



Pacific Islands
Trade & Invest



Pacific Islands

EXPORTING COCONUTS TO NEW ZEALAND



market brief

ABOUT THIS PAPER

This market brief has been prepared by the Pacific Islands Trade & Invest (PT&I) office in Auckland as part of a partnership project with the Food & Agriculture Organization of the United Nations (FAO).

This market report aims to give Pacific Island exporters (or potential exporters) an overview of the New Zealand market; key market trends; market requirements; and market opportunities. This report examines the market for coconuts in New Zealand.

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Photo credit: PT&I



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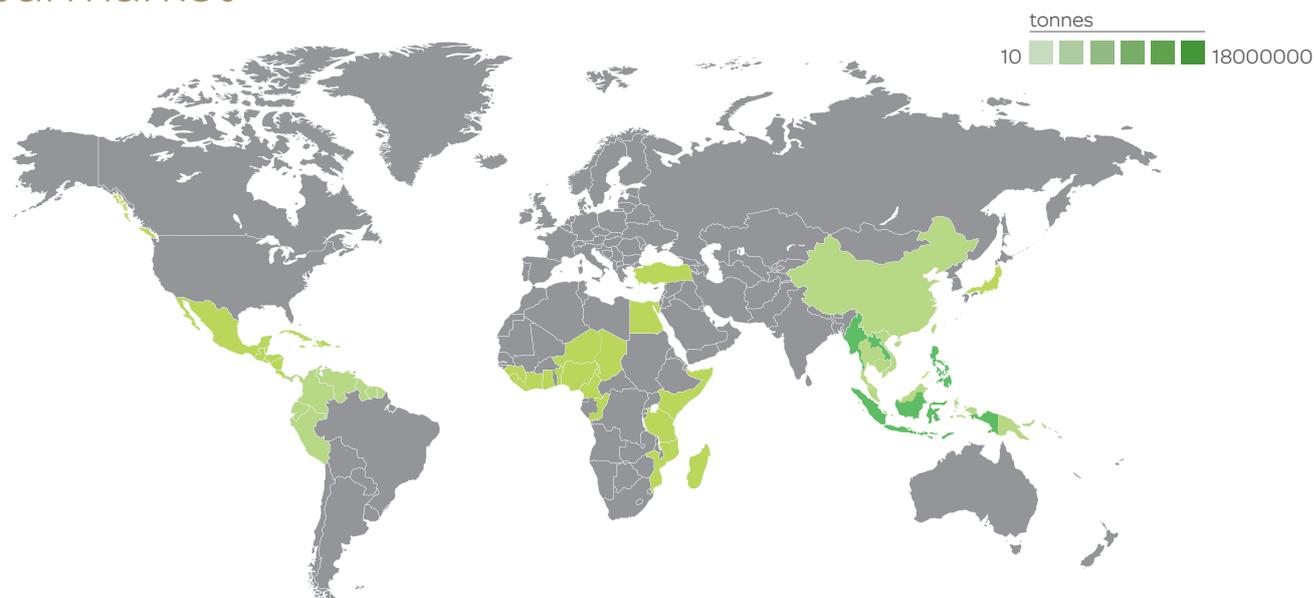
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Map 1: Global production of fresh Coconuts (tonnes)

Source: FAOSTAT

GLOBAL PRODUCTION

According to FAOSTAT, global production of fresh coconuts increased gradually from approximately 51.9 million tonnes in 2001 to about 59.4 million tonnes in 2010. World production has been relatively stable over the period 2006-2010, increasing by 3%.

Table 1 shows the five largest fresh coconut producing countries in the world. Global production continues to be concentrated in Indonesia, Philippines and India. These three countries make up about 75% of the global production. Papua New Guinea was the 7th largest coconut producer in the world, producing approximately 1.2 million tonnes of coconuts.

The other main global markets for coconuts are coconut oil and desiccated coconut. Coconut oil is one of the main global markets for coconuts. World production of coconut oil has grown by approximately 23% over the period 2006-2010. Production reached 3.98 million tonnes in 2010 - the highest level over the past ten years.

It is dominated by the Philippines and Indonesia whose combined production accounts for 70% of the global production.

Desiccated coconut is an established product and a larger number of countries can produce it than coconut oil. Global production of desiccated coconuts is estimated to average between 180- 290,000 tonnes annually¹. The Philippines, Sri Lanka and Indonesia once again dominate the global production of desiccated coconuts.

Table 1: Global production of fresh coconuts, 2010.

Top producers	Tonnes
WORLD	59,421,273
Indonesia	18,000,000
Philippines	15,540,000
India	10,840,000
Brazil	2,837,530
Sri Lanka	1,761,680

Source: FAOSTAT

¹ United Nations Conference on Trade and Development (UNCTAD). (2012, April 27). AAACP Products: Coconut.

² Ibid.

³ Ibid

⁴ Ibid

GLOBAL TRADE

Table 2 shows the top 5 global importers and exporters of fresh coconuts. Global imports of fresh coconuts grew by 10% from 359,394 tonnes in 2006 to 394,899 tonnes in 2010. Similarly the global exportation of fresh coconut increased by 13% during this period as from 406,250 tonnes in 2006 to 457,210 tonnes in 2010.

In 2010, global importation of fresh coconuts was valued at US\$158.2 million while the value of global fresh coconut exports was about US\$150.8 million.

China was the largest consumer of fresh coconuts. In 2010, China imported about 141,206 tonnes of fresh coconuts which alone accounted for 36% of global imports. Indonesia and Vietnam were the largest exporters of fresh coconuts.

UNCTAD (2012) attributed the growth in the international trade of fresh coconut to a greater demand and higher prices received. As a result, some of the large coconut oil producing countries such as Vietnam significantly reduced their production. Some countries (Thailand, Sri Lanka) are now importing fresh coconuts to satisfy their demand while production has become uneconomical for others (Sri Lanka, Thailand, Malaysia, Mexico)².

The international trade of coconut oil has increased over the 2006–2010 period. After falling in the first years of this period, the international coconut imports increased significantly from 2,050,493 tonnes in 2009 to 2,651,709 tonnes in 2010. This represented a 29% growth. The largest importers of coconut oil in 2010 were the United States of America (576,855 tonnes), Netherlands (447,917 tonnes) and Germany (368,197 tonnes).

Global exports of coconut oil amounted to 2,405,178 tonnes in 2010. More than half of global exports comprised of supply from the Philippines which exported approximately 1,345,703 tonnes. The other main global exporters of coconut oil were Indonesia (567,497 tonnes), Netherlands (192,482 tonnes), Malaysia (131,501 tonnes) and Papua New Guinea (45,397 tonnes).

Trade statistics show a significant decrease in the exports of desiccated coconuts. Over the five year period international exports fell by 14% - from 325,286 tonnes in 2006 to 281,210 in 2010. UNCTAD (2012) highlighted the diminishing production of desiccated coconuts in Vietnam, Thailand, Brazil and Sri Lanka while new capacity is being developed in Papua New Guinea³.

The Philippines (109,168 tonnes), Indonesia (47,097 tonnes) and Sri Lanka (28,874 tonnes) were the largest exporters of desiccated coconut. The main consumers of desiccated coconut in 2010 were the U.S. (37,367 tonnes), Singapore (23,029 tonnes) and the Netherlands (19,117 tonnes).

Table 2: Global fresh coconut trade, 2010

Top global importers	Tonnes
WORLD	394,899
China	141,206
Malaysia	58,714
United States of America	34,322
Singapore	20,371
United Arab Emirates	18,700

Top global exporters	Tonnes
WORLD	457,210
Indonesia	130,017
Vietnam	124,530
Thailand	33,250
India	31,559
Sri Lanka	29,258

Source: FAOSTAT

GLOBAL OUTLOOK

The broad based application of coconut across product sectors and the advancements in commercial technologies has accelerated the market growth for coconut products worldwide. The outlook for the coconut industry is bright.

