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TOP SCHOLAR



Mana Tohu Mātauranga o Aotearoa
New Zealand Qualifications Authority

Scholarship 2024 Agricultural and Horticultural Science

Time allowed: Three hours
Total score: 24

ANSWER BOOKLET

Check that the National Student Number (NSN) on your admission slip is the same as the number at the top of this page.

Write your answers in this booklet.

If you need more room for any answer, use the extra space provided at the back of this booklet.

Check that this booklet has pages 2–23 in the correct order and that none of these pages is blank.

Do not write in the margins (/////). This area will be cut off when the booklet is marked.

YOU MUST HAND THIS BOOKLET TO THE SUPERVISOR AT THE END OF THE EXAMINATION.

QUESTION ONE: Agricultural and horticultural production in a regulatory environment

Primary production system: Dairy

PLANNING

DMA

N-Cap. 490

~~FFP~~ FFP

ETS - Gone

MFR - David Segman

↑ Hard for 2022

NZIER / riparian
plc. H2
↑ Southland
farming
Catt's V
R. R. W. X

FTAs

Market Future. --

Canada - \$200 mil

China - \$387 Ha

↑ but also \$700m in savings

Chloe Swarbrick
Amanda
↑ Greenpeace spokesperson
Todd McClay
↑ "Unacceptable, regulations"

labelling - language specific
↑ bilingual

Bovaer

Groundwell

EDA

Begin your answer to Question One here:

Regulations serve as a mechanism for changing the behaviour of economic agents so that they quantify their negative externalities. Historically, New Zealand has had minimal regulations for dairy (i.e. since Rogerson's); however, as with the turn of the century the environmental and cultural ~~cost~~ consciousness of consumers and their governments has grown greater, leading for the world has resulted in the introduction of regulations that affect the way that ~~dairy farmers~~ ^{dairy farmers} sell their products. The dairy industry grows and markets their products.

(11N-cop)

In 2021, a limit on synthetic nitrogen was introduced, requiring farmers to report their synthetic nitrogen usage and limit their synthetic nitrogen usage to 420 kg per hectare. From an environmental perspective, this ~~has~~ ^{is} ~~the~~ ^{is} synthetic nitrogen can place risks of contaminating waterways. This is of concern as around 60% of NZ's waterways are already considered as unsuitable. Additionally, ~~poor quality~~ ^{contaminated} water can place individuals at risk for cancer and risks of premature babies in pregnancy (i.e. drinking water ^{with high nitrogen levels}). Moreover, from a cultural standpoint, water is highly valued in Māori culture and is considered as a bringer of life; however, with contamination that has been observed in places such as Lake Ellesmere ^{at} (near Christchurch) as a result of dairy farming, there has been growing concern ~~concerns~~ for needs for regulations such as the N-cop to be introduced. However, from

on economic perspective, it is a cap on synthetic nitrogen regimes that limits the profitability for dairy farmers. Many dairy farmers are opposed to such regulations for this reason — as has been seen with the the Grandson's tractor protest in 2022. This regulation also raises concerns in terms of compliance as only 61% of dairy farmers in 2023 reported their synthetic nitrogen usage. This is likely a result of the discontent that the farmers have with the such regulations.

However, with what is most notable about regulation in context of dairy farming, is the perceived lack of connection between the regulation and the needs of dairy farmers. Todd McElroy has promised dairy farmers that he will 'get [regulations like dairy farming regulation] out of Wellington'.

A report by the New Zealand Institute of Economic Research (NZIER), however, revealed an interesting point. Dairy farmers are in support of regulations that support best practices (i.e. will help to build the value of their goods as a premium) but are strongly against regulations that they don't perceive are in the best interests of dairy farmers. For example, the Freshwater Farm Plans (FFPs) which are a part of the Resource Management Act (RMA) do not obligate

