

New Zealand Honey Strategy
2024-2030

Thriving Together

Futureproofing New Zealand Apiculture



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Foreword

Thriving Together: Futureproofing the New Zealand Apiculture Sector has been developed from a collaboration of all interests within the sector including representative bodies, honey exporters, commercial beekeepers, and other industry stakeholders. It is driven by a shared belief that the industry is stronger together. The strategy outlines what needs to be done to ensure New Zealand apiculture, as a whole, can thrive and grow into the future.

The strategy project was enabled by funding from the government's Sustainable Food and Fibre Futures (SFFF) Fund and supported by industry co-funding. It has been informed by a systemic analysis of the opportunities and risks facing the sector, including global honey market forecasts and the voices of sector participants throughout New Zealand and across the supply chain.

The project was initiated by Apiculture New Zealand in response to a clear need for the sector to generate a pathway forward for growth and prosperity. The goal was to understand the challenges and opportunities that exist and the changes needed for the sector as a whole to thrive and grow.

This included recognising the importance of a united sector empowered to deliver, building a sustainable and equitable funding model to enable reinvestment into the sector, delivering on our export market consumer needs and New Zealand's differentiating reputation for highest-quality honey, leading social good and environmental practices, and strengthening engagement with Māori to enable our major honey export earner, mānuka, to be recognised and protected as a taonga species unique to New Zealand.

The industry believes the New Zealand honey sector can more than double in value from where it is today to be a greater than \$1 billion sector by 2030, with mānuka honey being the primary driver of value creation for at least the next 10 years. The strategy centres around three key pillars: Sustainability, Quality-Led and Consumer Focus, and sets out the enablers and priority workstreams needed to deliver success.

The strategy recognises there is a strong case for a new strategic governance structure incorporating the interests of all industry participants, including the Mānuka Charitable Trust as 'kaitiaki' (the national guardian) for mānuka as a taonga species and also for the mānuka honey story, to oversee and deliver on the recommended actions. Determining a new structure represents the next critical step on that journey.

This strategy brings together the long-term aspirations for the sector with current priorities and new areas to collectively explore and develop together. If achieved, this strategy will unlock the potential of the New Zealand honey sector and, based on collaboration and trust, lay a solid foundation for a sustainable and prosperous future.



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Introduction

Thriving Together: Futureproofing the New Zealand Apiculture Sector sets out the collective ambition for the apiculture sector and identifies the steps needed to deliver a prosperous, united and sustainable sector into the future.

The total global market for honey is forecast to grow to more than NZ\$20 billion (US\$13 billion) by 2030, with the mānuka honey category forecast to nearly double to NZ\$1.0 billion. If New Zealand is to maximise this opportunity by growing exports to meet this demand, and grow our global market share, all those participating in the honey sector will need to work together.

This strategy outlines the steps needed to transform the New Zealand honey sector so it can deliver NZ\$1 billion in earnings by 2030.

Vision

New Zealand recognised by consumers around the world as the global leader in highest-quality honey and the only credible source of mānuka honey.

The strategy outlines an approach to bringing the industry together to drive performance and positive impact. With the support of the Mānuka Charitable Trust, established in 2019, Māori and industry will work in partnership to protect our mānuka taonga globally, the precious gift that makes New Zealand apiculture unique and presents the opportunity to develop enduring value for Aotearoa New Zealand for generations to come. Of the top 10 global honey exporters, New Zealand generates the highest export revenue from the lowest export volume because of the attributes associated with mānuka. Mānuka honey accounts for 82% of all New Zealand's honey export revenue and in 2022 was responsible for 76% of all New Zealand's apiculture sector income.

Building a strategy focused on our primary export earner will enable the whole sector, including those producing other New Zealand honeys, to thrive with a focus on quality and supply aligned with market and consumer demands. This can be achieved by delivering an industry body empowered to act, and a sustainable funding model that can reinvest to deliver innovation and lift productivity and prosperity for all.