The demand for coconuts has grown in popularity primarily due to its nutritional and health benefits. The coconut is considered to be a healthy food. There is a shift in the market toward value added forms of the product as consumers seek a product on-the-go that can fit into their increasingly busy lifestyles. There is a demand for coconut water, spray coconut oil, coconut milk, coconut vinegar and virgin coconut oil (VCO).

There is a growing market for coir production to be used mainly in the processing of geo textiles. These are used in mattresses and car seat upholstery. China and India are the largest consumers of coir fibre and the rubberized coir made from it. Rubberized coir is a value able product and there are expectations that this will attract serious investment in the future⁴.

key global trends

A recent Deloitte (2010) report highlighted some key global trends and their effect on businesses. Table 3 summarizes these key points with additional references to New Zealand and the Pacific Islands exporters.

Table 3: A summary of key global market trends

	NEW CONSUMER REALITIES	FOOD SAFETY CONCERNS
TREND	<p>Consumers continue to be wary of economic recovery. Reassessing their spending habits and priorities.</p> <ul style="list-style-type: none"> • Shift in spending to private label goods, searching for discounts and better value • Value aligned with personal values such as quality, sustainability, health and etc. 	<p>Increasing demand for transparency in the origin, nutrition and quality of the product.</p> <p>Industries have responded by adopting more rigorous, globally accepted standards.</p>
NEW ZEALAND MARKET TRENDS	<p>New Zealand consumers more aware of extending their credit line. Saving schemes such as Kiwisaver are enticing consumers to save⁵.</p> <p>Price continues to be main determinant of purchase.</p>	<p>Coconut is considered a healthy food. There is shift in the market toward high-valued food uses for coconuts such as tender coconut water⁶.</p> <p>Health and safety concerns have seen buyers and consumers place greater emphasis in knowing about the ingredients and the production process.</p>
PACIFIC ISLAND COCONUT EXPORTERS	<p>Research the market and develop your marketing plan and strategy.</p> <p>Devote a lot of attention to your price structure and strategy.</p> <p>Determine how you will market 'value' to New Zealand consumers. E.g. Health benefits? Origin story?</p>	<p>Improve product quality, packaging and labelling.</p> <p>Focus on developing a system or structure that will facilitate traceability in your production.</p> <p>Certification and quality assurance programmes will be important. E.g. HACCP, Organic/Fair Trade certification.</p>

⁵New Zealand Retailers Association. (2012). *The Retail Market in New Zealand: An Analysis 2011/12*.

⁶Ibid.

MANUFACTURERS SEEK SECURITY IN SUPPLY CHAIN

Growth in global population, expansion of middle class in key developing countries, depletion of food stocks, volatility in food prices.

NZ buyers have vertically integrated in the Pacific Islands to strengthen the links in their operations.

E.g. Turners & Growers has established operations in Fiji and recently it exported pineapples to its New Zealand branch.

NZ buyers are interested in building long term relationships. Communication and coordination are important particularly during the trial shipments.

Schedule market visits to meet with your buyer face to face to discuss opportunities for improvement.

SOCIAL MEDIA

Online shopping and social media have reshaped consumer behaviour - consumers have taken charge of their shopping experience.

With greater access to information and online shopping, consumers have a wide range options to consider before purchasing.

Consumers have taken charge of their shopping experience by making price comparisons, peer reviews and credit/debit card on smart phones.

E.g. Countdown supermarket launched their shopping iPhone app. in 2012.

Nearly half of NZ adults made at least one online purchase in the last year and, on average, purchasing through this channel three times.

Who are your consumers? Research the market to identify what factors triggers consumers' purchases.

Develop strategies that effectively market your coconut products by emphasising its benefits - What are the health benefits of coconuts? Is it certified organic? Certified Fair Trade?

PRICE STRATEGIES TO IMPROVE PROFITABILITY

High cost of raw materials and input costs such as oil which are squeezing margins across industries.

Consumers have learnt to wait for sales, expect every-day-low-prices, chase bargains and even expect discounts on luxury items.

A growing emphasis on offering value beyond price only therefore it is 'more about value and less about cheap.'

Retailers are seriously considering the brands they stock. They must also establish a point of difference in the market.

Develop a point of difference.

Consideration should also be given how you will promote in the stores as buyers/wholesalers will be interested to know what you will do to support product launch and in store promotion. Factors to consider include product range, price, terms of trade, quantities etc.

Source: Deloitte (2009), NZ Retailers Association (2010)

market overview

Coconuts are one of the Pacific Islands' major agriculture exports to the New Zealand. This research has identified growth opportunities in the market for coconut products from the Pacific Islands. The present opportunity is based on the abundant supply of coconuts in the region; the broad-based application of coconuts; and the awareness of its nutritional and health benefits have contributed to the growing demand for natural coconut products.

There is a demand for value-added coconuts products particularly for coconut water, coconut sugar, desiccated coconuts and virgin coconut oil (VCO). Additionally opportunities were identified in the niche market for certified organic or Fair Trade coconut products.

MARKET STRUCTURE

The structure of the New Zealand market for fresh produce can be segmented into three-tiers based on commercial size⁷:

• LARGE COMMERCIAL IMPORTERS

Examples of large commercial importers of fresh produce include Turners & Growers Ltd, MG Marketing, Freshmax and Fresh Direct. These companies place great emphasis on consistency of supply and quality given that they handle large orders for various customers including the supermarket chains and independent retailers. Large commercial buyers have the established infrastructure and systems in place to supply customers on a national basis.

For the Pacific Islands, the large commercial importers only import Pacific Island produce in high demand such as taro, coconuts, ginger, papaya, eggplants and watermelons. Specialty Pacific Island lines such as okra and sugar cane are often supplied to the large importers as well as small retail buyers and restaurants.

• MEDIUM COMMERCIAL IMPORTERS

There are several small-to-medium sized companies such as Tropical Fresh Ltd that specialise in importing and distributing Pacific Islands produce. Limited by their size, these companies deal only in limited quantities and carry out any necessary sorting and repacking economically.

Medium commercial importers may also align with supermarket chains to supply some specialty lines or have their own retail outlets. Some also sell through the 'flea market' channels on the weekends.

• SMALL IMPORTERS

This tier consists of small family and church networks often referred to as the 'informal channel'. Generally products are imported directly from their home countries (such as the Pacific Islands) through to family connections and supplied to their own local buyers.

Fresh coconuts are imported by all three tiers. Commercial buyers place great emphasis on the volume an exporter can supply the market and the frequency of its shipments. Typically for coconuts, commercial buyers are interested in a full container load supply a week. Small importers generally import a mixed container of coconuts and taro for sale at the flea markets.

PRODUCT TYPES

There is a wide range of coconuts products available on the market. The following subsections present a brief overview of the market for a few coconut product sectors such as coconut cream, desiccated coconuts, coconut oil and certified coconut products. Additionally there is a general overview of the market for fresh coconuts.

⁷Grandison, G. (2003). *Exporting Fruits and Vegetables to New Zealand: A Guide for Pacific Island Producers*.

COCONUT CREAM

The Pacific Island populations in New Zealand are the primary consumers of coconut cream. Coconut cream is also consumed by other ethnic groups such as the Asian population. However, their consumption is said to be not as regular as the Pacific Islanders⁸.

The market for coconut cream is mature and highly price driven. There are several brands on the market now including, Kara's, Ala Pipi, Pacific Crown, Fia Fia coconut. For Pacific Island exporters to be competitive, they need to be able to develop a point of difference and most importantly price competitively.

Today the retail market is dominated by brands from Thailand and Indonesia which are relatively cheaper than the products from the Pacific Islands. Notably there are coconut cream products on the market from Asia which target Pacific Island consumers directly by employing their local language such as Ala's Delicious Pe'e Pe'e Premium Coconut Cream. Fourteen brands of coconut creams were observed in a supermarket in Mangere (Auckland) with only one brand from Fiji. Prices ranged from NZ\$1.59 (Bumas brand) to NZ\$2.99 for the Kara's brand.

