data can be inputted once and used with permission by multiple parties in multiple ways to support informed decision making and increased compliance.*  New Zealanders have a food-secure future and Aotearoa New Zealand is treated as a key market by growers.  Health and nutrition benefits are known and support an increase in vegetable and fruit consumption.	Increased numbers of Māori hold horticulture qualifications.  Māori recognise the opportunity horticulture presents and are well connected.  Unique indigenous horticulture (taonga species) by Māori is growing, including through iwi-led development of indigenous cultivars.  Information about taonga species is being retained, disseminated and used appropriately.	Policy settings are enabling the development and early adoption of new and emerging production technologies and tools.  New Zealand's existing cultivars grown in new production platforms are meeting global demand.  Emerging digital technologies have been applied to accelerate innovation in Tier 1 crops.	A higher proportion of permanent workers are utilised – supported by automation.  Support for growers is available to reduce stresses associated with horticulture businesses.  Horticulture attracts and celebrates a diverse workforce with a varied skill set.  Businesses are supported to stay in horticulture where appropriate and to move out when it is not right for them.

 $<sup>\</sup>ensuremath{^{\star}}$  Included in the Implimentation Roadmap - Phase One





#### **GLOSSARY**

**MPI** - Ministry for Primary Industries

**EPA** - Environmental Protection Authority

MBIE – Ministry for Business, Innovation and Employment

**MFAT** – Ministry of Foreign Affairs and Trade

**MfE** – Ministry for the Environment

**MSD** - Ministry of Social Development

**MoE** – Ministry of Education

HortNZ - Horticulture New Zealand

**BSI** - Bioeconomy Science Institute

#### What are Tier 1, 2 and 3 crops?

**Tier 1:** generate close to or over \$1 billion annual value (large, sophisticated, world-leading, with strong integrated pest management and proprietary cultivars, etc.).

**Tier 2:** generate more than \$100 million annual value (have some of the above attributes, but not all).

**Tier 3:** generate less than \$100 million annual value (emerging and small-scale crops).

#### **Quad collaborators**

The AHAP is underpinned by collaboration between industry, government, Māori and science.



## GROWING TOGETHER 2035

Aotearoa Horticulture Action Plan