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THE MARKETS**



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AHEAD – AUGUST**



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THE FIELD**

FIRST DISTRIBUTOR EVENT TO DRIVE GLOBAL SALES



Zespri Distributor Market Tour group.

For the first time, Zespri's top 30 distribution partners from Europe, China, Korea, Taiwan, and Japan assembled as we look at how we can build on the value we're returning to growers through our sales and marketing programme.

Around 80 people from 13 different countries attended the Distributor Market Tour which took place over five days in Shanghai and Shenzhen. Previously tours for our distribution partners have been held in New Zealand.

The tour included Zespri Chairman Nathan Flowerday, Deputy Chairman Paul Jones, CEO Jason Te Brake, President - Greater China Michael Jiang, President - APAC Ichiro Anzai, and President - Europe and North America, Steven Martina.

Jason says the distributors on the tour represented more than 60 percent of our global volume.

"It was really valuable to bring this group together for the first time in market and share lessons from across various regions.

"Our discussions focused on how we can secure more value through best practice sales and supply chain delivery, as well as our plans to create more demand and sales opportunities in future seasons," says Jason.

"One of the most common issues our distribution partners raised is that they want more fruit from Zespri, including in the non-New Zealand season where they're seeing increasing competition which they are unable to respond to.

"This really reinforces both strong consumer demand that has been built off the back of our investment in the market, and the importance of our ZGS and 12-month supply strategy to help fill the gap between our New Zealand supply seasons and hold onto our shelf space in the light of increasing competition."

The action-packed itinerary included visits to retail stores and the Shanghai Hui Zhan wholesale market, as well as to our two

largest distributors and long-term strategic partners in China, Good Farmer and Joy Wing Mau.

Jason notes the tour was an opportunity to further build on the strong partnerships we have which have allowed us to deliver such strong value.

"It's also a chance to see first-hand some of the successes we've had in our key markets, and to look at how we can all learn from each other.

"The majority on the tour were from outside of China and they got to witness first-hand some of the significant growth that's occurred there and have a think about what might be relevant in their markets.

"There were also plenty of discussions around Zespri's focus on delivering consistently high-quality fruit throughout the year, backed by world-leading marketing campaigns to support our brand, and how we best work together to support the increased volume of fruit we expect to have in the coming years.

"We're pleased to have had such positive feedback from our distributors who joined us, with many reflecting on the value of sharing experiences from different regions."

SCAN ME



Or check out the link here for a video update from Jason and Nathan: [Canopy > News > Chairman and CEO video: Distributor Market Tour](#)



JASON'S VIEW

Hi everyone,

I'm in the final stretch of five weeks in our markets where I've been talking with our key customers and in-market teams.

This included joining our first-ever global distributor tour, which brought together our top 30 distribution partners from Europe, China, Korea, Taiwan, and Japan. It was a great chance to discuss how we can secure more value through best practice sales and supply chain delivery, and our plans to create more demand and sales opportunities in future seasons.

We've had one of our strongest starts to the season, and although the past month has been challenging with domestic fruit competition, there's a lot of support for the work we've done to deliver high-quality fruit in big volumes. Our distributors and customers have made clear they want even more fruit from us in future seasons to help meet consumer demand. They've noted growing competition in the non-New Zealand season which will start to spill over into our season where they don't have the supply to respond.

We're seeing a lot of summer fruit like melons, peaches, berries, and grapes putting pressure on our weekly sales rates in our key markets. It's something our season planning considers every year. A more aggressive season start to take advantage of early-season sales opportunities was part of this planning. With summer fruit expected to exit the market earlier this year and our fruit quality performing strongly, we're in a good position to capitalise in the coming months, rolling out strong brand campaigns to drive sales. We're closely monitoring the comprehensive data we now have around fruit quality and in-market inventory so we can continue optimising our inventory management.

In Europe we're seeing slightly softer consumer demand than we had expected due to local weather conditions, and in North America there's price inflation and an increase in volume of Chilean green kiwifruit putting pressure on sales rates. Across Asia, while local competition has reduced our sales in recent weeks in China, Japan, and Korea, sales rates remain positive and we're using tactical promotions to help sell through some of our smaller sized fruit and higher risk inventory in light of the more competitive environment. The yen and smaller size profile of our crop this year remains something we're managing to mitigate the impact on returns.

Despite this, we are continuing to make solid progress in delivering this season's fruit, having shipped almost 75 percent of this season's crop and delivering around 50 percent of our full season sales plan. In the more competitive market environment, we're focusing on inventory management and making sure we're prioritising the fruit we're holding which is at the top end of our preferred levels of around three to four weeks.

Our recent grower tours have provided an opportunity for growers to see this first-hand, along with some strong campaigns we have running. A few growers have seen fruit from their orchard on shelves or at some of our distribution centres which has been a great reminder about the importance of what we do and our global supply chain working effectively and it's really nice to see growers getting to experience that.

A big thanks to those of you who were able to join our recent Shed Talks. We had more than 400 growers join for good discussions, including on the potential expansion of ZGS and what this might look like. There's a lot of information on this on Canopy so please make sure you check there for the latest information.

I'm looking forward to getting back to New Zealand and catching up with many of you before our Annual Meeting. It'll be a good chance to review the progress we've made over the last season, as well as outline the work ahead of us to ensure we're delivering another successful season this year and beyond.

All the best and speak soon.

Jason Te Brake
Chief Executive Officer



COMING UP: ZESPRI ANNUAL MEETING

We're looking forward to seeing you at the Zespri Annual Meeting at Mercury Baypark, at 1pm on Wednesday 21 August.

The Annual Meeting is a good opportunity for us to come together to get further insight into the past year's results, reflect on our wins, our challenges, and the significant opportunities in front of the industry, ask questions, as well as participate in the voting process for director appointments and resolutions.

If you can't attend in person, we encourage you to tune in online, where you'll still be able to ask questions, and vote remotely. Visit Canopy for information on how to attend online.

Registration will take place from 12pm, with the Annual Meeting starting at 1pm. The KVH and NZKGI AGMs will be held in the morning at the same venue.

Formal notice of the Company's Annual Meeting, the 2023/24 Annual Report, as well as Proxy Forms and information relating to the appointment of Directors, were made available to shareholders in July.

Shareholders may vote at the meeting in person, appoint a proxy to attend and vote on their behalf, or vote in advance. Advance voting (online or by post) and proxy appointments close at 1pm on 19 August. Companies and other incorporated entities must appoint a representative as a proxy if they plan to attend the Annual Meeting.

ANNUAL REPORT AVAILABLE ONLINE NOW!

Based around the theme of 'Quality at our core', our Annual Report provides more detail on our 2023/24 financial results. Read the Report online here: <https://www.zespri.com/en-NZ/publications/annualreports>



KEEN FOR MORE ZESPRI NEWS AND INDUSTRY INFORMATION? MAKE SURE YOU CHECK OUT CANOPY!

SALES APPROACH 100 MILLION-TRAY MARK

We are now halfway through the summer fruit period across our markets and reaching some key milestones for the season. This includes recently moving through the halfway mark for Zespri SunGold™ Kiwifruit sales which are now 54 percent through, or 69 million trays (including conventional SunGold and Zespri™ Organic SunGold™ Kiwifruit).

Two of our largest markets, Mainland China and Japan, have also hit some important season milestones, achieving the halfway mark against their total season plans for all fruit groups, with Europe 42 percent through sales.

Market conditions have been challenging through this first period of summer fruit, with markets facing competition from significant volumes of competitively priced domestic and imported summer fruit, along with a strong presence of Chilean kiwifruit in the US and key European markets.

As at the end of Week 30, 94 million trays – that's 48 percent of our full season plan – have been delivered to our customers, compared to 78 million trays at the same time last year.

Of our Class 1 fruit, our Organic SunGold crop leads the way with 56 percent, two million trays, delivered and conventional SunGold close behind at 54 percent through, with 66.6 million trays delivered. Zespri Green™ Kiwifruit has just reached the 22 million-tray (37 percent) mark and 940,000 trays (24 percent) of our Zespri™ Organic Green Kiwifruit have also been delivered to our customers. Both onshore and in-market fruit quality remains positive to date as we near the halfway point of the sales season, providing a good platform for the second half.

Markets continue the focus on managing spend prudently to maintain run rates through these last few weeks of summer fruit. Summer promotional campaigns, including instore activations and significant sampling programmes, are underway to maintain momentum through July and August. In France, 30 stores in Paris are implementing Point of Sale Material during the Olympic Games to increase brand visibility to an estimated 15 million visitors expected over the duration of the games.

As we look ahead, the outlook in some of our bigger markets particularly in Europe and Asia is for the competition to clear out earlier than usual due to poorer domestic fruit growing conditions, providing earlier opportunity to recapture shelf space and start the important post-summer fruit phase of our season sales plans.



22 AUG -
4 SEPT

SEE YOU AT OUR GROWER ROADSHOWS!

Our Grower Roadshows are coming up from 22 August to 4 September, and we can't wait to connect with as many growers as possible.

Check out the full schedule on page 16 and make sure you register!



Industry Alignment

Thanks to those growers who came along to our recent round of Shed Talks where we discussed a wide range of topics.

As part of the Listening Post, we operated where growers could raise any issues that were top of mind, we got some great

feedback on issues you want fixed and topics you want more information on. Over the coming months, we'll be sharing updates on these issues and answering your questions, starting with an initial update on our **Maturity Clearance System** which there was lots of interest in.



MATURITY CLEARANCE SYSTEM UPDATE

It has been another busy season for the team, with more than 26,000 samples processed between February and July. With the season finished, the team has focused on reviewing the season and what improvements need to be made to ensure a smoother process for growers.

Each year from July onwards, the industry Maturity Review Group comes together to do that, and assess whether any changes are warranted ahead of the following season. The group includes representatives from NZKGI, post-harvest, Zespri, as well as an independent statistician. Ensuring this group captures your views is important to us, so please ensure you are passing your feedback through your Zespri Grower Relations Manager, your post-harvest, or your local NZKGI representative.

We've already had some important questions come through, seeking to better understand:

- Turnaround times for residue testing
- Our approach to clearing by size
- Potential reviews of costs
- Alternative less-destructive testing options.

Aside from technical feedback, we're also looking to improve the user experience throughout the maturity clearance process. This includes the sample request process, the communication flow, the sample collection process, and how you receive and view your sample results.

If you have any feedback in this space, please drop us a line at maturity.support@zespri.com and we'll provide further updates in the coming months.



SHAREHOLDER ALIGNMENT

SHARE OWNERSHIP UPDATE

Growers are encouraged to provide their bank account and GST details to Zespri via the Industry Portal or Canopy to ensure they are eligible to receive their loyalty payment as shares from next year.

Zespri is currently finalising its preparations for the implementation of our Loyalty as Shares and Dividends as Shares initiatives that will commence in 2025 as part of our efforts to improve the industry's share alignment.

You cannot currently opt-in to these initiatives. Growers will be able to opt-in from May 2025 when offer documents are released. The offers to participate will be made in accordance with the Financial Markets Conduct Act.

Please note that due to the structural changes being made to support these initiatives, we do need all growers' bank details, even if you do not intend on opting-in for either of these initiatives. This can be done through the Industry Portal which can be accessed via Canopy.

If Zespri does not receive your bank account and GST details within the required time frame, we will not be able to pay you the first loyalty payment in January 2025 or any other future Loyalty payments. Even if you have provided us with your bank account details in the past, we still ask that you confirm they are accurate and current via the Industry Portal. If you have previously signed up to a Loyalty agreement for the 2023 season or earlier and you are using the same Grower number i.e., 1234/5 (the fifth digit after their KPIN) it will just roll over and you don't need to re-sign the Loyalty contract for the 2024 season. However, bank account and GST details are still required.

There's a range of information on these initiatives on our Share Alignment page on Canopy, including a guided shares journey explaining how our shares work - this is a helpful resource for growers wanting to understand more about shares at Zespri.

SCAN ME



Or follow the link below to check out our guided shares journey on Canopy: [Canopy > Tools > Guided journeys > Understanding our shares](#)

WANT TO KNOW MORE ABOUT OUR SHARE ALIGNMENT INITIATIVES?

Check out: [Canopy > Supply & operations > Your orchard business > Shares > Share alignment](#) or scan the QR code here.