The best seller on the market is the Kara's brand from Indonesia. Buyers attribute its success amongst Pacific Island consumers to consistency in supply and quality at a competitive price point. Kara's coconut cream is said to be thicker and creamier than other brands on the market which is preferred by Pacific Island consumers. Consumers tend to prefer coconut cream in tetra paks over canned packaging⁹.



Photo credit: PT&I

DESSICATED COCONUT

There is a good demand for desiccated coconut in New Zealand. It is an essential ingredient for the baking and confectionary industry therefore it is widely used by food manufacturers, the food service and household consumers. The broad consumer base means that desiccated coconuts are packaged in various sizes including a 25 lb. bag. Desiccated coconut are sold in four grades: (1) Fine (2) Medium (3) Thread and (4) Chip¹⁰.

The New Zealand market for desiccated coconut has fluctuated between 1.4 thousand and 1.9 thousand tonnes over the last five years. The Philippines and Indonesia are the major suppliers of desiccated coconuts to New Zealand, possessing 50% and 42% of the market respectively in 2011. According to data from Statistics NZ, Fiji and Samoa recorded one small shipment in the last five years.

It is a price driven market. New Zealand importers have tended to import the product in bulk and repackage to their customers specifications. New Zealand buyers continue to express interest in desiccated coconuts, if the price is right. There continues to be an opportunity for Pacific Island exporters if their supply and quality is consistent. Importantly they need to be competitively priced against the products from Asia.

⁸Yip, S. (2012, April 17). J. Fuavao, Interviewer.

⁹Hammond, R. (2012, May 7). J. Fuavao, Interviewer.

¹⁰Ibid.

market overview

COCONUT OIL

There is potential for growth in the coconut oil market, provided that it is of high quality and price competitive. Demand in this market is increasing as consumers become educated about the product – how it is used and its health benefits¹¹. This has been driven by popular cooking shows.

Importers are interested in coconut oil from the Pacific Islands especially if they are certified organic or Fair Trade products. The Pacific Islands face competition in this market from Asian producers such as the Philippines. In the retail sector there are several brands of coconut oil. For it to be viable to source from the Pacific Islands, some importers have opted to import the coconut oil in drums by seafreight then process and repack them under their own brand for the retail sector.

COCONUT SUGAR

There is a high demand for certified organic coconut sugar in the market. Coconut sugar is a relatively new product that is commercially promoted as an alternative to cane sugar and a safe consumption for people with diabetes. Similar to many of the coconut products in the New Zealand market, the markets are dominated by imports from the Asian countries.

DRINKING COCONUTS

The market for drinking coconuts, although very seasonal, is showing some growth. There is a greater demand for fresh drinking coconuts in the summer. Fresh drinking coconuts are considered to be a relatively novel product in the mainstream market. In the past the Pacific Islands were the main supplier of drinking coconuts to New Zealand. Today the landscape has changed. Philippines and Thailand are now the largest suppliers of drinking coconuts, successfully tapping into the mainstream market.

The clear liquid inside these coconuts is a popular product, known as coconut water. Available in cans, tetra paks and in sachet form, coconut water is in high demand. It is marketed as an isotonic for athletes and active people. The market is currently dominated by product from Thailand and Indonesia. There is a high demand for coconut water and importers expressed strong interest in looking at coconut water from the Pacific Islands.

DRY COCONUTS

Dry coconuts are imported from the Pacific Islands all year around. Importers believe that the demand for dry coconuts in New Zealand is generally static, although there are some seasonal fluctuations. Pacific Island people were identified as the main consumers in this market. Size and the thickness of the flesh are the main characteristics that importers look for in a dry coconut. Dry coconuts from Tonga are the most popular on the market. It is said to be relatively better on size and have a thicker flesh¹². The large coconuts are usually distributed in Auckland while the small sizes are distributed in Wellington and Christchurch¹³.



¹¹Drew, J. (2012, May 29). J. Fuavao, Interviewer.

¹²Ibid.

¹³Ibid.

CERTIFIED COCONUT PRODUCTS

There is a small market for certified organic or Fair Trade coconut products in New Zealand. However, it is a growing market driven by people's growing concern about chemicals in foods and whether the benefits tickle down to the growers. New Zealand consumers are increasingly making values based purchasing decisions.

Research shows there is an increased support by mainstream supermarkets for organic and fair trade products. In 2009, the New Zealand market for organic food and beverages was valued at \$315 million, an increase from \$210 million in 2007. Organic buyers have indicated their preference for sourcing local products followed by the Pacific Islands as the next preferred supplier¹⁴.

Last year retail sales for Fair Trade certified products increased by 24% on the previous year to an estimated value of NZ\$45.5 million. Fair Trade data shows that more than three-quarters of New Zealand consumers agree that third-party certification is the best way to verify a product's claims¹⁵,

Organic and Fair Trade certification builds that connection between the supplier and consumer. There is value in it for Pacific Island exporters who are able to tap into these systems. The combination of a strong origin story and a



recognized certification standard can be a point of difference in the market¹⁶. These products target a sophisticated segment of the market which actively researches information about a product before purchasing it. Therefore it is important for the marketing to be informative.

¹⁴Wood, M. (2012, April 27). J. Fuavao, Interviewer.

¹⁵Luff, B., & Trogolo, M. (2012, May 2). J. Fuavao, Interviewer.

¹⁶Morrison, C., & Knapp, S. (2012, May 8). (J. Fuavao, Interviewer)

market overview

DEMAND FACTORS

Fresh coconuts are considered a mainstream product however demand is seasonal. The demand for fresh coconuts is reportedly higher in the summer and slows during the winter period.

A strong demand for fresh coconuts was identified from the Asian and Pacific Island communities. According to the 2006 Census, 265,974 people of Pacific ethnicity and 354,552 people of Asian ethnicity were in living in New Zealand¹⁷. Between 2001 and 2006, the Asian and Pacific Island ethnic groups showed the largest population increase¹⁸. The Asian ethnic group increased from 238,176 to 354,552 people in 2006 (an increase of almost 50%). While the Pacific Island ethnic group increased by 14.7%, from 231,801 to 265,974 people during the same period. The majority of people from both ethnic groups resided in Auckland. About 18.9% of Auckland's population identified with the Asian ethnic group while 14.4% identified with the Pacific Island ethnic group¹⁹.

A recent study on the shopping habits of New Zealand consumers, specifically examining the where and how often²⁰ consumers were shopping found that that most people purchased their food and drink from the supermarkets weekly or more often. The Health Promotions Agency (2012) found that most people (86.9%) said that their households purchased food and drinks from supermarkets weekly or more often.

The Health Promotions Agency (2012) found that Pacific Island and Maori households tended to shop for food and drinks more frequently at green grocers, convenience stores and takeaways than European/Other households. Similarly younger people tended to buy their food and drink more at convenience stores (e.g. petrol stations, dairies) and takeaways more than older people.

Health Promotions Agency (2012), key findings include:

- Pacific Island and Asian people tended to shop more than once a week at green grocers such as small fruit and vegetable stores and farmers markets. Asian (27.6%), Pacific Island (25.4%), Maori (18.7%) were more likely to buy food and drink 'more than once a week' from green grocers compared with European/Other people (9.7%).
- People who more likely to say that their household purchased food and drinks at convenience stores 'more than once a week' were Pacific Islanders (37.8%) and Maori (37.4%) compared with European/Other people (17.9%). Additionally this was found to be the case more with younger people than older people.
- People of Pacific and Asian ethnic background tended to spend less than European/Other people at grocery locations but not at non-grocery locations²¹.
- The survey found that the main factors that price was the main determinant of purchase. Other factors were (in descending order of importance): specials, freshness, quality, healthiness and taste.

¹⁷Statistics New Zealand (2006).

¹⁸The following demographic statistics relate to the 2006 census.

The 2011 census was postponed due to the Christchurch earthquakes. The census is now scheduled to take place in 2013.

¹⁹Auckland was the most ethnically diverse region in New Zealand - European (56.5%), Asian (18.9%), Pacific Islands (14.4%) and Maori (11%).

²⁰Health Promotions Agency. (2012). *Shopping behaviours of New Zealand households*. Wellington.