farm doing farms to have a freshwater Management
~~System~~^{Plan} in place with in terms of preventing runoff
 etc. due to water from cows & by building
 fences and completing riparian planting. However,
 the average cost of compliance for this regulation
 is estimated at around \$20 thousand, on average,
 for each farm. While this ^{regulation} policy has been passed
 for some time & for further consultation with
 stakeholders, it does result in a reduced
 farmer confidence, especially when many farmers
 are facing other costs of production. In a
 recent Robobank Rural Confidence Survey⁽²⁰²³⁾, it was
 revealed that dairy farmer confidence is at
 an all time low in the survey's 20 year history
 at 19%, with one of the four main concerns
 by dairy farmers being ^(unworkable) government regulations. Thus,
 while these regulations are 'unworkable' on
 dairy farmers may be may limit profitability since
 it leads to lower production and higher compliance
 costs for both the government, and the ^{small} farmers,
 and those in the industry, it is also necessary
 to consider how regulations lead to reduced farmer
 confidence, which ultimately leads to many farmers
 choosing to leave the industry not scale their production further,
 & in some cases, even choosing to leave the
 industry, which places the dairy farming's future at
 risk.

Looking at another part of the primary

production system - the marketing ^{dairy} - risks have been posed in terms of labelling. For instance, a recent ^{review} ~~review~~ was reviewing the regulations around ~~baby~~ ^{infant} powder, which uses dairy products in production (ie ~~dairy~~ ^{powder} milk powder). While this review decided against requiring the perceived health benefits of ~~baby~~ ^{infant} powder being removed, such instances reveal the major challenges around labelling regulation. If these perceived health benefits had been removed in favour of including information about natural breast feeding - as midwives recommended - then profitability would have been limited not in Asian countries only and this would have resulted in a loss of \$42 jobs for Danone and a loss of \$1 billion.

(co-leader of Green party)
 *6 Will Chloe Swarbrick ^v saying that the government is "backtracking climate change" by not introducing stricter regulations and removing dairy from the emissions trading scheme

However, it also necessary to consider how regulation can constrain all social, environmental, and economic factors. With all of the previous regulations discussed, there ~~needed~~ ^{was} to be a trade-off - i.e. sacrificing economic gain for the benefit of social and environmental

Sustainability, ~~about~~ as this sustainability is important for ~~pro~~ ~~maintaining~~ the ~~design~~ ~~market~~ entering NZ's future ~~However~~ (con- by incorporating guidelines around intensive winter grazing for environmental sustainability but at the loss of economic gain). ~~An example~~ However, the food additive Bovaen, which reduces methane emissions of dairy cows by around 30% (based on European records), has faced constant regulatory challenges in getting approved, despite being approved in 55 countries.

This is since it took 2 years to be approved by the EPA ^(environmental protection agency) and is still waiting on approval for the use as feed for animals. This places potential environmental gains in jeopardy since N_2 producers are unable to benefit from this while also losing economic gains or not using this additive.

QUESTION TWO: Weather events and climate change

Primary production system: kiwifruit

PLANNING

June 2023 ✓ March to Nov for kiwifruit 80% of NZ kiwifruit in BOP
winter 1.4°C warmer

Cyclone Hale (Jun 2023) — BOP ✓

Cyclone Gabrielle (Feb 2023) — HB & T

Kiwifruit are very prone to flooding } SunGold are more delicate in general
↑ Suffocation (lack of oxygen)

Chile → growers moving south

↑ NIWA forecasts NZ may need to do some

Chilling Hours ✓ winter chilling. 200 to 800 hours for kiwifruit needed

Hyd. H-c (Hydrogen Cyanide) 528m

Risks with frost (sprinklers) & frost fans

↑ Warmer climates bring the risks of new pests

Technology as a means of resilience

↳ Also 20's (Global) — tried using in 2022 but 60% (need 20%)

Recent droughts in Panama Canal in Mid 2023

↑ Future risks of such kind

↑ Perturb to whole pps

↳ Limited shipping required for NZ exports to go as trans. (inn. kiwifruit)

133m vs 147m

Begin your answer to Question Two here:

As temperatures rise in New Zealand and globally and as an increasing number of 'once in a lifetime events' are being experienced, the future viability of the kiwifruit primary production system is placed at risk.