? FAQs

Some of the more consistent questions we've received from growers include:

1. What is Zespri doing to mitigate the potential dilution of shares from any initiatives?

While our plans are still being finalised, Zespri is considering using the capital raised from these share issues to conduct a subsequent share buy-back offer following the 2025 loyalty and dividend share issues. Before any potential future buyback, Zespri is seeking a binding ruling from the IRD to ensure that any proceeds paid to eligible selling shareholders would be tax free should a buyback proceed. Until this ruling has been made, a future buy back cannot be confirmed.

2. Will Zespri consider lowering the 6:1 share cap?

Currently we're focusing on the loyalty and dividend share initiatives to be implemented in 2025. We've made a commitment to further consult with the industry on potential additional share initiatives which could be implemented after the loyalty-as-shares and dividend-as-shares schemes are operational. Any proposal to lower the 6:1 share cap would require a change to the Zespri Constitution via a shareholder vote.

3. I received something from Zespri asking for my bank details? Is this some sort of spam?

All growers will receive a letter outlining a requirement to provide their updated bank details to Zespri. The letter is not spam and reflects the shift in 2025 of loyalty payments being paid direct from Zespri rather than through post-harvest entities. Zespri needs to obtain grower bank accounts and GST details to ensure we can make these payments, with grower details stored securely in our system.

4. Is there a target in terms of improving grower shareholding in Zespri?

Yes, we've set ourselves three targets. As part of our goal to improve the number of New Zealand growers owning Zespri shares, we've set a target of having at least 75 percent of New Zealand growers as shareholders by 2030. We also want to improve alignment, and want at least 60 percent of New Zealand growers to hold shares at a ratio of between 0.5 and 2.0 shares per tray of production by 2030. As part of our efforts to minimise shareholder dilution, we've also set a target for the percentage of dry shares, and shares above the 6:1 cap, to be below five percent by 2028.

MAXIMISING VALUE FOR GROWERS

Our strategy for maximising value for growers is based around consistently building demand for our fruit through a brand-led demand strategy.

We want to create strong demand that outpaces supply so that we can deliver strong and sustainable returns to growers over the long-term.

This is driven by the sustained investment we make in our sales and marketing activities, helping build our brand and promote the health and nutrition benefits of Zespri Kiwifruit.

It's also supported by a market development framework which looks at how we can best drive value for growers, including setting out the varying levels of investment we'll make across our markets to help build distribution, drive penetration, or increase the frequency of customers purchasing our fruit.

All of this is dependent upon our ability to deliver safe, healthy, traceable, and consistently high-quality Zespri-branded kiwifruit, starting early in the season and running through all 12 months of the year.

MEETING EARLY SEASON DEMAND

Starting the season strongly is critical in being able to deliver strong value to growers each year.

It's why we incentivise growers to provide a good supply of early season fruit through our KiwiStart programme.

The programme allows us to take advantage of early season market conditions and secure good value for our fruit. We see strong demand for kiwifruit in this period, and it allows us to lock in shelf space and distribution to ensure we maximise the sales programmes. We are able to get volume sold early to ensure we aren't selling that fruit late in the season when we would incur higher costs of quality. The fruit sold early incurs a lower cost of claims or fruit loss to maximise returns to the pool. KiwiStart also allows us to use our industry labour force effectively and manage our supply chain capacity, smoothing out our season, and avoiding packing large volumes of fruit later in the season when quality may be challenged.

KiwiStart plays a really important role, helping avoid selling large volumes of fruit at the end of the season earning a lower OGR. By harvesting in the KiwiStart period, a grower will forego some of the value of their fruit by harvesting at a lower dry matter, or smaller size profile than if they had harvested at a later date. This is offset by the compensation they get through KiwiStart payments for supplying good-quality early season fruit.

It has benefits for the whole pool as well. For a SunGold conventional grower in 2024, the sales we secured in the first four weeks of the season from our KiwiStart fruit made a contribution of approximately 30 cents per tray to the pool, with Green growers benefitting even more, to the tune of approximately \$4.80 per tray from the first five weeks of sales.

"WE WANT TO CREATE STRONG DEMAND THAT OUTPACES SUPPLY SO THAT WE CAN DELIVER STRONG AND SUSTAINABLE RETURNS TO GROWERS OVER THE LONG-TERM."

ZESPRI GREEN KIWIFRUIT

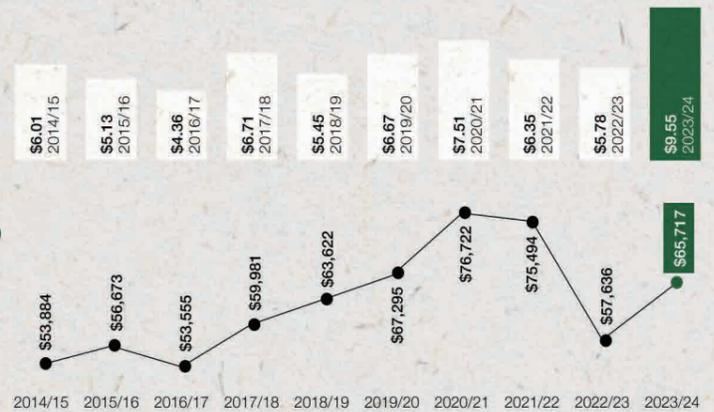
AVERAGE OGR PER TRAY

\$9.55

(Based on FY 2023/24 numbers)

Average OGR per hectare

\$65,717



ZESPRI SUNGOLD KIWIFRUIT

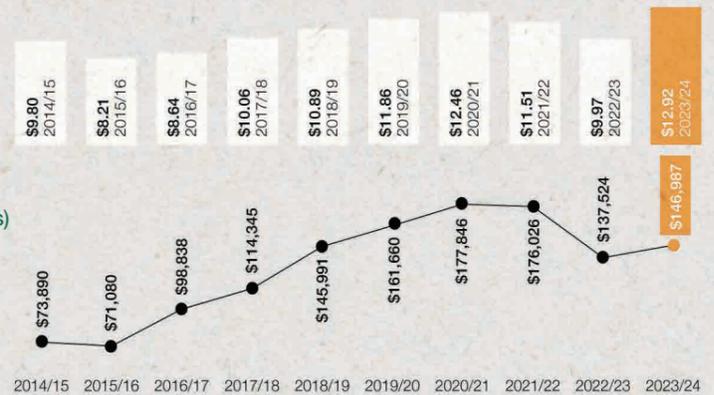
AVERAGE OGR PER TRAY

\$12.92

(Based on FY 2023/24 numbers)

Average OGR per hectare

\$146,987



KIWISTART IN A NUTSHELL

- Early season fruit that allows us to start the season strongly, maximising early season sales rates when we can get good returns from high quality fruit in a less congested market.
- If we don't meet early season demand through KiwiStart volumes, in a season like 2024 where we have a big crop, we end up selling later in the year where added costs can lead to a lower OGR.
- By harvesting in the KiwiStart period, a grower will forego some of the value of their fruit as a result of harvesting at a lower dry matter, or smaller size profile than if they had harvested at a later date.

Example: If we look at five-year average accumulation curves for fresh weight and dry matter, a conventional SunGold grower who harvested

in 2024 KiwiStart Week 11 (13 March) would forego \$1.28/TE in Fruit Value and Taste payments compared with if they harvested in Week 12 (20 March) – seven days later. This is based on the 2024 Indicative Maximum Taste Payment, and assumptions around Fruit Value contained in the KiwiStart Standard Cost Model. This amount (\$1.28/TE) is "priced into" the KiwiStart rates, which are modelled to provide appropriate compensation. Based on an average 2024 conventional SunGold KiwiStart yield of ~12,500 TE/Ha, this amounts to approximately \$16,000/Ha.

- As well as compensating for the fruit value and Taste that a grower foregoes from harvesting early, the KiwiStart rates are also designed to recognise the value this fruit brings to the pool and includes an appropriate level of incentive to ensure an early and consistent flow of fruit during the start of harvest.

STATUS OF ZGS DISCUSSIONS

In June, we announced we were progressing with industry discussions on the potential expansion of Zespri Global Supply (ZGS).

Since the launch of these discussions, we've engaged with more than 700 growers on the topic at Shed Talks, Roadshows, Fielddays, and more. We've had a dedicated page on Canopy, including a feedback form, and more than 500 of you gave your feedback via the regular grower survey. Head to Canopy or check out last month's *Kiwiflier* to read more about the feedback so far.

We're in the middle of reviewing all the available information to create a draft resolution for the potential Producer Vote for further discussion. This includes:

- Your feedback
- The latest supply and demand data
- Insights from the ZGS team, who understand the planting capacity and processes in the Northern Hemisphere
- Our ability to effectively execute our 12 month supply strategy to protect and grow your returns

The Board will be considering the feedback on 20 August and we will be communicating the next steps for the discussion following that. The following day is our AGM, and we'll be talking more about ZGS in that forum.

From there, we head into the Roadshows from 22 August. Check out the schedule on Canopy (also on page 16 of this issue of *Kiwiflier*), register, and head along. We'll be sharing more about ZGS, any potential resolution, and its rationale at those Roadshows. We look forward to welcoming some of our colleagues and partners from Italy to the sessions so you can hear from them directly.

Roadshows provide a valuable chance to provide feedback, and we intend to finalise any potential resolution in October. If you can't make it, the feedback form on Canopy will still be available, or you can chat to your GRM.

We'll run another grower survey in September to gauge sentiment again, and this will be a key factor in whether we go ahead with the Vote. The decision to proceed with a Producer Vote won't be made until late October.

If we do hold the Vote, the likely window will be late November – early December.

Our Northern Hemisphere supply is crucial to our strategy and ambitions. We will not be confirming a Vote unless we are confident that growers have been well informed, have had enough opportunity to provide input, and support the proposal. So please head along to grower events, use the various channels to ask your questions, and fill in the September grower survey when it hits your inbox.

SCAN ME TO FIND OUT MORE ABOUT ZGS ON CANOPY:



Or check out: [Canopy > Zespri Global Supply](#).

If you'd like to arrange a meeting to discuss with one of our grower engagement team, contact us via 0800 155 355.



TRIP REPORT: VISITING OUR ZGS OPERATIONS IN ITALY

A Zespri team visited Italy in late July to learn more about Zespri Global Supply. Tracy McCarthy, Executive Officer, Grower and Industry Engagement, led the trip and shares her reflections.

This wasn't my first trip to Italy to visit our ZGS growers, but it was certainly the most impactful. We were there to check in with the team and learn more about the ZGS business in the context of the current discussions to plant more SunGold hectares up there.

Spending time with growers is the best thing about my role, and it was no different with our Italian colleagues. Many of them are family orchards which have been passed through multiple generations and have been with Zespri for more than 20 years, starting out as Hort16a growers. They are sophisticated, motivated, and very passionate about growing kiwifruit.

They're also very proud and grateful to be part of Zespri. They're dedicated to us and really believe that our growing system and SunGold variety are the best in the world.

At the same time, there's anxiety and uncertainty about the future for them with Zespri. They want to be able to grow their businesses and to be part of our industry, but know that at this point we can't give them more opportunities with the current cap on ZGS SunGold hectares in place.

And these orchards are businesses, just like the orchards here in New Zealand. The growers are dedicated kiwifruit producers, some of them are multi-generational. SunGold is their preference, but they are going to grow kiwifruit, whether Zespri or not. SunGold is not the only yellow-flesh variety in Italy and we know that some growers have started growing competitor varieties because more SunGold hectares are not available to them. We did visit a competitor orchard and saw for ourselves a very healthy canopy of gold kiwifruit and a grower who says they're now committed to that variety.

As Andrea Contarino, one of our G3 growers and Red19 triallists said: 'The Italian industry is now a coiled spring – if there's another vote and it doesn't go positive, it will disperse the demand to other varieties. This is a turning point for the Italian industry'.



Gold kiwifruit on a competitor orchard.

Being in Italy is always a reminder that there is no better place on earth to grow kiwifruit than in New Zealand. The prevailing climate and lower soil organic matter mean that even the very best Italian growers struggle to replicate New Zealand orchard yields. However, one benefit from the hotter temperatures is very high dry matter across all sizes. They achieve on average higher dry matter than New Zealand growers. Quality is high and tests well with consumers, particularly in comparison to competing varieties, which shows the strength of Zespri having equivalent quality standards all over the world.