²¹Grocery locations: supermarkets and green grocers; Non-grocery location: convenience, takeaways and restaurants.

²²Ibid.

²³Baker, F. (2012, September 23). *Is coconut a superfood?*

KEY MARKET TRENDS

- There is an increasing demand for natural coconut products as consumers become increasingly educated about the health benefits and reduce their intake of sugars, salt and fats. Marketing those health benefits and educating consumers about how to use the product remains one of the barriers to growth for Pacific Island exporters.
- Now that the coconut is considered a healthy food, there is a shift in the market towards high-valued food uses for the coconut such as tender coconut water and virgin coconut oil²². Consumers are looking for high quality coconut products that fit into their increasingly busy lifestyles such as ready-to-eat meals and easy-access packaging. Presentation is important! The popularity of these products demonstrates the power of effective marketing and branding. For traditional products from the Pacific Islands, it highlights the potential to tap into mainstreams tastes through packaging that addresses both visual appeal and convenience.
- Quality standards and traceability have become paramount in the New Zealand market. Given the current state of the economy and the increasing concern around food safety, commercial importers are seeking to secure their supply chain by establishing long term relationships with its suppliers. To instil confidence in consumers, buyers have tightened their procedures and placed significant emphasis on complying with quality standards and food safety measures at every phase of the supply chain.

Importers, wholesalers, distributors and retailers alike are expressing greater interest in recognized certifications and standards. In the case of the supermarket chains, Progressive Enterprise (owned by Woolworths Australia) currently implement their own, the Woolworths Quality Assurance (WQA). New Zealand GAP and Hazard Analysis & Critical Control Points (HACCP) are considered to be the baseline in the market.

Consumers are actively researching the products they consume in an effort to know more about where the product is from; how it is grown or processed; and whether these have been done in a socially and environmentally friendly way. Consumers are looking for the 'value' in a product and are prepared to pay a higher price for it.



NUTRITION & HEALTH BENEFITS

Information on the nutrition and health benefits of coconuts has been a key selling point in the growing popularity of coconut products. Coconuts are nutritious and rich in fibre, vitamins, and minerals. Coconut products have been marketed and classified as a 'super-food' because it provides many health benefits beyond its nutritional content.

The health benefits attributed to the coconut include the ability to:

- enhance metabolism and energy that is burned as fuel rather than stored as fat;
- slow down the release of sugar into the bloodstream;
- reduce the risk of heart disease by increasing good cholesterol and lowering the ratio of bad and good cholesterol;
- treat digestion system disorders;
- treat and prevent strokes and brain disorders such as Alzheimer's.

The health benefits of coconuts remain a topic of debate as opponent argue that they are high in unhealthy saturated fat that raises the risk of heart disease by increasing the cholesterol level and clogs the arteries²³.

import statistics & information

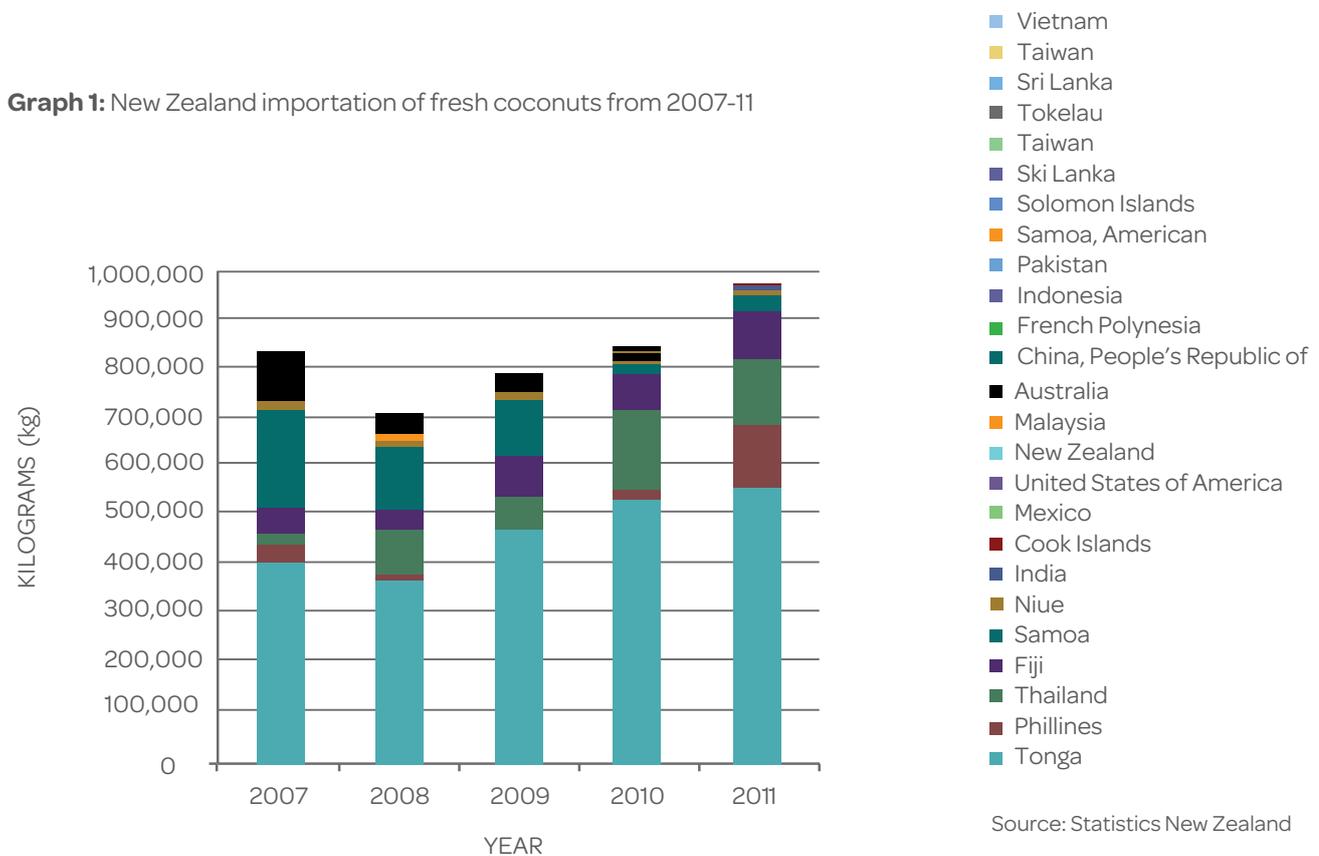
IMPORT STATISTICS

Graph 1 provides a breakdown of the total quantity of fresh coconuts imported into New Zealand by country of origin from 2007 – 2011. After initially falling by 16% in 2008, fresh coconut imports gradually rose from 852,677 kg in 2008 to 941,265 kg in 2011. This represented a 32% increase.

The number of coconuts imported from Thailand showed significant growth, increasing dramatically since 2007, when New Zealand imported approximately 15,558 kg to 130,816 kg last year. A sharp increase was also observed with imports from the Philippines where approximately 15,556 kg of fresh coconuts rose to 157,423 kg last year.

Another important trend to note was the reduction of coconuts imported from the Solomon Islands and Samoa. The Solomon Islands share of the market has remarkably eroded from possessing 13% in 2007 to none last year. For Samoa, imports declined from 214,500 kg in 2007 to 8,160 kg in 2010, which represented an 88% drop. Last year the number of fresh coconuts imported from Samoa increased to 24,540 kg.

Graph 1: New Zealand importation of fresh coconuts from 2007-11



Notably the type of fresh coconut, dry or drinking coconut, is not distinguished in these statistics. Therefore it is unclear whether the total growth in imports is due to an increasing number of drinking coconuts imported into New Zealand or a growing demand for dry coconuts. Importers identified Tonga and Fiji as the main suppliers of dry coconuts. While the Philippines and Thailand were identified as the leading suppliers of drinking coconuts.