Kiwifruit require ^{primarily} green (Hayward), SunGold, & Ruby Red - ~~regime~~ are very prone to the risks of rising temperatures and extreme weather events. Kiwifruit typically require 700 to 800 hours of winter chilling for (i.e. the number of hours with temperatures below 7°C) in order to fully bloom. However, with winter temperatures in New Zealand rising (note that kiwifruit season is March to November), the ~~number~~ amount of winter chilling that kiwifruit are receiving in NZ is decreasing - and this trend is only predicted to continue. For instance, in June 2023, the temperatures in New Zealand were at a record high of 1.4°C above average. This, in part, ~~resulted in 2023~~ contributed to 2023 being a very poor season for NZ kiwifruit growers, as only ~~the~~ NZ earning a total of \$133 million in export revenue ~~for the~~ in 2023 as opposed to \$197 million in export revenue in 2024. Additionally, kiwifruit is very prone for flooding, so its kiwifruit needs a ~~dry~~ sunny and environment in order to thrive. This is the primary reason behind why Bay of Plenty is such an ideal place for growing kiwifruit, with around 80% of New Zealand's kiwifruit

being grown there. However, in recent years the Bay of Plenty has faced extreme weather events, such as Cyclone Haka in January 2023, which led to the flooding of kiwifruit orchards across the region. Additionally, Cyclone Gabrielle in February 2023, while not greatly affecting the Bay of Plenty, did affect other, smaller, but still significant kiwifruit growing regions in New Zealand such as Hawke's Bay and Gisborne. Notably, around 70% of the kiwifruit orchards in Hawke's Bay were significantly effected by Cyclone Gabrielle (in orchards were destroyed), which ~~meant that~~ hindered the future viability of growing kiwifruit for many of these orchards and resulted in ~~as~~ losses in revenue ~~for both stakeholders~~ for growers and Zespri.

As the production of kiwifruit continues to shift away from producing the green kiwifruit and towards the production of SunGold and RubyRed kiwifruit, ^{due to their greater profitability} ~~environmental~~ ~~weather~~ based considerations are only going to become more pertinent. Due to the thinner skin of SunGold and RubyRed kiwifruit as compared to green (Hayward) kiwifruit, the risk risks of weather events and climate change is more significant. This is since both SunGold and RubyRed kiwifruit are more vulnerable to the changes in climate and, due to their thinner skin, can be more easily damaged by extreme weather. Moreover, in...

*1 With SunGold Kimbault earning \$12.82 ~~OGR~~ ~~Standard~~ per tray orchard gate returns (OGR) in 2023/24 versus Green Kimbault earning \$9.55 per tray OGR.

- General, kinkrust is at a great risk of flooding since too much water in their veins ~~can~~ leads to a lack of oxygen for the kinkrust and thus leads to the death of these kinkrust.

In the looking into the future, NZIA projects that the amount of suitable land for kiwifruit will reduce, with the Bay of Plenty Plenty, & while still expected to remain a suitable location for growing kiwifruit, it being at risk of becoming less suitable for growing kiwifruit due to the expected reduction in winter chilling hours as a result of an increase in the mean winter temperature in New Zealand. In countries such as Chile (which is also in the Southern Hemisphere), growers it has been reported that growers have been needing to move further south in order to be able to achieve high blossom of kiwifruit. In the However, moving kiwifruit orchards south in New Zealand would be very costly and place strain on the production system since the majority of the infrastructure for kiwifruit in New Zealand (i.e. factories, labs for T2G, shipping facilities) are in the North Island, so moving kiwifruit orchards to the South Island would

* - hydrogen cyanamide has since had restricted placed on it - can only be applied once per year¹² by a professional between 1st July & 1st September

require not just the costs for moving orchards but also costs for moving processing facilities. This would be quite unsustainable in the short term due to high costs; however, this could present opportunity for long term sustainability. However, in New Zealand, hydrogen cyanamide is ~~not~~ (Akt. H-case) is ~~it~~ used on kumfruit orchards in order to simulate the effects of high winter chilling hours. ~~However, the~~ While from an economic standpoint the use of hydrogen cyanamide into the future could provide the kumfruit industry in NZ with a greater fighting chance against climate change (in terms of rising temperatures) since the abolishment of hydrogen cyanamide would cost the industry around \$20~~0~~ million per annum if it were to happen, ~~it must be looked at~~ from a social and environmental standpoint, hydrogen cyanamide can ~~pose the~~ contaminate ~~the~~ water if waterways if it is ~~used~~ gets into these waterways (e.g. due to poor use or over usage¹⁵), and from a social standpoint, ~~now~~ but both NZ society and consumers are very conscious about the environmental impacts of primary production systems (in their food production), so expanding the use of hydrogen cyanamide could risk eroding the clean image that New NZ upholds and firms like Zespri are able to leverage to gain a competitive advantage in overseas markets and charge a premium

in order to combat rising temperatures and reduced chilling hours

for New Zealand goods. Additionally, this would not fully address the risks of pests that come with warmer climates.