Kiwi ingenuity was also on show, and perhaps not exclusive to kiwis after all! This Brown Marmorated Stink Bug (BMSB) trap is cheap, effective, and has greatly reduced the population of BMSB on this orchard. The black sheet is sticky and the pheromones at the top attract the bugs. They get stuck, fall into the tub of soapy water, and can then be removed.



BMSB trap on a ZGS orchard in Italy.

We learned so much about the challenges our growers are facing, and the innovative solutions those growers are implementing with the support of our team there. Although it all happens on the other side of the globe,

I do believe the management of the challenges they're facing will ultimately benefit New Zealand growers as our climate changes, and things like warmer temperatures and higher rainfalls become more of a factor.

In the midst of a busy itinerary, including meetings with Grower Relations, Licensing, Post-harvest, Supply Chain, Quality, and of course the growers, it's always a proud moment to see New Zealand-grown kiwifruit commanding a premium on a European supermarket shelf. In a small supermarket close to our hotel, a four-pack of SunGold was €9.18 a kg. All other seasonal fruit hovered around the €2-3 mark.

Our strategy to maximise value for growers by constantly building demand and using a brand-led approach is working. We're just going to need more supply to keep it that way and to hold onto the growers who help us make it happen.



"THE (ITALIAN) GROWERS ARE DEDICATED KIWIFRUIT PRODUCERS...SUNGOLD IS THEIR PREFERENCE, BUT THEY ARE GOING TO GROW KIWIFRUIT, WHETHER ZESPRI OR NOT."

Tracy McCarthy, Executive Officer - Grower and Industry Engagement.

BENEFITS OF ZGS

ZGS is a critical value driver for the industry and a huge part of how we futureproof grower businesses and Zespri's position.

The benefits of ZGS can be summarised as follows:

-  **Supporting strong pricing:** ZGS protects our price premium through ensuring we maintain our channels and market position.
-  **Brand building:** Being on shelves year-round keeps Zespri in front of consumers, helping to build loyalty, recognition, and value.
-  **Ensuring good consumer eating experiences:** Ensuring Zespri-quality fruit is available means consumers have a consistent, positive experience of kiwifruit. Inferior fruit turns consumers off and erodes the value of the category for all kiwifruit brands.
-  **Relationships with retailers:** Retailers want kiwifruit all year. If they can't get it from Zespri, they'll look elsewhere. Being available keeps them committed to us.

-  **Relationships with growers:** We can keep the best ZGS growers growing for Zespri, rather than growing competitor varieties.
-  **Partnerships:** Having local production means more support from communities and regulators. ZGS was a key reason why the 8.8 percent tariff on our exports to the EU was removed. Growers paid \$50m in tariffs there in 2023.
-  **Biosecurity and innovation:** ZGS means year-round, global research on issues of critical importance including biosecurity and production.
-  **Supporting market access:** Having strong local relationships supports our ability to maintain our market access, including resolving challenges which arise.

All growers benefit from ZGS. Not expanding ZGS would mean we're leaving value for New Zealand growers on the table and challenging our ability to maintain the premium we're demanding now.





FRUIT QUALITY UPDATE

ONSHORE QUALITY

Overall onshore quality continues to be the best we have seen in five years for both SunGold and Green.

The levels of packing-related defects this year is lower than in 2023 and 2022, and are mostly driven by minor blemishes in SunGold, and a combination of cosmetic shape defects and blemishes in Green. Flesh damage in SunGold continues to track comparable to that of 2023 and 2022, but slightly higher than the average over five years.

We are entering that time of the season where storage defects starts increasing. In both SunGold and Green, the level of storage defects (NPF, soft fruit, and rots) is currently tracking the lowest in five years. The year-to-date fruit loss and repack rates are also currently the lowest in five years for both SunGold and Green.

OFFSHORE QUALITY

Overall, offshore fruit quality in both SunGold and Green is currently the best in five seasons.

The average in-market total defects is currently the lowest in five years for both SunGold and Green. NPF and other skin defects are tracking much lower than in any of the previous seasons across five years for both SunGold and Green. The level of soft fruit in SunGold is currently higher than 2023, but within acceptable levels for this time of the year. Physical damage is slightly higher than the average over five years, but still within acceptable levels.

Storage Breakdown Disorder (SBD) has been reported in SunGold across some markets. Current offshore SBD expression is linked to KiwiStart product, and the inventory risk is being managed by the markets. While this early incidence of SBD is higher than in 2023, the levels are generally low and acceptable.

The general view from the key markets is that quality continue to be better than previous years for both SunGold and Green, with positive feedback from customers.



View the SunGold and Green onshore performance and market quality rates year-to-date on Canopy: [Canopy > News > Fruit Quality Update - August 2024](#)

SCAN ME



SOFT FRUIT TESTER LAUNCH IN EUROPE

The Soft Fruit Tester (SFT), a rapid non-destructive testing device that allows more fruit to be inspected compared to the existing penetrometer technology, was launched in the European hubs for Supplier Accountability checking in July.

"The European implementation of the SFT is the result of many years of investigation into soft fruit detection technologies that has involved many people throughout the kiwifruit industry as well as various business partners," says Tim Mackle, Acting Chief Operating Officer.

Last year the device was trialed extensively in China, Taiwan and with New Zealand post-harvest operators.

"We're intending for the device to be implemented for New Zealand export checking and for arrival Supplier Accountability checking in all major arrival ports for the start of the New Zealand 2025 season."



CANOPY NEWS IN BRIEF

SPRAY SAFE!

It's Hi-Cane season, and everyone in our industry can play a role in ensuring we have a safe spray season. Good practices carried out by sprayers, was a key factor in helping the kiwifruit industry keep our ability to spray hydrogen cyanamide. This good practice must continue for us to protect this right.

We encourage you to report any practices you have seen that are unsafe or not part of our safe spray guidance. This is about ensuring good practice and safeguarding our right to spray into the future.

For a comprehensive and concise overview of the EPA controls of Hi-Cane, check out Canopy: [Canopy > News > Safe Spray Workshop Recap](#)

RSE WORKERS' SPORTS FESTIVAL CELEBRATING CONNECTIONS, FUN, AND CULTURE

Zespri is proud to be a sponsor of the inaugural RSE Workers' Sports Festival this year. It's the first time the kiwifruit industry has teamed up with rugby, football, and volleyball organisations, as well as local sponsors to celebrate the important role of our RSE community.

The RSE Sports Festival will be held on Thursday 22 August at Blake Park, Mount Maunganui with 400+ participants playing Rugby 7s, 6-a-side Volleyball and 7-a-side Football.

Find out more on Canopy: [Canopy > Events > RSE Workers' Sports Festival Bay of Plenty](#)

 [READ MORE ON CANOPY](#)

ZESPRI'S LILAH ROSENFELDT WINS BOP YOUNG GROWER 2024



26-year-old trials specialist at Zespri Lilah Rosenfeldt, was crowned 2024 Bay of Plenty Young Grower at the awards ceremony in Mount Maunganui in July.

"It was pretty special to have my entire work crew see me accept the award and my best friend – she's been my best friend since we were 12 and my biggest support," says Lilah.

Lilah was presented the award by Associate Minister of Agriculture and State for Trade, Nicola Grigg. She says while she did not expect to win, it meant a lot to have been recognised as the region's top young grower.

"I feel very shocked - it hasn't really sunk in yet," she says. "I feel very honoured."

Also in attendance were Tauranga and Bay of Plenty MPs Sam Uffindell and Tom Rutherford, Western Bay of Plenty Mayor James Denyer, Horticulture NZ Chairman Barry O'Neil, and NZKGI Chairman Mark Mayston.

Now in its 17th year, the Bay of Plenty Young Grower competition - MCd by comedian Pax Assadi and organised by NZKGI - aims to celebrate the future leaders of the horticulture industry.

The day-long competition, held at Mount Maunganui College and Mercury Baypark, saw eight contestants complete nine practical and theoretical tasks, finishing with a speech competition at the gala dinner.

Lilah won the horticulture agrichemical safety award and the Holland Beckett Speech Competition, impressing the judges with her three-minute speech on how Gen Z values unlock new levels of profitability in the horticulture sector.

"The day was really good," Lilah said. "I had a lot of fun completing all of the different tasks."

Lilah has been a part of the kiwifruit industry for about seven years and was an orchard manager for three of those years. She is currently a trials specialist at Zespri, carrying out research and conducting trials on kiwifruit orchards.

Lilah says she entered the BOP young grower competition to learn new skills, and meet people passionate about the horticulture industry.

Runner-up went to Jack Canham, who dominated the awards winning four of the 10 tasks, while third place went to Levi Horton.

Erin Atkinson, Chairperson of the Young Grower Bay of Plenty Upskilling Committee, says the calibre of contestants seemed to step up year after year.

"They are knowledge seekers, and extremely ambitious, which gives us the confidence that we are in safe hands heading into the future - they are an amazing group of contestants."

Erin says the Young Grower events were extremely important for the industry's future.

"The events help to connect people and mentor them through the next step of their careers - challenging them to think of the big picture."

Placing first won Lilah a car on a three-month lease from Farmer Auto Village and \$1,500, as well as a spot at the National Young Grower of the Year national finals in October.



FROM THE MARKETS

US: GREEN AND GOLD WORKING TOGETHER TO MAXIMISE GROWER RETURNS

In the context of the current conversation about potentially expanding ZGS, we've been talking about how having a full portfolio of kiwifruit is a critical part of building our brand and strengthening returns for growers. Whether you grow Green, SunGold, RubyRed, or a combination, your OGR is impacted by the 'halo effect' of the Zespri brand, as demonstrated in this case study from the USA, a market that has huge potential for us.

The successful relaunch of the US market demonstrates the value of having a strong brand and a portfolio of kiwifruit varieties to lift value across all varieties, as we have turned strong interest in SunGold into a key value driver for both Gold and Green growers.

While it is one of our fastest-growing markets with strong returns and growth potential as our brand draws more consumers to the category, it has a checkered history for kiwifruit.

New Zealand kiwifruit was first sold there in the 1950s and was the first market to use the name 'kiwifruit'.

However in 1992, our exports to the US were hit with a tariff when the US ruled New Zealand had dumped kiwifruit, significantly constraining our ability to sell there. This led to a failure to launch with the market becoming dominated by cheaper, inferior fruit which turned consumers off and collapsed interest in the category. Grower returns were poor, including a record low 18 cents per tray.

In 2015 - keen to diversify and find larger markets - Zespri launched a reboot of the USA business, led by SunGold.

Given it was new and different, SunGold generated excitement and a strong point of difference to re-capture retailer and consumer attention, giving the expanded team there the ability to engage directly with retailers to build interest in the category to drive consumer demand for both Green and SunGold.

The growth since has underlined the benefits of investing in our brand to generate interest and the importance of having a full portfolio of fruit available to build the category and support grower returns.

See the numbers to the right for just how successful that relaunch has been, and the next page to read about the strong growth in the organics category.

KEY FACTS

Zespri Kiwifruit is now outpacing total kiwifruit growth, with **A FOUR-YEAR CAGR (COMPOUND ANNUAL GROWTH RATE) OF 27 PERCENT - 15 POINTS HIGHER** than the category overall.

The **USA** is now among **THE TOP RETURNING MARKETS FOR GREEN**, behind only Japan and the Netherlands in Zespri's **MILLION TRAY PLUS (SALES)** markets.

The **2023 RETURN OF \$9.87 PER TRAY** in the US is also higher than the global average (excluding USA) of \$9.54. Between 2015 and 2023, the **INCREASE IN GREEN OGR FROM THE US WAS 138 PERCENT**, compared to the other markets (excluding USA) which saw an 81 percent increase.

SUNGOLD has been the **TOP-SELLING BRAND** in the category for the **4TH STRAIGHT YEAR**, but while SunGold has been the primary growth driver, **GREEN SALES** have also increased at a steady pace too - **UP 38 PERCENT OVER THE LAST FOUR YEARS**.

The halo effect is a key driver of value, encouraging people to try and fall in love with Green - **GREEN CLAMSHELL PRODUCTS SELL 32 PERCENT MORE** than other branded comparable green product **WHEN MERCHANDISED WITH SUNGOLD**.

Though still just scratching the surface in a market of 330 million people, total sales volume increased to **11.2 MILLION TRAYS IN 2023** with strong long term growth prospects.

Overall, **KIWIFRUIT** has become one of the **FASTEST GROWING ITEMS IN FRESH PRODUCE** and has moved from number 22 to **NUMBER 15** of fruits consumed by value.