In 2011, New Zealand imported a total of 941,265 kg of fresh coconuts to the value of \$NZ 836,676. Tonga has been the dominant player in the coconut market. In 2011, New Zealand imported about 530,988 kg of fresh coconuts from Tonga. This accounted for approximately 56% of total fresh coconut imports. New Zealand imported approximately 91,584 kg of fresh coconuts from Fiji which accounted for about 10% of total fresh imports. The Philippines and Thailand were also main suppliers to the market, contributing 17% and 14% to the overall fresh coconut imports.



TRANSPORTATION

The Pacific Islands are major suppliers of dry coconuts to the New Zealand market. Most buyers consulted were supplying the market regularly with dry coconuts from Tonga or Fiji, importing a 20 foot full container load (FCL) by sea freight every week.

Thailand and the Philippines are the main suppliers of drinking coconuts to the New Zealand market. Drinking coconuts from the Philippines are transported via chartered vessel every fortnight which brings the Dole brand of fresh bananas, papayas and pineapples. However, the drinking coconuts from Thailand are imported on a consignment basis²⁴. The ability to achieve economies of scale is a key competitive advantage for both countries.

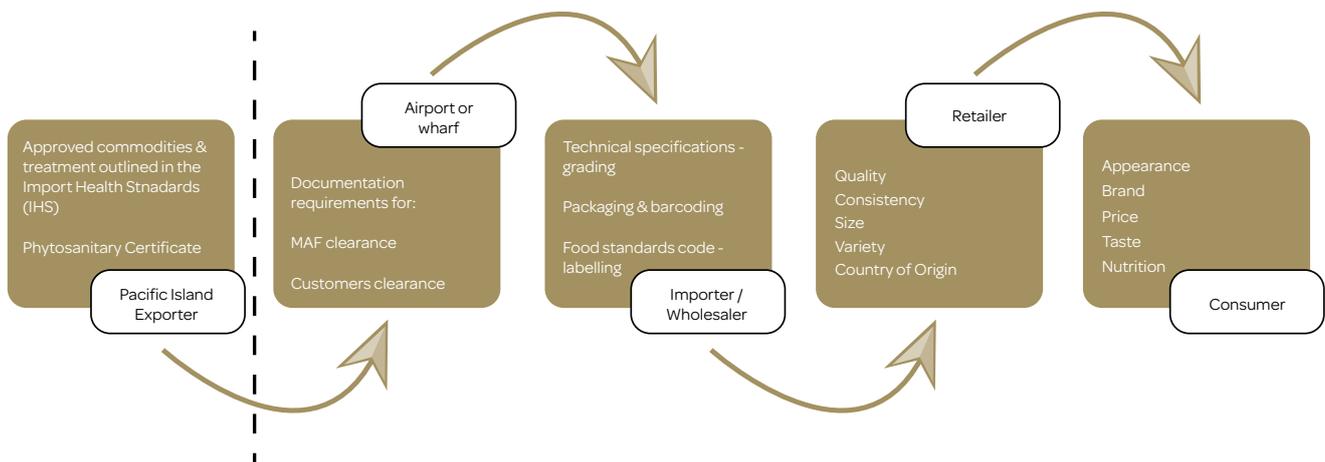
²⁴Lange, P. (2012, May 29). J. Fuavao, Interviewer.

market requirements

EXPORT PROCESS

Graph 2 presents an overview of the export process as well as some key factors that are assessed at each stage. It requires an understanding of the market requirements such as biosecurity measures and food and safety requirements. There are costs to be considered at each stage of the process before the product reaches the consumer. These costs include handling, clearance fees and wholesale / retail margins. All of which increases the costs which subsequently affects the retail price.

Graph 2: General export process from the Pacific Islands to New Zealand.



Once the consignment receives biosecurity clearance, the New Zealand buyer generally grades and sorts the produce again according to their quality standards. Fresh produce earmarked for the supermarkets are packed into specialised plastic crates then transported to the supermarket distribution centres. Importantly the wholesalers have noted that the quality of the produce is assessed again by the supermarket against their own quality standards. For example, Progressive Enterprises which own the Countdown supermarkets implement their own quality standards called the Woolworths Quality Assurance (WQA).

Consistent supply and quality continues to be stressed by importers as the main challenges with Pacific Island imports. Similarly the importers have emphasized the need for improved communication and coordination with the Pacific Island exporter.

The exporter must remember that when exporting products to New Zealand to contact the buyer, so that their customs agent is made aware of the arrival of the goods. This will help with the quick release of the goods to the buyer.



QUARANTINE REQUIREMENTS

All fresh fruit and vegetables are prohibited entry into New Zealand unless they are covered by a valid Import Health Standard (IHS)²⁵. An IHS sets out the certain conditions for a specific product that must be met before it can be imported into New Zealand.

Fresh coconuts are permitted entry into New Zealand provided that they adhere to treatment as specified by the Standard Conditions for importation of fresh produce by the exporting country. Prior to its exportation to New Zealand, there are several quarantine requirements that exporters of fresh coconuts in the Pacific Island countries must follow.

For fresh coconuts, the consignment must:

- Be inspected by the exporting country's national plant protection organization (NPPO) in accordance with the appropriate official procedures, ensuring that the consignment is free of any visually detectable regulated pests as specified by New Zealand Ministry of Agriculture and Forestry.
- Undergo the pest control activities prior to export;
- Be accompanied by a valid and completed Phytosanitary Certificate - a certificate issued by the authority of an exporting country, in accordance with the requirements of the International Plant Protection Convention (IPPC), which verifies that the requirements of the relevant import health standard have been met;
- Be in clean packaging – free from soil and other contaminants;
- Not have soil contamination in excess of 25 g per 600 units²⁶;
- Not be contaminated with foliage in excess of one leaf per 50 units

Market access for the importation of fresh coconuts into New Zealand is currently in place for the Cook Islands, Fiji, Kiribati, New Caledonia, Niue, Papua New Guinea, Philippines, Samoa, Solomon Islands, Tokelau, Tonga, Tuvalu and Vanuatu.

Import Health Standards for desiccated coconut stipulates that certification and inspection is not required if it is packaged for direct retail sale or packs up to and including 25 kg. Inspection is required for dried coconut (whole or pieces) without the husks and outer shell .



²⁵MAF Biosecurity New Zealand Standard: 152.02: Importation and Clearance of Fresh Fruit and Vegetables into New Zealand. (May, 2012).