However, it is also necessary to consider how kiwifruit can render resilient against future extreme weather events. In many respects, the outlook is quite grim due to the extreme nature of these events. However, Zespri is investing \$18 million per year in research and development (R&D) in terms of breeding — this is as of December 2020 and Zespri plans to increase this to \$30 million per year in such R&D by 2030. A part of this R&D is developing new kiwifruit varieties that can withstand the future climate (as a result of climate change) — such as what ^{has} ~~was~~ ^{the} done with Zespri's Sun Gold kiwifruit² after the PSA outbreak in 2010. ^{was developed}

While current technology means that breeding takes around 20 years for a new ^{variety} ~~breed~~ of kiwifruit, new future technology with DNA testing at the seedling stage is expected to accelerate this process as traits of the kiwifruit will be able to be determined at the seedling stage. This ^{would} ~~will~~ be highly sustainable in all respects since it would mean that Zespri can more rapidly develop kiwifruit that is able to better withstand different climates (e.g. with lower winter cooling chilling hours) and also better withstand extreme weather.

QUESTION THREE: Exporting New Zealand's agricultural and horticultural production

Primary production system (1): Dairy

Primary production system (2): Kiwifruit

PLANNING

Reliance: - 90% K
- 95% D

Benefits: Small Country
Good R&D
Efficient

CHINA
31.29% Q 35%
Trump
Tariffs CPTPP
FTAs Europe (NZ-EU)
CER Area

Resources '84
PUR

10 years ago he paid \$16.80 for workers...
now he pays \$34 - \$35
Rob Thode

Green kiwifruit going into the market...
100% profitability — Michael French
from Seckin

\$380M
↑ Current Tariff
↓ duty

& 4.75% OCR

Begin your answer to Question Three here:

New Zealand, as a small country of around five million people, is heavily dependent on the exports of ~~our~~ agricultural and horticultural products, ~~and~~ ~~these~~ ~~are~~ especially for the dairy and kiwifruit primary production systems, ~~at which however~~ while exporting these products does provide NZ with a wealth of financial opportunity, it also places NZ at risks of ~~over~~ an overreliance on these exports.

Kiwifruit ~~last season~~ ~~export~~ contributed \$3.2 billion in exports, ~~in 2023~~ ~~from the~~ ~~previous season~~ ~~thanks to the better conditions and the fewer distributions.~~ ~~Over 90% of NZ produced kiwifruit is exported, with making up a total of 55% of all horticultural export revenue in New Zealand and making up 44.6% of the total export revenue for kiwifruit.~~ ~~This is very important for NZ as this provides a significant boost to the economy in terms of jobs (23,000 workers - also benefits Pacific Island nations as a under the New Zealand Second Employment (RSE) scheme), and in terms of export revenue (as mentioned), and the ability for NZ to innovate with research and development (R&D).~~ ~~Statistics, from the dairy, contributed \$23.7 billion in exports for the year ending March 2024.~~ ~~is also highly dependent on exports and provides a substantial benefit to the job economy and job market in New Zealand and provides around 55,000 jobs to the~~

work force. Over 95% of dairy products produced in NZ are exported, showing how NZ is highly dependent on dairy exports - especially given that ~~NZ~~ ~~makes~~ dairy makes up 24% of NZ's total export revenue. Similar opportunities and thus provided to dairy in New Zealand as it is to kiwifruit, with ~~the~~ the de Fonterra spending around \$400 million each year on R & D Cost compared to \$48 million for Zespri - which is still significant!

Additionally, NZ dairy farmers are some of the most productive and efficient in the world. In 1984, under the David Lange government, ^(i.e. after Muldoon) Finance Minister, Roger Douglas removed all subsidies for dairy farmers (which has been dubbed a 'Rogers shock'). This move required NZ dairy farmers to adapt to the free market and the lack of subsidies resulting in more efficient primary production system. (e.g. this resulted in a less dependence on fertiliser at that time)

Since then, the dairy has gone to become New Zealand's largest export industry, providing both economic and social advantages (e.g. employment).