Kiwi Brothers make a splash in Hollywood.



Green and SunGold at a Roche Bros supermarket in the US.



US: REDESIGNING PET FOR RECYCLABILITY WITH BERKELEY UC

Zespri has teamed up with students at the University of California, Berkeley in the United States as we look to tackle the issue of packaging recyclability.

The team of six students has been supporting Zespri in its work for three months with our commitment to make all of our packaging 100 percent reusable, recyclable or compostable by 2025.

The Zespri branded clamshell consumer packaging is made out of polyethylene terephthalate or PET and used in many of the markets where we sell our Zespri RubyRed, SunGold and Green Kiwifruit. The PET clamshells are a popular way to package our fruit as they enable great fruit visibility for consumers while doing a great job protecting the fruit and preserving quality.

The PET can be moulded into the clamshell shape, however recycling rates of this type of PET are quite low in most of our markets. This is a challenge we have been working to address with the University of California, Berkeley students tasked with creating a new design which can be made with the same manufacturing process as PET beverage bottles which have significantly higher recycling rates.

Zespri Innovation Leader - Packaging, Lou Sherman says it's been fantastic to team up with these students to investigate new ways of making our packaging more circular.

"We know our consumers want to see us make progress towards more environmentally friendly packaging solutions, so we are pleased to know there might be other options.

"It's also important because while paper packaging is in the spotlight as a more sustainable option because it's made with natural fibres and has a mature recycling infrastructure, the efficiency of plastics far outweighs paper in terms of carbon footprint and cost."

The research carried out by the university students also found that consumers understand that PET bottles and similar shaped PET packaging can be recycled.

Zespri will now take the learnings from the work with the students and develop prototypes for further testing. Once the recyclability challenge is solved the team will investigate the introduction of more recycled and/or biobased plastics to reduce the amount of virgin plastics made from fossil fuels and our environmental impact further.



Students at the University of California, Berkeley with the Zespri branded clamshell.

FROM THE MARKETS

US: ZESPRI ORGANICS ON THE RISE

With more organic supply this season for both Zespri Organic Green and Organic SunGold, there's a considerable lift in the amount of that fruit being made available to customers and consumers in the USA to meet increasing demand.

There'll be a 70 percent increase in Zespri Organic Green and a 50 percent increase in Organic SunGold for the US market, compared with 2023. The US is the world's largest organic market with strong consumer recognition and visibility in-store, and strong growth projections.

Zespri Organic Product Manager Tracey Armstrong says the increase means the US is set to become our number one Organic SunGold market this year, overtaking Japan.

"The US has made considerable gains to improve their returns for Organic Green and Organic SunGold in recent years and it's now a high returning market providing a strong foundation on which to build Zespri Organics in the world's largest organic market."

Zespri has been supplying the US with Organic Green and Organic SunGold for over a decade.

Zespri General Manager, North America – Darren LaMothe says we've had five straight years of growth in organic sales in the US, with a four-year compound annual growth rate (CAGR) of 92 percent.

According to North America's Organic Trade Association, organic products reached a new record return of \$70 billion USD last year and shoppers are looking for the USDA Organic label despite price inflation. This past season, Zespri Organic Kiwifruit experienced a dollar growth of 28 percent growth in value and 20 percent growth in volume in the US.

"Zespri has accounted for the majority of organic kiwifruit sales this past year, with growth driven by our one pound Organic SunGold pack," says Darren.

"Zespri's success with its organic varieties drives incremental dollars for the total category."

Zespri's organics marketing campaign 'Taste the power of nature' is in full swing with digital media, sampling activations and eye catching displays in store. Last year the campaign generated more than one billion impressions.

The US team has also recently sponsored and been an exhibitor at the Organic Produce Summit in Monterey, California.

"We are energised by the steady growth of organic fruit sales and are passionate about continuing the momentum with Zespri leading the kiwifruit category," says Darren.

"It was great to recently attend the Summit and meet with retailers to discuss how to increase sales of their Zespri Organic Green and Organic SunGold Kiwifruit through the sharing of helpful industry information, support materials and knowledge to customise programmes just for them."



SPAIN: 'FEED THE BEAR' ACTIVATION SHOWS IMPACT OF DIET CHOICES

Back in May, our team in Spain launched a campaign to analyse the daily diet of Madrileños, in a game called 'feeding the bear', assisted by a giant Tamagotchi in the shape of a bear named Madrid.

This project aimed to raise awareness about the importance of maintaining a balanced diet and motivate people to adopt healthy eating habits. This initiative was developed with the advisory support of the Spanish Nutrition Foundation (FEN), the only Spanish member of the European Nutrition Foundations Network (ENF).

The bear's health varied depending on what food intake data was entered. On some days it displayed a healthy, energetic state, positive attitude, and good physical abilities related to mobility and lung capacity. However, when the diet intake recorded during the activation was not positive, it showed lower energy, mobility, and motor skills.

Now the results are out, and they show Madrid citizens have diets high in sugar and fat and low in fibre. Using that information, the team conducted a national survey with 2,000 participants to dig deeper and extract conclusions with robust statistical support.

The survey results echoed the initial observations. Despite 60 percent of Spaniards believing they eat healthily, many still regularly indulge in ultra-processed and sugary foods.

To share these findings, the team held a press conference led by TV icon Roberto Leal and nutritionist/chef Marta Verona.

The attendees' keen interest in the shared insights was encouraging. It reaffirms the team's commitment to pushing the Zespri cause further; getting more and more people to make healthy choices day by day.



UK: ZESPRI BOLSTERS TESCO PARTNERSHIP TO DRIVE KIWIFRUIT CATEGORY GROWTH

Zespri has teamed up with UK retail giant Tesco to introduce fully branded Zespri Kiwifruit SunGold packs.

The aim of the new pack, which holds four Zespri SunGold Kiwifruit, is to help increase awareness and penetration of the variety, while also growing the overall kiwifruit category. SunGold is also now available at Tesco as a loose 'jumbo size' fruit.

Zespri Market Manager – UK and Ireland, Susan Barrow Dodd says we are committed to working with our longstanding partner, Tesco to raise the profile of the kiwifruit category.

"Previously our SunGold Kiwifruit were packaged under the Tesco brand with the move to the Zespri SunGold brand a major step change for the wider category."

The launch of the packs coincides with the new "Taste the Obsession" consumer campaign, with media, influencers and consumers encouraged to try SunGold and share their 'taste obsessions'.

"This will enable us to form a deeper connection with consumers, communicate the passion that lies at the heart of our grower-owned brand, and boost overall kiwifruit consumption," says Susan.

"Although we are making good progress in kiwifruit consumption in the UK, we are still a long way behind the penetration across the rest of Europe, with many consumers still unaware of the excellent health benefits the fruit offers."

Tesco's exotic fruit buyer Olivia Kirkwood says kiwifruit is growing in popularity with our customers,

"We're really excited to be working with Zespri to add to our offering with this deliciously sweet gold variety."

The new pack can be recycled through normal kerbside recycling.



UK: 'TASTE THE OBSESSION' GOES LIVE!

In the UK, our very first consumer-focused media campaign, 'Taste the Obsession!' has gone live. This is a milestone moment in the UK as we partner with Mindshare to drive reach and awareness about our delicious SunGold.

Zespri growers are committed to producing the best-tasting kiwifruit. This summer, we are inviting UK consumers to discover why our growers are so 'obsessed' with growing the very best SunGold.

Marketing manager Libby Drake says the campaign highlights the passion and care that goes into growing our kiwifruit.

"We have a job to do in terms of building brand awareness and product knowledge in the UK, similar to our journey in the US," says Libby.

"While 'Taste the Obsession' is our tagline, our primary message centres around the word 'besotted', which beautifully links with love and obsession."

The campaign kicked off via online video, social media, and video on demand. Additionally, activity includes a robust shopper marketing campaign with Tesco, spanning radio, in-store sampling, digital in-store banners, Zespri-branded packaging, loose assortment, magazine features, and more.

"Tesco is the largest retailer in the UK with 27 percent market share and we have

chosen them not only because of their size, but most importantly because its shopper profile is well linked with the shopper profile we're targeting in the UK," says Libby.

"What is most exciting about this Tesco opportunity is it allows us to replicate the playbook that has been so successful for Zespri globally, and achieve brand-led consumer awareness."

To create buzz, consumers are being encouraged to share their SunGold taste obsessions online. Various PR touchpoints, such as influencers, podcasts, a Hello! Magazine partnership, and a mass sampling drive at Kings Cross train station across two days in August will also help boost the campaign.



Check out 'Taste the Obsession' campaign: <https://www.youtube.com/watch?v=w00dPyHunEQ>



ZESPRI GLOBAL SUPPLY UPDATE

KVDS RECOVERY PROJECT: A COMPREHENSIVE APPROACH TO ROOT HEALTH RESTORATION

Kiwifruit Vine Decline Syndrome (KVDS) is a physiological decline in root health caused by the loss of soil structure and health, a key factor being inappropriate water management in orchards (irrigation and drainage). Soils affected by KVDS have reduced biodiversity, which decreases their ability to regulate plant-microbiome interactions, leading to a state of dysbiosis where common soil pathogens proliferate.

Our ZGS Innovation team has launched several projects to address KVDS, focusing on irrigation trials, water and soil management, soil health research, the development of NDVI (Normalized Difference Vegetation Index) and DSS (Decision Support Systems), soil mapping, testing future rootstocks, and replanting activities.

As part of this effort, our ZGS Orchard Productivity Centre (OPC) team has provided support for disseminating research results through organising events and creating and distributing resources.

In March, ZGS also launched the Root Recovery Project, with the goal of demonstrating how to restore a healthy root system through a change of agronomic practices, including irrigation in a series of orchards at the initial stages of KVDS.

The project involves 12 orchards, where management will be supported using probes, weather stations, soil health studies, etc. It involves collaboration between Zespri, growers, and technicians of producer organisations. Each situation requires a targeted approach. Since the launch of the project, the team has gained significant knowledge and experience by examining various root systems across Lazio. Insights into the variability of root health within an orchard and the relationship between canopy status and root status are being gathered. This project will be reviewed annually based on new research findings and lessons learned from practical management. Further dissemination activities will be set up with active participation of the first group of growers.

Grower Robbie Mayston, who joined the ZGS team on several orchard and grower visits targeted for the Root Recovery Project, shared his observations:

"One thing I've noticed is growers are very engaged with their soil and irrigation management," says Robbie.

"These guys have to be really attentive to how much water they're putting on and when they're putting it on - they have different expertise compared to what we need in New Zealand, and their temperatures are very different as well.

"KVDS is an ongoing issue in Italy, and the Zespri team is doing amazing work in getting a better understanding of what's going on," says Robbie.

"It's hard because a lot of what's happening is below the surface, and seeing the work Zespri's doing, especially around digging the roots and excavating quite deep, is really interesting.

"It's providing a good understanding of what's happening below and helping with irrigation management and other orchard practices that growers can change to improve plant health."

The support from approached growers has been excellent, with fruitful discussions in the orchards. Plans are in place to include two French orchards and one Greek orchard in the programme before the end of the year. The ZGS OPC Europe team will form a coordination group to share experiences and observations, maximising learning and support quality, and dashboards and indicators are being set up to closely monitor the project's progress.

The research is translatable to other locations; and by understanding the root causes of KVDS, and identifying proven, sustainable solutions, we expect growers in New Zealand will benefit hugely from this project. Changes in weather patterns because of climate change are partly to blame for syndromes like KVDS, and Italy will not be the only growing region in the world to feel this impact in the coming years. Gisborne, for example, experienced similar

vine decline after last year's floods. Recovery efforts from extreme weather events like Cyclone Gabrielle which resulted in extremely damp soil and wet-footed vines, will be able to draw on learnings from projects like this one.

By addressing the root causes of KVDS and implementing targeted interventions, this project aims to create sustainable solutions for kiwifruit growers, ensuring the long-term health and productivity of orchards in both hemispheres.

"BY UNDERSTANDING THE ROOT CAUSES OF KVDS, AND IDENTIFYING PROVEN, SUSTAINABLE SOLUTIONS, WE EXPECT GROWERS IN NEW ZEALAND WILL BENEFIT HUGELY FROM THIS PROJECT."



GROWER PERSPECTIVE

ROBBIE MAYSTON'S VISIT TO ITALY

Robbie Mayston joined the ZGS team in Italy for two weeks in June, attending our Bounty Field Day, Red19 Field Day, and Canopy Management Field Day.