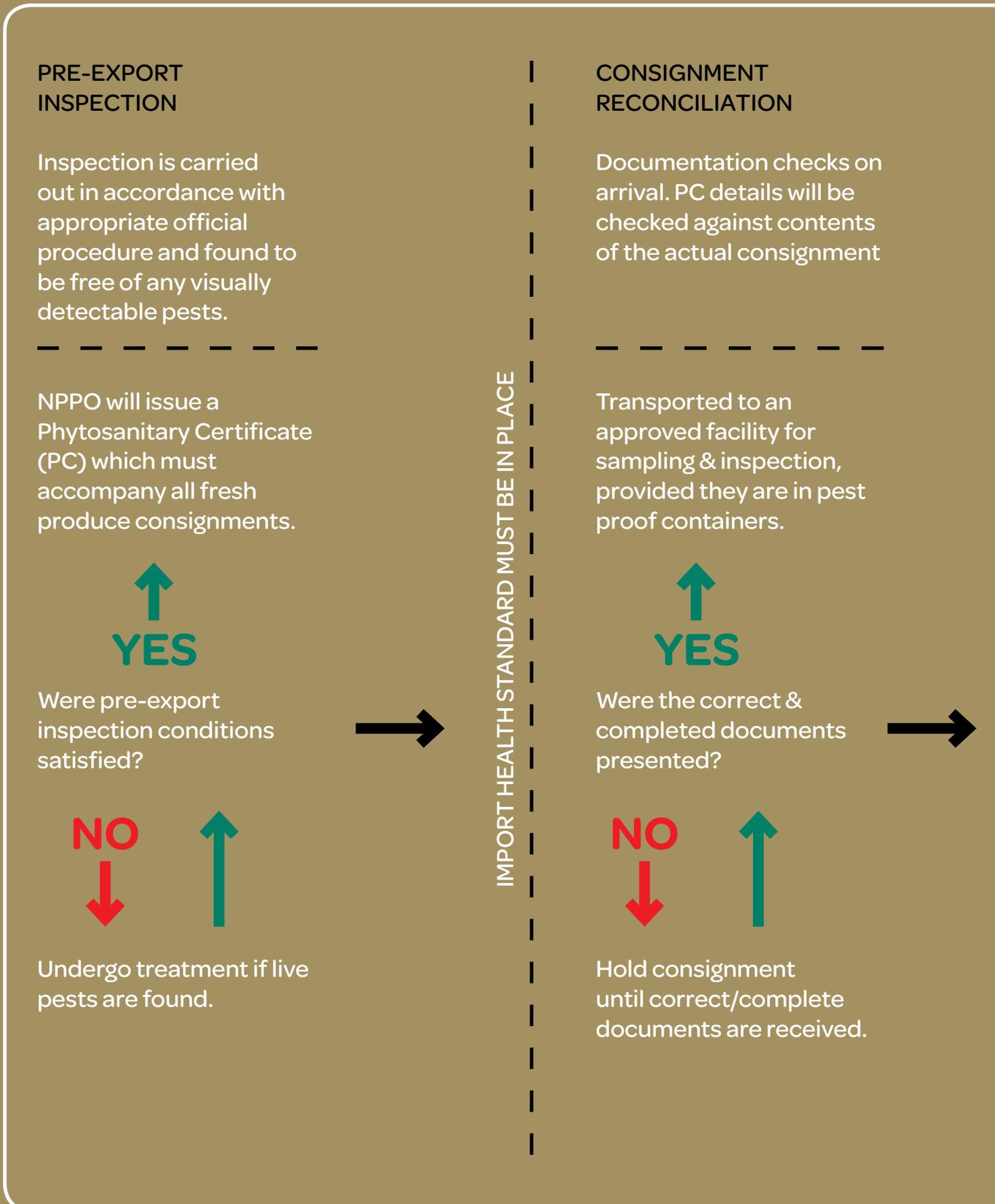
²⁶Onus will be on the NZ importer to decide whether to wash it free of the soil, reshipe or destroyed

²⁷Import Health Standard (IHS) for 'Stored Plant Products for Human Consumption. (January, 2012).

²⁸Graph 3 adapted from MAF Biosecurity New Zealand Standard:

152.02: Importation and Clearance of Fresh Fruit and Vegetables into New Zealand.

Graph 3 presents an overview of the clearance process for fresh fruits and vegetables imported into New Zealand. Importantly failure to comply at any stage of the clearance process can be costly for the importer and ultimately affect its product's value on the market²⁸.



INSPECTION & SAMPLING

Inspection carried out on individual unit & packaging, for the presence of pests, seeds, signs or symptoms of disease, soil or any other contamination.

A sample is taken from any part of the lot including selection of cartons /packages from different areas of the lot.

Proceed to biosecurity clearance process.


YES

Was the consignment free of contamination?

NO


If a live organism found, importer has the option of:

- Pest identification,
- Treat,
- Reship, OR destroy

BIOSECURITY CLEARANCE

A written biosecurity clearance shall be issued by an inspector for each consignment/lot of imported fresh fruit and/ or vegetables cleared for entry into New Zealand.

Final document check including a Treatment Certificate if the shipment was treated before cleared for entry into NZ.



PEST ID / TREATMENT

Is the pest, a regulated pest?

• YES: Treat, reship or destroy

• NO: Proceed to final clearance process

• 'Unlisted': unlisted organism will be reported to MAF for advice on the fate of the consignment.



market requirements

DOCUMENTATION REQUIREMENTS

Discrepancies in the paperwork have been highlighted as one of the issues at the border with consignments from the Pacific Islands which delayed the clearance of shipments from the Pacific Islands. The document must match what is in the container this issue is particularly prevalent with informal consignments²⁹.

Upon arrival in New Zealand MAF inspectors will check the relevant documents. If incorrect or incomplete documentation is presented, the consignment will be held in a transitional facility until the correct documents are presented.

To ensure that there are no delays upon arrival, it is important that the correct documents are presented such as the Phytosanitary certificate, quarantine declaration, bill of lading, airway bill or invoice to the satisfaction of the MAF inspector.

Note that in the case of:

- Tokelau: an export certificate issued by the Government of Tokelau may be accepted in lieu of a Phytosanitary Certificate;
- Tuvalu: Additional declarations on the Phytosanitary certificate are required. These declarations must stipulate that the consignment of coconuts has been inspected in accordance with appropriate official procedures recognized by the Ministry of Primary of Industries. The Phytosanitary certificate must also declare that the coconuts in the consignments have undergone the appropriate pest control activities for high impact pests notably - *Chrysomphalus aonidu*, *Chrysomphalus dictyospermi*, *Wasmannia auropunctata*³⁰.

INSPECTION

Some importers have MAF approved inspection facilities onsite which will receive the consignment after the initial clearances at the border. These importers usually book for consignment inspections onsite with the Ministry of Primary Industries (MPI). Shipment delays can result in the need to rebook a MAF inspector which will cost the importer as well as delay the availability of the product on the market. This can be a delay of up to 24 hours³¹.

Pests usually intercepted with consignments of coconuts from the Pacific Islands were noted to be: ants, mealy bugs and spiders for unhusked green coconuts while mites are usually found on brown husked coconuts³².

Graph 4 shows the number of sea containers from the Pacific Islands that were inspected by MAF and found to be highly contaminated. The data shows that the containers inspected from the ports of Kimbe (Papua New Guinea), Nukualofa (Tonga), Port Vila and Santo (Vanuatu) were found to have the highest number of containers with contamination. The main type of contamination found on containers from the Pacific Islands was soil on the exterior of the container. In addition to soil, plant products and insects was found on containers from Nukualofa, Tonga. Straw was found on the exterior of containers from Kimbe, Papua New Guinea.

A six-sided inspection is conducted on the container if the exterior is found to be contaminated then the importer has to organize the transportation and washing of the container at their cost. The cost of washing was estimated to be about NZ\$75.00 not including the cost of transport.

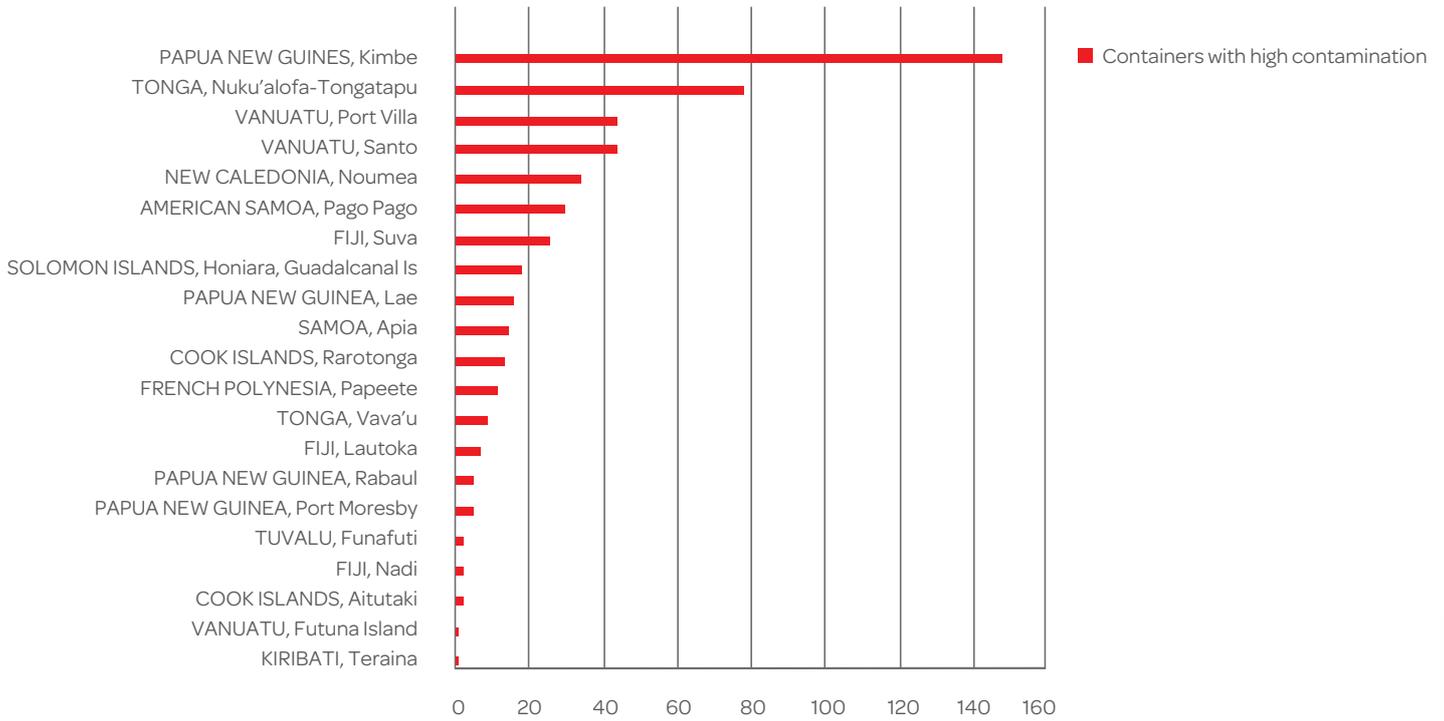
²⁹Tohovaka, S., Barker, R., & Roberts, B. (2012, April 27). *J. Fuavao, & T. Mato, Interviewers.*