For both dairy and kiwifruit, their largest export market is China, with dairy earning 35% of its export revenue from China and kiwifruit earning 31.29% of its export revenue

from China. However, the reliance on China does
 places threats for ~~both~~ ~~the~~ ~~both~~ the dairy and
 kiwifruit primary production systems and NZ as
 a whole. Firstly, for NZ as a country, earning a
 large amount of export revenue from China
~~means~~ ~~its~~ ~~abundance~~ ~~1~~ ~~new~~ means that NZ needs to
 have a strong relationship with China. This has
 restricted NZ's ability to comment on human
 rights in China, COVID-19, and other social ~~other~~
 instances (eg. Uyghur Muslims ^{being} mistreated). This also is a
 risk due to NZ's strong relationships with Australia
 and the ~~the~~ United States of America (USA),
 as these countries have historically had 'trade
 wars' with China - i.e. with ~~Australian~~ tariffs were placed
 on Australian oil into China and the USA had a
 trade war with China under Trump's first term of
 presidency. This means that if NZ were to go against
 China in any way, China could potentially regulate
 New Zealand exports (of which dairy and/or kiwifruit are
 would likely be included) through tariffs or other measures
 (eg. longer wait times in customs) to harm NZ's economy,
 despite this potentially being illegal and going against
 the ^{NZ's} free trade agreement ^(FTA) with China. ~~that~~ For instance, China
 showed discontent at the prospect of ~~the~~ NZ
 joining AUKUS Pillar II. Additionally, given the recent
~~the~~ Trump presidency, Trump has threatened to place up to 60%
 tariffs on Chinese exports, ~~at~~ ~~at~~ ~~up to~~ which
 China will likely retaliate to (as was seen in 2020),
 leading to a potential trade war that would

only risk NZ exports. To grow more resilient in this regard, NZ has been seeking to grow our exports — both for dairy and kiwifruit — into a wider range of markets. The government has been placing pressure on India to reduce tariffs on NZ exports such as dairy (India is very protectionist — tariffs are 30-60%); however, ~~these~~ ^{this} haven't come to fruition yet. However, this is revealing for the importance of expanding NZ exports into other markets. For instance, Zespri has been making innovations ~~both~~ in terms of their products, packaging, and marketing in order to appeal to a wider range of consumers. An example of this is the 'Fruit Pillbox' which Zespri has implemented in Singapore. This is effectively a medicine box, ^{except with kiwifruit} made with recyclable materials, which leverages behavioural theory so that consumers eat kiwifruit every day. Packaging of this nature is very appropriate for a Singaporean market where consumers are living very busy lives, often forgetting to eat their fruit. Another example is the Ruby Red kiwifruit variety which appeals to a growing Asian market due to its berry flavour (which is preferred in these markets) and its red colour (red is considered a lucky colour in China). These innovations allow for kiwifruit products to appeal to a wider range of consumers. Continuing to

make such innovations is necessary for the future resilience of the export markets since consumers inherently like variety. ^(ND) While it is more difficult to differentiate dairy goods due to their homogeneous nature as a good, firms have been able to innovate as seen with firms such as Lewis Road Creamery. Lewis Road Creamery has been able to sell their milk as a boutique product which is environmentally friendly (no pesticides) which appeals to a growing ^{international} market that is conscious about the environment. In this regard, despite being more expensive than regular milk (around \$4.00/litre versus around \$2.00/litre), Lewis Road Creamery has been able to build resilience in the supply of their milk to ^{locally} countries such as Australia, USA and Singapore.

However, one of the greatest risks that New Zealand faces with supplying export markets is the rising costs of production. For instance, Paparua ^{green kiwifruit} grower Rob Thode said "4 to years ago, I was paying \$16.50 an hour for workers, now I am paying \$35 - \$38 an hour". Unfortunately, for many growers of green kiwifruit, this is now coupled with low prices in per tray of OGR (\$6.02 in 2014 versus \$7.50 predicted for the coming season).³ Additionally, these growers are facing higher costs in terms of fertiliser and machinery. Moreover, given the ever-high interest

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Write the question number(s) if applicable.