It was also a chance for Robbie to get an in depth understanding of two of ZGS' main growing regions, totalling 2,200 hectares.

"In the Lazio and Calabria regions we have visited many orchards talking to growers through their season and any challenges that they have with their growing," says Robbie.

"I've really enjoyed my time in Italy and it certainly is a very different place to growing in New Zealand.

"We have our challenges and they have their challenges here in Italy, but I think there's opportunities around increasing productivity.

"It certainly has been an eye-opener for me that SunGold is not the only variety being grown.

"The competition is tough and Zespri's support seems to be the best for growers, but it's something not to be taken for granted that SunGold is not the only gold variety that can be grown in Italy."



Task Force Field Day in Romagna.



Task Force Field Day in Calabria.



ZESPRI GLOBAL SUPPLY UPDATE

GROWER PERSPECTIVE

GROWER PARTICIPANT LUCA CAPPELLINI AND THE LUMA AGRICULTURAL COMPANY

Located in the province of Rome, the Luma Agricultural Company was founded in the late 1950s by Luca's grandfather. It began with the cultivation of grapes and later established itself among the first companies in the province of Rome to plant green kiwifruit between the late 1970s and early 1980s.

After his grandfather's passing, Luca's parents managed the company until 2016, the year Luca took the reins. One of Luca's initial steps was to participate in a tour organised by Zespri in New Zealand to deepen his understanding of the cultivation of SunGold.

During the Zespri tour, Luca had the opportunity to closely observe both the structures and the cultivation techniques, leading him to decide to introduce this new variety to his company. The SunGold variety, in fact, showed him a potential for success even greater than that of Green kiwifruit.

In 2017, Luca planted his first hectares of SunGold, becoming the first grower in the province of Rome to adopt this crop, in a way repeating his grandfather's

innovation with Hayward. Today, the Luma agricultural company boasts a total of 10 hectares dedicated to the cultivation of SunGold.

Luca spoke highly of the Root Recovery Project's effectiveness, particularly in diagnosing issues like collar rot and implementing appropriate agronomic practices.

"The project is absolutely useful and well-structured and I am happy to participate and support the project," he says.

"The number of companies involved is just right to tackle various situations while still providing efficient support to all participants, and the approach is correct: we examine the external condition of the plant, including the canopy and trunk, and then assess the soil through digging, which is not normally visible."

Luca encourages fellow growers to embrace change gradually, emphasising the shared goal of maintaining healthy, sustainable orchards for long-term economic viability.



ZGS OPC team with Robbie Mayston and grower Luca Cappellini at his orchard, performing some digging as part of the Root Recovery Project.

FRANCE: ZGS GROWER PROFILE - AGNÈS LASSALLE

Meet Agnès Lassalle, a dedicated kiwifruit grower in France, who has been working on her family farm in Saint-Pé-de-Léren since she took over in 2020.



Agnès and her mother Pierette in their orchard.

Agnès' dedication shines through as she continues the legacy started by her parents, who began working with Zespri in 2003. Today, Agnès manages nine hectares of Zespri Kiwifruit, divided into 5.5 hectares of Gold3 and 3.5 hectares of Hayward, along with 40 hectares of maize.

A FAMILY TRADITION OF EXCELLENCE

Agnès' parents, Bernard and Pierrette, were pioneers in the French kiwifruit industry, growing the Hayward variety since 1992. Their commitment to quality led them to embrace the Zespri partnership early on.

"When the Hort16a variety arrived in France, my father didn't hesitate, he wanted to plant it," Agnès recalls.

This collaboration has allowed them to stay at the forefront of kiwifruit innovation, particularly with the introduction of Gold3, which Agnès continues to cultivate today.

COMMITMENT TO QUALITY

For Agnès, producing high-quality kiwifruit is a source of immense pride.

"I am quite proud to produce a fruit that all consumers look forward to," she says.

The positive feedback on the taste, quality, and appearance of Zespri Kiwifruit is a testament to her hard work and meticulous attention to detail.

"Hearing positive feedback on the taste, quality, and shape is very rewarding," Agnès adds.

OVERCOMING CHALLENGES

Growing kiwifruit is not without its challenges. Agnès faces issues such as unpredictable weather, pests, and diseases like Psa. However, she remains resilient, employing winter treatments and adapting to new pest management strategies, such as installing traps and using authorised pesticides.

"The stink bug is a difficulty, and we've adapted by installing traps and using treatments like Deltamétrine," she says.

Labour management is another hurdle, but Agnès finds flexibility through employer groups, ensuring she can maintain her operations despite these difficulties.

"It's stressful, but we manage - with employer groups, we have more flexibility," she says.

LOOKING TO THE FUTURE

Agnès is optimistic about the future of her farm. With 20 more years of work ahead, she plans to rejuvenate her older Hayward plots, which are showing signs of decline.

"The oldest Hayward plots, some are 32-34 years old, are starting to decline. If I have the possibility, I'd like to replace them," she notes.

Her vision includes planting more Gold3, having already planted 1.20 hectares since taking over. She also contemplates converting some of her maize fields into kiwifruit orchards to expand her production.

"I have three hectares of land next to my existing blocks where I still grow maize.

"My idea is to plant kiwifruit there, particularly the Bounty cultivar, which I'd be keen to try, given my typology of soil and risk of flooding," she says.

"This strategic move will help me gain a deeper understanding of the new rootstock characteristics and understand the plant better."

Agnès' journey as a kiwifruit grower is marked by her commitment to quality, resilience in the face of challenges, and a forward-thinking approach to farming. Her father Bernard passed away suddenly in 2021, shortly after Agnès had started working on the family farm. Nonetheless, her dedication has ensured that the family tradition of producing kiwifruit continues to thrive, promising a bright future for her farm and the consumers who enjoy Zespri products.

"I AM QUITE PROUD TO PRODUCE A FRUIT THAT ALL CONSUMERS LOOK FOWARD TO."
AGNÈS LASSALLE



Agnès' SunGold production during the 2023/24 season.

9 HA OF ZESPRI KIWIFRUIT



5.5 ha Gold3



3.5 ha Hayward



40ha of maize



SAINT-PÉ-DE-LÉREN, FRANCE



SHARES UPDATE: JULY

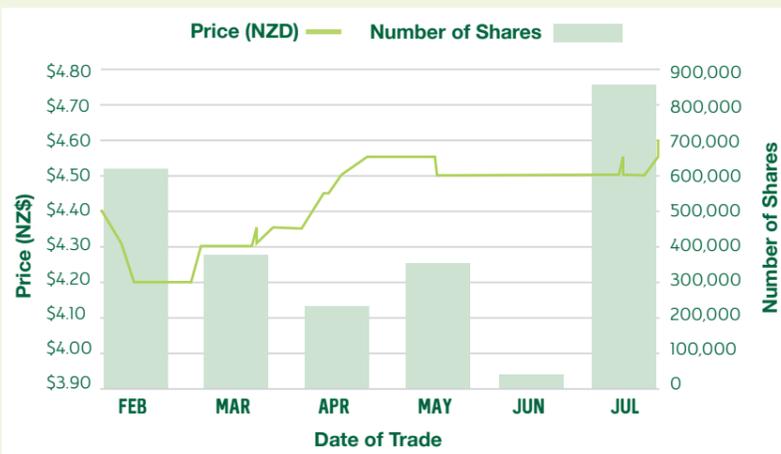
WHAT'S HAPPENING IN THE MARKET

BIDS (BUYERS)		
Orders	Quantity	Price (\$)
1	64,552	\$4.55
1	19,490	\$4.50
1	3,000	\$4.50
1	20,000	\$4.40
1	3,000	\$4.40
1	20,251	\$4.35

OFFERS (SELLERS)		
Orders	Quantity	Price (\$)
1	3,000	\$4.70
1	3,000	\$4.80
1	10,000	\$5.25

LAST 10 TRADES			
Date	Quantity	Price (\$)	Value (\$)
23/07/2024	3,000	\$4.60	\$13,800.00
23/07/2024	175,000	\$4.55	\$796,250.00
23/07/2024	2,118	\$4.55	\$9,636.90
19/07/2024	142,790	\$4.50	\$642,555.00
16/07/2024	133,280	\$4.50	\$599,760.00
15/07/2024	10,000	\$4.50	\$45,000.00
12/07/2024	4,000	\$4.55	\$18,200.00
12/07/2024	20,000	\$4.50	\$90,000.00
11/07/2024	85,710	\$4.50	\$385,695.00
10/07/2024	20,510	\$4.50	\$92,295.00

ZESPRI GROUP LIMITED SHARE TRADES: FEBRUARY 2024 TO JULY 2024



The graph above shows the price per share that has been traded with USX and the total number of shares traded.

WANT TO DISCOVER MORE?

To get a list of the price for current buyers and sellers, Market depth, last 10 trades, and market announcements go to <http://www.usx.co.nz>. The Zespri Group Limited listing code is 'ZGL'.

Follow us on **reap** for our mobile IR experience

Go to www.reapapp.io to download the app.

Please note that at any time that content for the *Kiwiflier* is finalised for publication, there may be some trades associated with director entities which have been matched and transacted, but the paperwork has not yet been received by Zespri or Computershare. As such, there may be some lags in reporting trading by entities associated with directors. Zespri will however ensure that as at the end of each month, the Director Share Holdings and Transfers document on the Zespri Canopy website will always provide the most up to date information held by Zespri.

SHARES AT A GLANCE AS AT 24 JULY 2024

OVERSHARED SHARES REQUIRED TO BE SOLD - AUGUST



The Constitution requires shareholders who are over their share cap (overshared) to sell their excess shares three years after the date they exceeded their share cap.

DRY SHARES CONVERTING TO B CLASS - AUGUST



The Constitution states that Dry Shareholders (growers who no longer supply Fruit to Zespri) will cease to receive dividend payments three years after becoming Dry and will be converted to B class shares.

TOTAL NUMBER OF CLASS B SHARES AS AT 24 JULY 2024



This is the number of shares that are no longer eligible for dividend payments.

DIRECTOR SHARE TRADING AS AT 24 JULY 2024



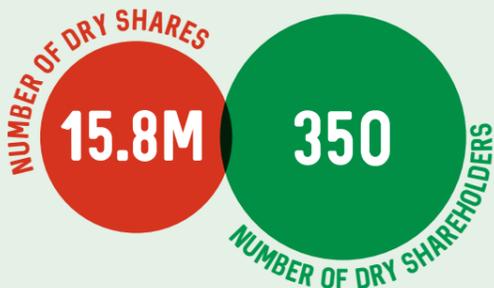
Shares traded by entities associated with Zespri Directors.

OUR SHAREHOLDERS

- Shareholder Producers
- Non-shareholder Producers

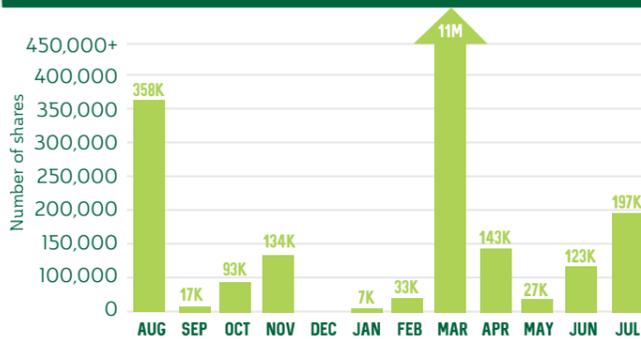


DRY AND OVERSHARED SHARES

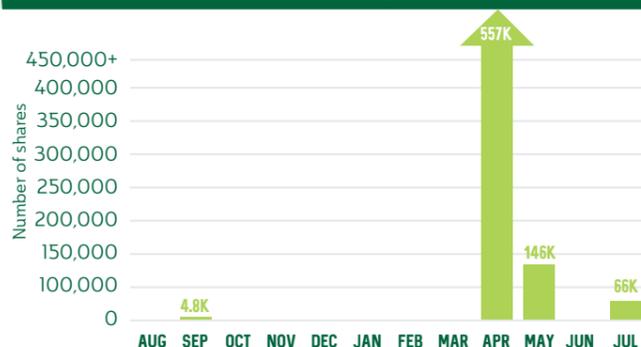


DISCLAIMER: The above figures are a snapshot in time and are subject to change at any time due to shares being traded.