³⁰Ministry of Primary Industries (2009)

³¹Hogg, G. & Coombes, P. (2012, April 19). *J. Fuavao, Interviewer.*

³²*Ibid.*

Graph 4: Sea containers from the Pacific Islands inspected and found to be highly contaminated, 2011



Source: Ministry of Primary Industries, 2012



market requirements

TREATMENT PATHWAYS FOR PACIFIC ISLAND COUNTRIES

Any foliage or soil contamination found to be above the acceptable level of tolerance, shall be washed (soil contamination); or resorted (foliage contamination); reshipped or destroyed all at the importer's option and expense.

If live insects are found in the consignment, the container would need to be fumigated. Costs associated with the clearance of the consignment including treatment will be the responsibility of the importer³³.

PACKAGING FOR EXPORT

Biosecurity New Zealand requires the packaging of fresh fruits/vegetables must be clean, free from soil and other contaminants. All packages must be sealed with a destructible sticker/label identifying the authority in the exporting country and directly traceable to the Phytosanitary Certificate.

Dry coconuts are packed in polypropylene sacks with 20 or 22 counts in each bag. In most cases the sizes of the coconuts in the bags are mixed. One New Zealand importer reported that they grade the coconuts and repack them into four different coloured bags based on size. The dry coconuts are repacked into 16, 18, 20 and 22 count bags. The largest coconuts are packed into the 16 count bags.

Drinking coconuts from the Philippines and Thailand are trimmed, bleached then wrapped in plastic before they are packed in cartons and palletized for export to New Zealand. There are 9 drinking coconut packed in each carton.

Dry coconuts are generally husked before export while drinking coconuts from the Pacific Islands are shipped with the husk on. Some importers prefer the coconuts to be husked and packaged in bags while other importers would prefer the coconuts to be unhusked and packed loose in the containers. It is important to clarify with the importer what their packaging requirements are.

PACKAGING FOR RETAIL

In terms of packaging for retail, all value added food must comply with the packaging and labelling regulations in New Zealand. Packaging for retail must effectively address:

FOOD SAFETY ISSUES: It must protect its contents from deteriorating from heat and moisture, etc. It must be able withstand rigorous distribution and handling. Reliable packaging will be able to prolong the shelf life of the product;

CONVENIENCE: The product must be easy to use. Consumers should be able to gain access to its contents;

AFFORDABILITY: Consumers must be able to afford it;

VISUAL APPEAL: The package design must be attractive in order to compete with the other products on the shelves.



Image: Dole's 'Young coconut' product imported from the Philippines on sale in the supermarkets of New Zealand

³³Tohovaka, S., Barker, R., & Roberts, B. (2012, April 27). J. Fuavao, & T. Mato, Interviewers.

LABELLING FOR RETAIL

Information that must be labelled on a packaged product includes³⁴:

- A use by or packing date
- Product name or description
- Name and physical address of the manufacturer / importer / distributor:
(A postal address alone is not enough)
- Warning and advisor statements: are required if certain ingredients have been used in the product³⁵. The warning statement need to have specific words and must be at a height of 3mm or more. Certain ingredients such as eggs, gluten and nuts need to be declared as they can cause severe adverse reactions in some people.
- A list of ingredients: listed from the greatest amount to the smallest amount of ingoing weight including water.
- Use and storage instructions
- Nutritional information panel
- Country of origin
- Labelled in English – the information may be presented in other languages however it must not be different from the information presented in English.

Importantly the information presented on the labels must be legible and prominently displayed in contrast to the background. The information on the label must also be clear and accurate.



³⁴ New Zealand Food & Safety Authority. (n.d.). Guide to comply with labelling requirements. Retrieved July 2012, 1, from New Zealand Food & Safety Authority. www.foodsafety.govt.nz/elibrary/industry/labelling-guide.pdf

³⁵Ingredients such as aspartame, quinine, guarana, caffeine, unpasteurised milk and egg products etc.

competitive landscape

COMPETITION

The market for fresh coconuts in New Zealand is small where competition is amongst a few commercial buyers, with price as the main basis for competition. For dry coconuts, the market is dominated by supplies from the Pacific Islands namely Tonga. Given the steady supply, favourable size and quality of the dry coconuts from the Pacific Islands it was not seen as an attractive market for a new entrant.

The market for drinking coconuts was seen as a more attractive market for suppliers from the Philippines and Thailand who had a point of difference in the market – lower price and better packaging. Both suppliers have been to market the product effectively by delivering an attractive and user-friendly product.

It is difficult for the Pacific Islands to compete directly with the sales strategies employed by the Philippines and Thailand which generally entails heavy promotion and discount sales. It is estimated that as much as 60% of products are bought on promotion in New Zealand³⁶. In order to compete effectively against the Philippines and Thailand, the Pacific Islands must develop a point of difference in the market and be priced competitively.

MARKET PLAYERS

There are only a few commercial importers competing in this market as well as a few private importers. The main players were identified as Fresh Direct Ltd, Turners & Growers, Tropical Fresh Ltd, MG Marketing and Progressive Enterprises.

Fresh Direct Ltd, Tropical Fresh Ltd and Turners & Growers were considered to be the main players in the market for dry coconuts. Dry coconuts are sourced primarily from Tonga. Fiji was also reported to be exporting a small volume of dry coconuts to New Zealand.

MG Marketing is the leading supplier of drinking coconuts which they source from the Philippines and Thailand. The company is the exclusive agent for the Dole brand in New Zealand. As well as drinking coconuts, Dole is a major player in the market for fresh papaya, pineapple and banana. The competitive advantage for these suppliers is economies of scale. The drinking coconuts from the Philippines are transported by sea freight on a fortnightly basis, together with the Dole brand of papayas, pineapples and bananas. Drinking coconuts from the Pacific Islands have been inconsistent. In recent years, they have been sourced from the Solomon Islands, Tonga and Samoa although inconsistently through the informal network and commercial buyers such as Tropical Fresh Ltd.

³⁶Luff, B., & Trogolo, M. (2012, May 2). J. Fuavao, Interviewer.





competitive landscape

PRICES

Importers noted that this price is usually stable throughout the year. Last year there was very little change observed in the wholesale price for dry coconuts which was reported to range from NZ\$1.30 - NZ\$1.40 each from Tonga.

Retail prices observed at the supermarket were NZ\$5.80 for drinking coconuts from Samoa whereas the product from Thailand had a retail price of NZ\$3.98.