QUESTION
NUMBER

- 2) Events such as cyclones. This also provides consumers with a ^{potentially} greater variety of kiwifruit and allows Zespri to expand into a wider variety of markets by means of developing different kiwifruit varieties (e.g. Ruby Red variety has been popular in Asian markets since red is a lucky colour in China and a berry taste is more preferred). In this regard, breeding of kiwifruit proves to be quite a viable option for future sustainability and viability of kiwifruit.

However, it is necessary to consider the entire primary production and how this can be made sustainable in the future. One major challenge in the face of climate change is shipping - which Zespri is highly dependent on since 90% of NZ kiwifruit is exported. For instance, in the winter last year (winter in Southern Hemisphere, summer in Northern Hemisphere), the Panama Canal experienced severe droughts which limited the number of ships that could pass through the canal each day, thereby raising the price of entry (i.e. for the canal). This meant that Zespri faced higher

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QUESTION
NUMBER

costs and some of Zespri's kiwifruit had to go on a train across Panama and then be put on a ship to continue to Europe (which makes up 31.27% of Zespri's export revenue last season) — so Zespri is highly dependent on the Panama Canal. Since the Panama Canal is the fastest way for Zespri's kiwifruit to get to Europe, it is far (and also avoids tensions in the Middle East / Red Sea) and rerouting around the bottom of South America would be unsustainable and unreliable due to high costs and longer shipping times (which is important given how conscious consumers are about food miles) so there is a risk Zespri has begun to produce kiwifruit directly in Europe. ^{*2} This initiative in the future ^{Expansion} would allow for New Zealand quality kiwifruit to avoid these climate related risks with shipping and help to maintain future viability. E.g. if a large cyclone hit the Bay of Plenty, then overseas Zespri supply could meet the demand for premium kiwifruit. (ZGS) ^{global}

*2 With 43% of Zespri kiwifruit now being ~~exported~~ ^{produced} grown overseas (87% in NZ) and processed.

Thus, it is clear that, while it will be

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Write the question number(s) if applicable.

QUESTION
NUMBER

challenging, Zealand and the kiwifruit primary production system as a whole has the opportunity to grow resilient to the negative impacts of climate change, ^{and extreme weather events} ~~ensuring~~ sustainability and viability into the future.

- 3) rates in New Zealand (OCR is at 4.75% and but was at 5.5% from Mid 2022-2023), for both kiwifruit growers and dairy farmers have been facing high rates on their mortgages, leading to financial stress. For instance, for dairy farmers, the according to the Rabobank Rural Confidence Survey, farmer confidence was at ^{in May} ~~the~~ 22% in the 2023 survey, the lowest in the survey's history. The dairy farmers also have around \$36.5 billion of debt. This raises concerns for the resilience of ~~ex~~ supply to export markets since low on farmer confidence means that these farmers are going to be less likely to export their products, leading to a ~~slow~~ stagnating growth in the industry. Also, dairy farmers have been facing down growing their milk production by 10,000,000 metric tonnes between 2018 and 2023, placing

Extra space if required.

Write the question number(s) if applicable.

QUESTION
NUMBER

rise to NZ exports. Additionally, Japan's yen depreciation to record lows impacted the revenue of kiwifruit growers ^{as} with Michael ^{Trunks} ~~Beck~~, the CEO of Zeeho, saying that "Green kiwifruit is heading into the sunset... it is no longer a very profitable".

As costs of production for both dairy and kiwifruit are rising, and for these industries are increasingly facing challenges on the global stage, the need for diversification ^{and innovation} in terms of markets, ~~new~~ products, and the production process is more necessary than ever. For instance, the A2 variety of milk is able to charge a higher price due to its perceived health benefits/ accommodation to lactose intolerance. Also, there have been innovations in terms of exporting kiwifruit such as barcoded labelling - which acts against the 8387 illegal hectares of kiwifruit in China - and with controlled atmospheric or (CA) storage so the kiwifruit can be stored for longer before being shipped off, ~~leading~~ to less losses ^{of kiwifruit}, more convenience for shipping, and thus higher profits. Clearly, both the kiwifruit and dairy industries need to continue differentiating their goods and investing in R&D so that NZ as these exports can remain resilient and remain sustainable for the future to come, allowing NZ to maintain its clean image as a large exporter of high quality agricultural and horticultural products.

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