DRY SHARES CONVERTING TO B CLASS BY MONTH B CLASS SHARES ARE NOT ELIGIBLE FOR DIVIDENDS



OVERSHARED SHARES REQUIRED TO BE SOLD



LOOKING TO BUY ZESPRI SHARES?

WHO CAN PURCHASE SHARES?

Our current producers are eligible to purchase shares in Zespri. The share entitlement for each landowner and lessee of a current producing orchard is calculated based on the historical production of the orchard(s). Contact us if you would like more information about your share entitlement.

OFF-MARKET TRADING

This is a share trade that does not involve a broker. The buyer and seller will agree on a price, complete an Off-Market Transfer form and return this to Zespri for processing.

ON-MARKET SHARE TRADING

Your broker will assist you to register your account with them and trade on your behalf through the Unlisted Securities Exchange (USX) platform. Once you are registered, they take care of most of the paperwork for you.

CHOOSE A USX-APPROVED BROKER



SHARES AVAILABILITY BOARD

The Shares Availability Board on Zespri's Canopy website is a place for sellers to advertise their shares for sale, and for buyers to advertise their interest in purchasing shares. This board is solely for matching buyers with sellers. Zespri will not be involved in matching parties or setting a price for the sale of shares.

There are currently two listings of shares for sale for a total of 74,993 shares, and 11 buyers seeking 621,000 shares on the Shares Availability Board: <https://canopy.zespri.com/full/dashboard/supply-and-operations/your-orchard-business/shares/shares-availability-board>.

You can register your shares for sale, or your interest to buy shares at the above link.

If you don't have access to the Canopy as a dry shareholder, please get in touch with the Zespri Shares team.

2024/25 PROGRESS PAYMENTS FOR AUGUST AND SEPTEMBER

CLASS 1 - APPROVED PROGRESS PAYMENT 15 AUGUST 2024	AVERAGE ON NET SUBMIT	16/18/22	25/27	30/33	36	39	42	46
Zespri Green	\$0.05	\$0.05	\$0.05	\$0.05	\$0.05	\$0.05	\$0.05	No supply
Zespri Organic Green	\$0.29	\$0.15	\$0.05	\$0.20	\$0.30	\$0.30	\$0.40	No supply
Zespri Gold3	\$0.63	\$0.39	\$0.52	\$0.84	\$0.95	No supply	No supply	No supply
Zespri Organic Gold3	\$0.05	\$0.05	\$0.05	\$0.05	\$0.05	No supply	No supply	No supply
Zespri Red19	\$0.72	\$1.80	\$1.40	\$1.10	\$0.75	\$0.75	\$0.70	\$0.65
Zespri Green14	\$0.23	No Payment	\$0.05	\$0.25	\$0.25	\$0.25	\$0.15	No supply

CLASS 1 - INDICATIVE PROGRESS PAYMENT 13 SEPTEMBER 2024	AVERAGE ON NET SUBMIT	16/18/22	25/27	30/33	36	39	42	46
Zespri Green	\$0.05	\$0.05	\$0.05	\$0.05	\$0.05	\$0.05	\$0.05	No supply
Zespri Organic Green	\$0.11	\$0.05	\$0.05	\$0.20	\$0.10	\$0.10	\$0.05	No supply
Zespri Gold3	\$0.41	\$0.40	\$0.40	\$0.40	\$0.45	No supply	No supply	No supply
Zespri Organic Gold3	\$0.07	\$0.05	\$0.05	\$0.10	\$0.10	No supply	No supply	No supply
Zespri Red19	\$0.19	\$0.05	\$0.05	\$0.05	\$0.30	\$0.30	\$0.15	\$0.10
Zespri Green14	\$0.66	No Payment	\$0.05	\$0.70	\$0.70	\$0.70	\$0.60	No supply

1. Progress payments for Class 1 are paid on submitted trays and reversed for onshore fruit loss.
2. Net Submit trays = gross submitted trays less onshore fruit loss trays.

FINANCIAL COMMENTARY

Progress payments

Progress payments have been calculated to ensure cash is returned to the grower as quickly as possible and fairly across all sizes. Payments have been set so that the percentage of total fruit and service payments across the sizes are equal where possible. Consideration is given to current season sales, cashflow, prior season percentage of total fruit and service payments paid at the same time of the season, other current season risk factors and also taking into account the latest information available.

August 2024 approved progress payments on Net Submit trays

Approved per tray progress payments for 15 August 2024:

Class 1	
Zespri Green	\$0.05
Zespri Organic Green	\$0.29
Zespri Gold3	\$0.63
Zespri Organic Gold3	\$0.05
Zespri Red19	\$0.72
Zespri Green14	\$0.23

September 2024 indicative progress payments on Net Submit trays

Approved per tray progress payments for 13 September 2024:

Class 1	
Zespri Green	\$0.05
Zespri Organic Green	\$0.11
Zespri Gold3	\$0.41
Zespri Organic Gold3	\$0.07
Zespri Red19	\$0.19
Zespri Green14	\$0.66



LOGGING INTO CANOPY

We've heard about growers experiencing some login problems with Canopy, and we're working hard to fix them. However, to do that, we need your help.

If you've experienced any issues, please let us know the time and date they occurred. You can do this by filling out a form available on the sign in page, or by getting in touch with us on **0800 155 355** or at contact.canopy@zespri.com.

We've also included some steps below that you can use to troubleshoot and assist you in the login process.

Receiving your login details: If you had an account on the old Canopy site, your login credentials are the same for the new Canopy site. If you've forgotten your

password, click 'forgot password' to reset it. If you're a new user, click 'register for an account'. If you've forgotten your username, please get in touch with us.

Clear cookies/cache: Accidentally saving incorrect credentials in your browser and overloaded browser history can cause login issues. To address this, clear your credentials, cookies, and cache by accessing your browser history (usually found in the top right corner) and selecting 'delete browsing data'.

Internet browser: If you're using Safari, try logging into Canopy through Chrome.

Session expires: For security reasons, users will be automatically logged out after a certain period of inactivity. Make sure to save your favourites and set up your quick links



for easy access to pages and resources when you log back in.

Logging into MCS/Spray Diary: While we do have a single sign-in process with these platforms and Canopy, there are times when the process doesn't work. Let us know if this is the case and in the meantime, please try using the same login credentials for the MCS and Spray Diary that you used for Canopy.

Tried the above steps and still can't log in?

Contact us on **0800 155 355** or email contact.canopy@zespri.com so we can help.

PROTECTION FROM HAIL: CHECK IF YOU'RE COVERED

While the Zespri Pool Distribution Policy for Hail Damage provides some protection to all growers, additional measures could be considered to assist with reducing the impacts of hail losses, or for providing extra financial support should your orchard be struck.

As the Zespri Policy does not provide full compensation against hail losses, growers who seek a higher level of compensation from losses can consider:

- Additional available private hail insurance options.
- Discussing with your insurance advisor parametric options (an alternative to traditional insurance that offers pre-specified payouts based on specific criteria being met).
- Discussing with grower entities entity level covers where available.

Hail nets over canopies are also an available means for protecting the fruit and vines from hail.

Growers should closely examine the Zespri Policy and their risk exposure to hail events and be aware:

- The policy is for the loss of individual Zespri Class 1 Standard Supply Kiwifruit which is damaged by having been directly struck by hail whilst on the vine and is unable to then meet Zespri export standards as a result of that hail strike.
- There is an applicable deduction (10 percent of potential yield of each variety) under the policy.
- The policy does not provide full compensation against hail losses.
- There may be additional costs or losses associated with a hail event that are not covered under this policy.
- In the event the aggregate amount of eligible Distributions for a variety exceeds the Maximum Aggregate Distributions limit per variety, then the total assessed Distributions will be pro-rated down.

For further details please refer to the Zespri Pool Distribution policy for Hail Damage included as an insert in this issue of *Kiwiflier* and updated for the 2025 season. You can refer to Canopy for more information: [Canopy > Supply & operations > your orchard business > Insurance & risk > Hail damage support](#)

If you have any questions, please contact the **Zespri Insurance team** (insurance@zespri.com) or **Grower Support Services** (contact.canopy@zespri.com or 0800 155 355).



SHED TALKS BRINGS TOGETHER 400 GROWERS

Zespri's third series of Shed Talks has just wrapped up, and it was great to bring together so many people from our kiwifruit growing community. We held 14 Shed Talks across 13 regions, with approximately 400 people participating.

There were some great discussions and valuable perspectives collected. These are now being sorted and distilled into actionable insights that will help shape initiatives for the upcoming season and beyond.

- Feedback from the GAP education station is being used to inform the next 12 to 18 months of changes happening in the compliance and regulatory space. The team really appreciated hearing how they can change and simplify things to make ongoing compliance education easier for you.
- The comments received via the grower digital tools station are currently being analysed and will feed into the next phases of design for products that will become the future of Zespri's digital tools, which we'll be starting to co-design with members of our growing community.

- The third and fourth stations were all about our ZGS strategy and expansion and have given us a great view on what more growers would like to understand about our northern hemisphere production business, and how we can do better to report and inform on what is happening there.
- The Listening Post offered a chance for participants to share what topics were on their minds and the messages you think Zespri needs to hear. Some of the most common topics we heard about included feedback on maturity clearance and residue testing, our new cultivars programme including what's coming through the pipeline, feedback on the Canopy website, and discussion about commercial drivers including shares and industry decision making. We'll be sharing with you over the coming months what we're doing to address what you shared with us.

A big thank-you to all the growers who hosted us, and to all those who attended this round of Shed Talks. The format has been well received with strong, positive feedback from all regions. We are looking forward to continuing the conversations with our kiwifruit growing community.





UPDATES FROM OUR PRE-HARVEST TEAM



Thank you to all growers who made it to our Shed Talks and shared feedback on our Zespri GAP Refresh Project and training plans for the year ahead.

Growers indicated the project is on the right track by supporting growers with training, ensuring the audit model is fair and fit for purpose, and creating online tools to make compliance easier. They were pleased to see pain-points from last year turned into focus areas for training this year, confirming they would like us to simplify GAP through regular bite-sized updates through the year, reducing repetition where possible, and providing clarity on contractor requirements. Support to better understand environmental areas such as biodiversity and greenhouse gases were also highlighted.

WHAT TO EXPECT

Changes to the Grower Manual will be finalised and uploaded to Canopy on 1 August. Changes include some clarification of criteria, a reduction in the number of documents orchardists need to get from their contractors, and a change to the Biodiversity section, including a new Biodiversity Plan Form.

The Global Extension Team will be providing support for GAP again this year focusing in on the areas growers noted at Shed Talks. We will also have a slot at the GET Spring Field Days and you can expect to see support resources (written and video) on Canopy. See here: [Canopy > Producing kiwifruit > GAP for orchards > Support for GAP](#)

TIMELY TIPS FOR GAP

Planting or grafting?

You must keep full traceability records showing where it came from (ensure it's from a certified nursery or KPIN approved to supply propagation material), when it was planted/grafted, the rate and method used.

Agrichemicals

Now is a good time of year to review/create your property spray plan for each KPIN to ensure it remains up-to-date. It's all about mitigating the impact of agrichemicals on the orchard surroundings and keeping people safe. The Property Spray Plan Form can be found here: [Canopy > Tools > Manuals > Grower Manual > Agrichemicals > Agrichemical understanding and planning](#).

Tip: If you use the same sprays and timings on multiple KPINs, they can be combined on one spray plan.

You might need to work with your spray contractor to update or create these plans and you should provide the Property Spray Plan to the applicator so they are aware of all sensitive areas before spraying. It also allows them to complete their spray job sheet and be familiar with the re-entry and notification systems specific for the orchard to ensure that their part in these processes is completed.

Invoices

When buying your agrichemicals, remember to keep and file the invoice or receipt for your reference and GAP records.

Tip: Take a photo of your invoice and email it to yourself to file on your computer.

BREEDING INTO THE FUTURE WITH THE KIWIFRUIT BREEDING CENTRE



With the Kiwifruit Breeding Centre approaching its third anniversary, the team continues to work to enhance the quality, variety, and sustainability of New Zealand-grown kiwifruit. First set up in October 2021, its cutting-edge facilities ensures Zespri remains a leader in the global fruit bowl.