As a general rule of thumb, the product must be able to be landed at half of its retail price for it to be viable³⁷. This rule can be applied to the retail products of the competition as a very rough guide for Pacific Island exporters to get an idea around their pricing. The reality is that there are a number of costs involved between the exporter and end-user. Costs include clearance, treatment, transport, packaging, storage, wholesaler and retailer's margin.

KEY SUCCESS FACTORS

RELATIONSHIP BUILDING: Building a relationship with the buyer is critical factor for success. Advice from New Zealand importers is to establish a relationship and gradually build your exports, seeking to improve with every shipment.

New Zealand buyers have expressed their preference to coordinate with one main person and maintain this line of communication particularly in the case of large groups such as cooperatives where one person acts as the main liaison between the buyer and growers.

A common point of disagreement is the state in which the product arrives in the market. It leaves the port in good condition and arrives in New Zealand in poor quality. As means of improvement, one importer immediately takes a picture on his smart phone and immediately sends the image to the exporter. From there the parties discuss how they can improve with the next shipment. Constant communication and regular market visit can help strengthen the relationship and ensure that a quality product reaches the consumer.

PRODUCT QUALITY: Consistency in supply and quality are the main challenges for Pacific Island exporters. It would difficult to compete head on with the like of the Philippines and Thailand in terms of volume therefore opportunities are in niche markets. From the limited supply available it important to ensure that the quality is right as importers suggest that there is a market if the quality is good. For fresh coconuts, the key quality indicators importers look for are primarily based on visual appearance, size and shape.

*Fiji Mana Coconut Oil
Credit : PT&I - Chris Brimble*

³⁷Hunter, J. (2012, April 17). J. Fuavao, Interviewer.

competitive landscape

PRODUCT DEVELOPMENT: Innovative products that address consumer demand for convenience and quality provide Pacific Island exporters with good potential to attracting interest from New Zealand buyers.

There is a range of coconut products available on the market. The coconut's versatility demonstrates the potential for new product development and value-adding across a range of product sectors. It is a key ingredient in the baking industry and it has been applied in confectionary and beverages. Further research into their nutritional value and understanding of their application in various food sectors can lead to new market opportunities.

MARKETING & BRANDING: It is important for an exporter to identify the target market(s) for each product it offers particularly if the vanilla products are earmarked for retail. The packaging especially its appearance and marketing needs to be tailored to suit. Key question – what is your point of difference?

Consumers are placing greater emphasis on knowing the journey of the product, from farm to market: how it is grown; whether any chemical were used; and how producers benefit from export sales. Companies recognize that consumers will undertake some research on the product therefore they offer more detail on their websites and deliver their story using several channels such as Youtube and Facebook. With the great interest in the health benefits of the coconut, marketing coconut products should incorporate a clever mix of an origin story, how to use it and nutritional information.

Examples of the messages used in the marketing of coconut products:

- LOVING EARTH, COCONUT SUGAR: "Organic Coconut Sugar from the Island of Java in Indonesia. Considered the most sustainable sweetener in the world, Coconut Sugar is a great tasting, mineral rich, low GI (35) cane sugar alternative, produced from coconut palm blossoms³⁸."
- OQUA, COCONUT WATER: "Nature's Original Isotonic Drink. Coconut water hydrates the body and replenishes vital nutrients lost during work-outs. Refreshing and nutritious, OQUA Organic Coconut Water is from organically grown fresh, young green coconuts."



³⁸Glycemic Index (GI) is the measurement of glucose level increase from carbohydrate consumption.

STRATEGIC OPTIONS

Growth opportunities for fresh coconuts were identified in:

(1) A regional approach to supplying the market:

Given the difficulties in supplying the market, New Zealand buyers suggested that the Pacific Islands explore a regional supply approach where a combined schedule is developed and coordinated between countries to meet the supply shortages.

The growing demand for coconut products is expected to add pressure on supplies; it should strengthen prices for coconuts producers, who should get a higher price in the long term. This will serve as a great incentive to continue and expand production³⁹.

In most cases, Pacific Island products have entered the market successfully however exporters struggled to sustain the market as growing orders exert pressure on their production and operation systems. It is a challenge to sustain the existing market when growth opportunities are presented in other international markets. A collaborative regional approach to supply would permit market expansion whilst maintaining a strong presence in the New Zealand market.

(2) Value added coconut products:

The opportunity for Pacific Island exporters is in value added goods particularly in niche market however this would require significant investment of time and energy into branding and marketing aspects of the business in order for the product to compete effectively on the shelves. With many competing brands and substitute products on the market, there is a need to develop a point of difference. Information such as the nutritional analysis and bar coding would need to be factored in for products earmarked for retail.

(3) Internet sales:

The internet has the potential to boost sales for Pacific Island exporters, providing the opportunity to reach global consumers and look at global trends. Internet technology provides an opportunity for any individual to enter the market, but there is the risk that competition among many small sellers will force the price down. Collaborative marketing has much to offer⁴⁰.

(4) Certified organic and Fair Trade coconut products:

There is a growing market for certified organic and Fair Trade products as the consumers seek verification of the product, placing more emphasis on recognized certifications. There is an opportunity to build a strong origin story on top of a recognized certification. The cost and procedure for certification has been a concern for Pacific Island exporters. Given that in most cases the same auditor are used to undertake the process for the organic and Fair Trade audit, there are discussions now which are exploring the scope for combining the procedure to reduce the cost⁴¹.



Coco Natural Coconut Oil
Credit : PT&I - Chris Brimble

³⁹United Nations Conference on Trade and Development. (2012, April 27). AAACP Products: Coconut.

market entry strategies

MARKET ENTRY OPTIONS

New Zealand is a suitable market to test Pacific Island products given its proximity, Pacific Island communities and the small size of the market. Exporting is an expensive and can be a complex process.

One of the challenges highlighted in discussions with New Zealand importers is the ad hoc approach to exports. There is a need to develop process and procedure around systems such as payments systems. New Zealand is a small market that is considered to be a good testing ground for Pacific Island exporters to develop systems and gain insight into entering market before it can springboard into other international markets.

1. INFORMAL MARKET ENTRY

Fresh coconuts from the Pacific Islands are also imported through the informal channel and often handled by a family member or friend. The quantities are small and often sold at the flea markets or directly to small retailers.

There is an opportunity for Pacific Island exporters to establish a foothold in the market through informal channel and gradually expand into a formalized commercial system as they develop a better understanding of the market and commence discussions with potential importers and distributors. The strategy is for the exporter to leverage its strengths at the community level to promote the product while making a transition into commercial system.

2. ESTABLISHING A RELATIONSHIP WITH A COMMERCIAL IMPORTER

Entry into the New Zealand market for fresh produce is effective through an importer with the established systems and infrastructure required to handle and distribute the product effectively in the market.

A structured approach to the market is recommended. Research the market prior to engaging in discussions to identify the opportunity and understand the process required for export. When approaching potential importers it is useful to have the information on your company and product readily available such as:

- Company profile
- Product range and profile
- How long you've been in business
- Export experience: current export markets if any
- Product specifications covering different varieties available
- Supply capacity: what quantities are available
- Frequency of supply including seasonal variations
- Packaging
- Terms of trade (minimum orders etc.)
- Shipping/Freight schedules
- Price of your product range: include any discounts for large orders etc.
- Business card with a list of all contact details

Once a relationship has been established it is important to build on it by keeping the buyers informed of what is happening. If the product appears to be competitive and can meet the New Zealand market requirements, then an importer may want to proceed with a trial shipment.





KEY DIFFERENCE

- functional food high in Lauric fatty acid
- no trans-fats
- no hydrogenated
- no cholesterol
- most stable
- coconut oil
- healthy lipid life

PRODUCT OF THE SOUTH PACIFIC

niulife
EXTRA VIRGIN
COCONUT OIL
100% CERTIFIED

KEY REGIONAL ORGANIZATION CONTACTS

FOOD AND AGRICULTURE ORGANIZATION (FAO) OF THE UNITED NATIONS

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