Leadership

As a 50/50 joint venture between Zespri and Plant & Food Research, KBC plays a pivotal role in the kiwifruit industry with the Board including two representatives from each (an executive manager and Board member), as well as an Independent Chair. Our Senior Leadership Team also has expertise in new cultivar development, pre-commercial and commercial experience, and leadership within Crown Research Institutes (CRIs).

Accelerated research

KBC uses advanced research and innovative technology to develop new kiwifruit varieties that are more resilient to pests and diseases, as well as deliver improved yields and quality. These enhanced cultivars help growers achieve higher productivity and profitability while meeting the evolving demands of customers and consumers around the world.

The team of scientists and horticulturists use traditional breeding techniques and modern technology to create kiwifruit varieties with improved taste, texture, and nutrition. They benefit from access to the latest technology and world-leading science developed at Plant & Food Research, the largest germplasm collection outside of China, and an extensive phenotypic

database developed over 30 years to support breeding efforts. Through market research and consumer insights from Zespri, these improvements are tailored to meet consumer preferences.

By the numbers

KBC's kiwifruit breeding programme is the largest in the world, with over 100 hectares of research orchards across New Zealand (from Kerikeri to Clyde) and Italy (from Veneto to Calabria). To ensure continual progress within parental and breeding populations, KBC germinates nearly 100,000 seeds and plant approximately 30,000 vines annually.

The breeding process

Excluding parental development, the breeding process involves two stages, each spanning four to five years to produce sufficient fruit for evaluation. In Stage 1, hundreds of thousands of individual seedlings grown on their own rootstocks are cultivated, while Stage 2 involves grafting potential candidates across multiple sites, with 200-300 plants assessed per year.

KBC Senior Leadership Team



Dr Matt Glenn
Chief Executive Officer



Dr Roger Hellens
Chief Technology Officer



Dr Bart Challis
Chief Commercial Officer



Jayne Chamberlain
Chief Operations Officer

Every year, KBC recommends a select few elite cultivars to Zespri for pre-commercial grower trials.

Additionally, KBC has a significant rootstock and male programme and are at the forefront of introducing new genomic technologies, digital and data capabilities, and advanced orchard management techniques to develop superior cultivars more efficiently.

Current focus

KBC's current focus is on ensuring it optimises the portfolio of candidates within the breeding pipeline. This involves referencing the historical and current performance of all of our Zespri-derived cultivar targets at each stage within the pipeline, which is used to model timelines and probability for delivering pre-commercial candidates to Zespri. Armed with this information, KBC can then ensure breeding activity, as well as tool and technology deployment, are focused on maximising the likelihood of meeting Zespri's innovation goals.

Better fruit

KBC represents progress and growth for the New Zealand kiwifruit industry. Its commitment to research, innovation, and sustainability is shaping the future of kiwifruit.

Stay tuned for updates on KBC's progress as it strives to create, more, better, and faster cultivars through the pipeline. For more information, visit the KBC website at www.kiwifruitbreeding.com.

GROWERS WANTED FOR MPI KIWIFRUIT ORCHARD MONITORING PANEL

The Ministry for Primary Industries (MPI) Kiwifruit Orchard Monitoring Programme was re-established in 2023 for the Bay of Plenty region, funded by MPI, with in-kind support from NZKGI and Zespri.

Production and financial data are collected by Fruition Horticulture (BOP) Limited from kiwifruit orchard businesses who volunteer to join the survey panel. Anonymised data is used to prepare the Bay of Plenty regional kiwifruit orchard model.

Green-only, Gold-only, and mixed-variety orchards over two canopy hectares in the Bay of Plenty are being sought to expand the survey panel in 2024. Participants will receive an individualised confidential benchmarking report.

The benefits of the programme include:

- Having a regional Kiwifruit Orchard Model for the Bay of Plenty that tracks changes over time.
- Time series data for the production and financial performance of green and gold kiwifruit orchards.
- Better understanding of cost categories, such as labour.
- Access to data for orchard budgets and decision-making.
- Enable orchard businesses to assess and benchmark performance.
- Better communicate the financial status and performance of the industry with policymakers.



If you are interested in joining the survey panel, please contact Ruth Underwood ruthunderwood@fruition.net.nz or 027 430 2408

GLOBAL EXTENSION TEAM UPDATES

THE MONTH AHEAD: AUGUST

SOIL AND
FROST 'TO-DO'
LIST

WINTER
CHILL

HYDROGEN
CYANAMIDE



SOIL AND FROST 'TO-DO' LIST

Optimise this season's fertiliser inputs by sense-checking your fertiliser recommendations against a simple nitrogen balance. See the [Canopy Nutrition for vines and fruit page](#) for details.

Now's also a good time to think more broadly about your soil health, frost and irrigation system set ups for the coming season.

- Check your GAP required soil management plan (principle 3.1) for actions you'd planned but hadn't got to yet, and update it to include any new ideas ahead of inspection time.
- If soil moisture sensor install is on your 'to do' list, get that sorted soon so they're 'settled in' and giving accurate readings by summer.
- Get your frost thermometers calibrated, and do a bucket test or other system checks on your frost protection system, so you can identify and resolve any problems well before the frost season starts.

See more:

- [Fruit production > Growing fruit > Soil, nutrients & water > Nutrition for vines and fruit](#)
- [Fruit production > Growing fruit > Soil, nutrients & water > Manage soil](#)
- [Fruit production > Growing fruit > Soil, nutrients & water > Manage water and irrigation](#)



WINTER CHILL

For most growing districts, winter chill is tracking well ahead of the last few seasons across the country. A welcome relief given the more recent trends towards warmer winters.

Remember, those temperatures across May and June will affect budbreak date, whereas the chill accumulated across June, July, and August impacts the number of flowers.

In some regions, winter chill is accumulating at its highest rate when compared to the previous six seasons. These include weather stations from Waihi, Waikato, Katikati, Paengaroa, and Hawke's Bay as of 25 July.

The Zespri Weather & Disease Portal has a section dedicated to winter chill accumulation. You can track chill using data specific to a weather station of your choice. You can also track via multiple models: Chill Hours (Sum), Hours below base temp and Richardson Chill Units. Just make sure you use the same model when comparing data across different seasons.

Winter chill can be used to help with several winter decisions including the timing of bud break enhancement sprays, and calculating the target number of buds per m² to tie down.

See more:

- [Fruit production > Tools > Weather & Disease Portal](#)
- [Fruit Production > Tools > Managing Budbreak > Understanding, predicting and monitoring budbreak](#)



HYDROGEN CYANAMIDE

Give yourself enough space for hydrogen cyanamide.

Along with neighbour notification and using the correct PPE, applying the right rate of hydrogen cyanamide in the right conditions making sure your buffer zones are correct helps ensure a safe application for people, waterbodies and sensitive plants nearby.

The distance differs depending on location (Northland has different distances) and presence of shelter. Check out the hydrogen cyanamide buffer zones on Canopy to work out what you need. For a more comprehensive but easy to follow overview, see [Canopy > News > Safe Spray workshop recap](#).



GET 2024/25 WORKSTREAMS

GET have a busy and varied programme of work planned for the 2024/25 season. Here are the areas we're focusing on:

- **Hayward profitability:** Aiming to identify and resolve constraints to Hayward production that will allow Zespri Green demand to be consistently and sustainably met. This will be largely research and market-focused this year.
- **Fruit quality:** A key focus on harvesting practices that enable growers to meet market quality requirements, working with growers and harvest contractors.
- **Running with RubyRed:** Support Zespri's goal to successfully commercialise RubyRed, specifically achieving fruit size for the category on 1st and 2nd cropping blocks.
- **Maximise supply of optimal maturity Gold3 fruit:** Looking at on-orchard management

practices to increase supply of optimal maturity Gold3 at mainpack to post-harvest, with predominantly a research focus this year.

- **GAP:** Supporting growers and industry to meet Zespri GAP requirements, Freshwater Farm Plan regulations and the industry's sustainability goals, focusing on areas identified as pain points at the June Shed Talks.
- **New varieties:** Completing stage 3 trials to allow informed commercialisation decisions to be made.



If any of these are of particular interest to you, please don't hesitate to get in touch with the Global Extension Team via extension@zespri.com.



KIWI TIPS: HAVE YOU SIGNED UP?

Kiwi Tips, the monthly e-newsletter from the Global Extension Team that covers off important and timely seasonal tips and reminders for growers like you, has had a change.

Now, there are multiple ways to get your *Kiwi Tips* fix. As well as the written word, *Kiwi Tips* is available monthly as a podcast and a video!

Check it out: [Canopy > News > Publications > Kiwi Tips](#)

SCAN ME

to register for *Kiwi Tips* delivered straight to your email inbox:



NZKGI AGM: A NOTE FROM NZKGI CHAIRMAN, MARK MAYSTON



“Growers should have received our AGM pack in the post and, to save costs, our annual report is available online as we did last year, www.nzkgi.org.nz. I encourage you to read our report which outlines NZKGI's key activities, events and financial statements over the reporting period.

In our annual report, I recognise the successes of our advocacy for growers over the last year, including our bid to retain Hi-Cane. Such wins are critical for the profitability of your business. Unfortunately, this reassessment has cost NZKGI most of our retained earnings. NZKGI no longer has the financial viability to fight such cases that are beyond our operating expenses in the future. As the industry grows stronger, it is equally important that growers are advocated for by an equally strong NZKGI.

Consequently, we are asking for an increase in our levy of two tenths of one cent per tray to a total of \$0.013 cent. Again, this is an investment with great returns. A levy of 1.3 cent per tray creates a stronger and more independent NZKGI with better oversight and reporting for improved industry governance. The increase of around \$200,000 to NZKGI's income would create:

- Greater independence in undertaking critical projects for growers. Historically Zespri has contributed to some projects such as the Hi-Cane hearing.
- Enhanced performance reporting of Zespri. Plans are currently underway which will be presented at NZKGI's upcoming roadshows.
- An enhanced ability to undertake projects which support the single desk. NZKGI requires additional funding to undertake further projects independently from Zespri, such as our BERL report on the single desk.
- The capacity to respond quickly to one-off events such as performance analysis of the Europe mice infestation or in building a better picture of global threats such as SunGold in China.
- More time to invest into central and local government to build deeper relationships. It is important that NZKGI has the capacity to be a strong voice in light of a growing Zespri presence.
- An improved ability to fund projects which contribute to policy settings. This includes, for example, financing for advice from experts on topics such as water, shelter, bird scarers etc.
- Furthered advocacy of the RSE scheme for kiwifruit growers through participation at the Pacific Labour Mobility Annual Meeting.
- Allocated funding specifically to grower education so that growers have stronger industry knowledge and can make more informed decisions.

NZKGI is not a cost for growers. As your representative, you need a strong voice and, as I've noted above with Hi-Cane, your investment into your advocacy body has dividends that far outweigh the levy paid. I strongly encourage you to vote for this resolution and to speak with any of our Forum members if you have any questions or concerns."



LEVERAGING ZESPRI'S GLOBAL SUPPLY NETWORK TO ENHANCE BIOSECURITY PREPAREDNESS



KVH's role in leading biosecurity readiness and response for the kiwifruit industry is about preparing for threats that are not yet here. This presents a challenge in that we spend substantial amounts of time working on organisms we may not have seen or experienced ourselves.

Published information can be extremely useful, but has its limitations, lacking the subtleties and nuances of on-the-ground experience and typically has a significant lag to the time of publication, which in a fast-moving invasion may be significant.

Success in biosecurity readiness is therefore dependent on strong networks to share knowledge and collaborate on the development of potential tools and solutions. These networks are diverse and include government organisations, the science community, biosecurity practitioners and industry connections.

While each of these connections provide valuable insights into our biosecurity preparedness, it is Zespri's Global Supply (ZGS) network that is potentially of greatest benefit as their experiences are the most directly relevant to New Zealand's growing systems.

For biosecurity readiness, having an international network of kiwifruit growers is invaluable to gain insight into the potential threats to New Zealand kiwifruit growers; learn from their first-hand accounts; and to collaborate for knowledge gains.

In some instances, threats may be well known and well-studied with a wide range of published material which can be used for this process. Other times, an organism may arise from relative obscurity to become a prolific invader in a short space of time, as was the case with the Brown Marmorated Stink Bug (BMSB) in the USA.

HOW ZGS ENHANCES OUR READINESS FOR BMSB

At KVH in 2013, the National Psa-V Pest Management Plan had only just been implemented and Psa was very much at the forefront of our activities, but already the industry was thinking proactively about the next biosecurity threat and gave us the mandate to lead readiness and response activities for the future.

About this time, the Ministry for Primary Industries (MPI) alerted us to a potential pest, already causing damage in the USA, the now infamous BMSB.

BMSB was well established in the USA by this point and was proving to be a prolific invader causing significant impacts to the public as a nuisance pest, and also to horticulture, with peach, apple and pear growers experiencing significant losses (sometimes total crop losses).

However, BMSB wasn't present in regions of the USA where kiwifruit was grown, so the potential impacts to kiwifruit were unknown. Perhaps our fruit would be too hard, we hoped optimistically. It was clear that the rate of invasion across the USA meant that we needed to understand this threat and start preparing on behalf of New Zealand kiwifruit growers, and in partnership with Biosecurity New Zealand as well as other horticultural sectors (under what would later become New Zealand's BMSB Council).

International networks became key, and we reached out to leading BMSB experts in the USA and brought them here to communicate the potential threat. As the pest expanded its range, and more research was undertaken, the published number of plants that BMSB could impact grew from about 100 to over 300 species in a short time frame - but kiwifruit remained one crop where the impacts continued to be considered unknown.

KVH and Zespri Innovation funded lab-based studies in the USA which demonstrated potential feeding damage

in an artificial environment. But it was really the network of Zespri's international growers that provided the greatest insight.

Utilising the ZGS network of growers in Japan, Korea, and a trial grower in the USA, we were able to gain an understanding that BMSB does impact kiwifruit and gain knowledge about management practices. Although at this stage the difference in production systems, available agrichemicals, and biological influences on BMSB and other organisms in the surrounding ecosystem made it difficult to apply the learnings to New Zealand growers.

The real game changer in our knowledge occurred once BMSB invaded Europe and populations built to a level where impacts were observed on ZGS orchards in Italy and then France. This provided New Zealand with a much closer production system to observe and learn from. While the invasion of BMSB in Europe has presented growers there with a significant challenge, it has improved our knowledge of the potential impacts and management strategies that can be utilised in the event of an incursion. We know what has been trialed already, what has worked, what hasn't worked, what is in progress, what remains unknown and have a network of contacts who can provide advice, collaborate on projects and also increase the exposure of New Zealand based staff who have seen and experienced BMSB and can bring this knowledge back home.

For on the ground preparedness, there is no substitute.

BMSB is one example, but similar lessons apply for Kiwifruit Vine Decline Syndrome (KVDS), White Peach Scale, exotic fruit flies, and pathogens like Phytophthora and Phytophythium species. The strong relationship between KVH and ZGS will continue to be successful and result in great benefits for New Zealand growers.



KVH has been leading the kiwifruit industry's biosecurity preparedness activities for over a decade, building networks worldwide.



Using intel from networks like ZGS ensures we have the best information and experience at hand if we need to respond to another serious incursion in New Zealand.



Visits between KVH staff, international growers, and biosecurity experts, are important for gathering first-hand experience that can be applied on our orchards.

Q&A FROM THE FIELD

KEY CONTACTS

Grower & Industry Relations Manager
Malkit Singh: 027 665 0121

Sylvia Warren – Gisborne, Ōpōtiki,
Whakatāne, Pukehina, Pongakawa:
022 101 8550

Brad Ririnui – Tauranga, Paengaroa,
Hawke's Bay: 021 757 843

Grower Relations Managers
Sue Groenewald – GRM Red,
Athenree, Waihi, Coromandel:
027 493 1987

Jemma Pryor – Te Puke:
027 283 6192

Robin Barker-Gilbert – Katikati,
Lower North Island, Nelson:
027 779 5910

Richard Jones – Waikato, Auckland,
Northland, Ōropi, Omanawa, Lower
Kaimai: 027 255 6497

Teresa Whitehead - Organics:
027 257 7135

I'm having trouble accessing Canopy. Who do I contact?

We are constantly working to address feedback about Canopy. If you are having problems logging on or finding material, please contact the Zespri Grower Services team on 0800 155 355 or contact.canopy@zespri.com to ensure we can address your concerns and improve your experience. There's also some handy information on page 12.

Why does Zespri need my bank account for the 2024 January Loyalty payment?

As part of our Industry Alignment programme, Zespri has announced two initiatives designed to help strengthen grower shareholding of Zespri. This includes providing growers with an opportunity from 2025 to receive their June loyalty payment (relating to our 2024 harvest season) as shares and reinvesting their dividend payments as shares. All loyalty payments from 2025 will be made directly from Zespri to Growers' nominated bank account, rather than being paid by your post-harvest entity as most have done in the past.

We have developed an easy-to-complete online form where growers can enter their bank account details, GST number, and proof of account via the Zespri Industry Portal.

You can find the 'My bank account details' user guide on Canopy under the Home > Supply & operations > Your orchard business > Grower contracts and then by clicking on the 'See how to update your bank account details here' button.

I would like to know more about Zespri Global Supply (ZGS), who do I contact?

ZGS is the industry's counter-seasonal supply programme. This was established more than 20 years ago when growers recognised that to build the Zespri brand and maintain shelf space, we needed to be a kiwifruit provider 12 months of the year.

For further discussion, please reach out to your Grower Relations Manager or visit the Zespri Global Supply page on Canopy. You can find additional information there, including Grower feedback and FAQs.

Please also use the form located at the bottom of the ZGS Canopy page to share your feedback or submit a question: [Canopy > Zespri Global Supply](#).

Alternatively, if growers want to get a few of their fellow growers together for a discussion with Zespri, please contact your GRM and we can come to you as a group to discuss.

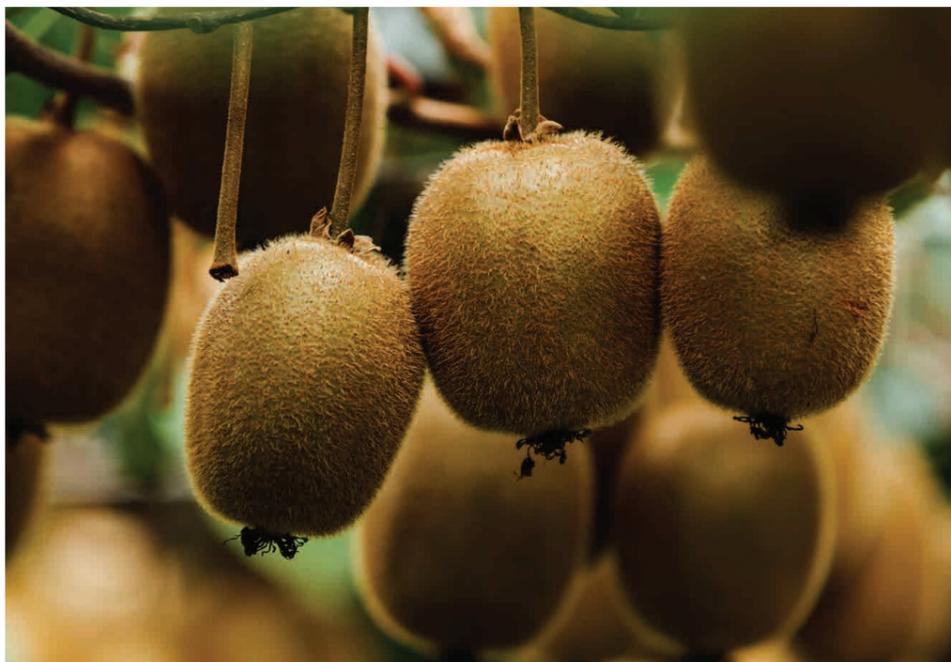
My shares are held in the name of a company (i.e., Ltd. or Limited) or other incorporated entity. How do we vote at the Zespri Annual Meeting?

You are classed as a 'corporate shareholder'. Corporate shareholders who wish to vote at the Annual Meeting must appoint a proxy at least 48 hours prior to the Zespri Annual Meeting. The 2024 Annual Meeting will be held at 1pm on Wednesday 21 August at Mercury Baypark Arena, 81 Truman Lane, Mount Maunganui.

Alternatively, you can vote via postal voting or online voting ahead of time. Computershare Investor Services Limited is authorised to receive and count postal votes at the meeting, independent of Zespri. For more information, contact the Zespri Share Registry Officers, Hayley McCulloch or Rosie Sim at shares@zespri.com or via the Grower Services team on 0800 155 355.

When does the PVR for SunGold expire?

SunGold PVR expiry dates vary from country to country depending on when it was lodged and there are also different PVR periods for different regions. The New Zealand PVR expires in September 2039. The Europe SunGold PVR expires in 2042. The Kiwifruit Breeding Centre is working hard in the breeding programme to make alternative varieties to allow growers to have a PVR portfolio beyond the current SunGold PVR expiry.



UPCOMING EVENTS

7
AUG

HORIZON DIGITAL SHOWCASE

Time: 1.30pm to 4.00pm

Location: Zespri Head office, 400 Maunganui Road

Over the past two years, we have made substantial investments in our digital platforms through Project Horizon, to replace systems that were over 20 years old and to prepare us for the future, enabling more data-driven decisions to maximise returns.

Our Horizon Digital Showcase will present a number of the solutions implemented, including improvements in managing offshore customer quality claims, quality control, Integrated business planning, and the value-add reporting capability enabled by implementing these new centralised platforms.

Register here:

<https://events.zespri.com/horizon-digital-showcase-2024/registration/Site/Register>

22 AUG -
4 SEP

GROWER ROADSHOWS

Please join our CEO Jason Te Brake, members of our Executive Team, and Zespri Directors for updates on the 2024 market performance, latest financial forecast, and Northern Hemisphere expansion proposal.

These meetings will be held in person, with an option to join online for the Te Puke Roadshow.

DATE	TIME	LOCATION
Thursday 22 August	11am - 1pm	Nelson Top 10 Holiday Park, 10 Fearon Street, Motueka
Monday 26 August	9am - 11am	Waikato Mystery Creek Events Centre, Gate 2, 125 Mystery Creek Rd
	2pm - 4pm	Auckland PIA Event Centre, 55 Ward Street, Pukekohe
Tuesday 27 August	9.30am - 11.30pm	Kerikeri The Turner Centre, 43 Cobham Drive
	2pm - 4pm	Whangārei Semenoff Stadium, 51 Okara Drive
Wednesday 28 August	9am - 11am	Katikati Fairview Golf Club, 34 Sharp Road, Aongatete
	6pm - 8pm	Tauranga Tauranga Racecourse Event Centre, 1383 Cameron Road
Thursday 29 August	9am - 11am	Te Puke (online option available) The Orchard Church, 20 MacLoughlin Drive
Friday 30 August	2pm - 4pm	Te Puna Te Puna Memorial Hall, 3 Te Puna Road
Monday 2 September	10am - 12pm	Ōpōtiki Ōpōtiki Golf Club, 14 Fromow Road
	2.30pm - 4.30pm	Pongakawa Pongakawa Hall, 952 Old Coach Road
Tuesday 3 September	9.30am - 11.30am	Awakeri Awakeri Events Centre, State Highway 30, Awakeri, Whakātane
	4pm - 6pm	Gisborne Bushmere Arms Hotel, 673 Matawai Road, Waerengaahika
Wednesday 4 September	1pm - 3pm	Hawke's Bay No. 5 Café & Larder, 248 State Highway 51, Mangateretere

Register for your preferred location here:

<https://events.zespri.com/roadshows-augustseptember-2024/registration>

If you have any questions, please contact Erin Herbert on erin.herbert@zespri.com.

7-13
SEP

ZESPRI AIMS GAMES VOLUNTEERS NEEDED!

We're excited to welcome athletes, supporters, and volunteers back to Tauranga Moana next month with the tournament taking place from September 7 to 13.

Supporting AIMS Games is about making a positive contribution to our communities, and the tournament aligns so well with our values. We love that it teaches healthy habits to the next generation and helps build great personal connections with team-mates, competitors, and volunteers.

We need volunteers to help run our activations and connect with athletes and the community. To be part of the volunteer team, reach out to the Zespri Tours & Events team at tours.events@zespri.com.

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FOR FURTHER INFORMATION OR FEEDBACK PLEASE CONTACT: THE ZESPRI GROWER SUPPORT CENTRE (0800 155 355) P.O. BOX 4043, MOUNT MAUNGANUI. TEL: 07-572 7600, FAX 07-572 7646 www.zespri.com canopy@zespri.com EMAIL: contact.canopy@zespri.com

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