Consumers around the world revere and seek out mānuka honey for its many health benefits and reputation for premium quality, which has led to substantial growth in the industry over last two decades. However, the sector's focus on production rather than meeting global market and consumer demands, and its race to compete with each other purely on price, puts this at risk.

To ensure long-term and sustainable growth we need to ensure supply and demand are balanced. To be successful, New Zealand needs to be producing honey that meets and exceeds global consumer expectations with a differentiation on quality, sustainability, social and ethical attributes. The export sector needs to focus on building value for all through category growth activity and increasing consumer awareness by delivering on the promise of New Zealand producing the highest-quality honey and recognised as the only credible source of mānuka honey.

The whole New Zealand apiculture sector is aligned to ensure that caring for the environment is at the forefront of business practices and that the risks of climate change and its impact on bee welfare and our communities are collectively understood, mitigated and managed in a transparent way. It is also committed to develop new strategies to more effectively manage existing bee diseases and be set up well to respond rapidly in the event of new biosecurity incursions into New Zealand.

2030 Goal

To double NZ honey export value, increase consumer engagement with mānuka honey, and New Zealand's honey reputation* by 2030.

**to be measured following baseline assessment*

A successful, consumer-led export market will lead to profitable, resilient and sustainable businesses throughout the New Zealand honey supply chain. This can be achieved by creating a platform that enables the sector to work together to capture and grow opportunities, build value through a collective focus on highest quality, and tell our unique mānuka honey story in an authentic and compelling way.

Pillars

This strategy comprises three pillars for success: Sustainability, Quality-Led and Consumer Focus, each comprising a series of specific strategic enablers and priority workstreams to deliver on our Vision.



1. Sustainability

The industry aims to grow its export value to ensure all participants in the value chain, including honey producers and brand owners, can reinvest in their businesses to drive growth, productivity and profitability. Achieving growth and success requires industry alignment around common goals, priorities and a strong vision for the future. Alignment will in turn enable the sector to access external resources, such as government funding through matched industry funds, for critical research and to agree on a long-term, self-sustaining and equitable funding model to reinvest for sector and New Zealand benefit.

Apiculture is reliant on the natural environment. All participants recognise, understand and address the risks that climate change poses for our businesses and performance. Climate change will have wide-ranging impacts on our sector, including impacts on bee welfare, foraging patterns and increased adverse weather events. Working together to understand these impacts and develop comprehensive risk management plans and tools to decarbonise will be essential. The sector also has a responsibility to care for and enhance the unique environment, flora and fauna that makes New Zealand, and our honeys, so special.



2. Quality-Led

The sector aims to enhance the trust placed in New Zealand honey exporters by delivering the highest-quality, efficacious honey products and building on our success to date. The New Zealand apiculture sector is the envy of the world in that regard and must now passionately protect and strengthen that position. This will only be achieved through the application of appropriate standards and regulation and adoption of best practice across the supply chain to work towards building mandatory product quality assurance into every level of the sector, from hive to consumer.



3. Customer Focus

Growing the sector's value will only happen if consumers' wants and needs are responded to. New Zealand honey needs to be purposefully differentiated from competitors' by building a compelling mānuka origin story based on mātauranga Māori, quality and efficacy, and subsequent stories that capture the unique attributes of other New Zealand honeys and its virtuous beekeeping model. The attributes that discerning consumers of premium food products demand must also be delivered on, including the highest quality and food safety, evidence-based environmental and sustainability measures, and exemplar standards for ethical, social and animal welfare practices.

Strategic Framework

Vision	New Zealand recognised by consumers around the world as a global leader in highest quality honey and the only credible source of mānuka honey.			
Goal	To double NZ honey export value, increase consumer engagement with mānuka honey, and New Zealand’s honey reputation* by 2030.			
Pillars	Sustainability	Quality-Led		Customer Focus
Enablers	Strong Industry Voice	Sustainable Reinvestment Model	Mandatory Regulatory Framework	A Unique and Differentiating New Zealand Honey story

**To be measured following baseline assessment*



Situational context for New Zealand Apiculture

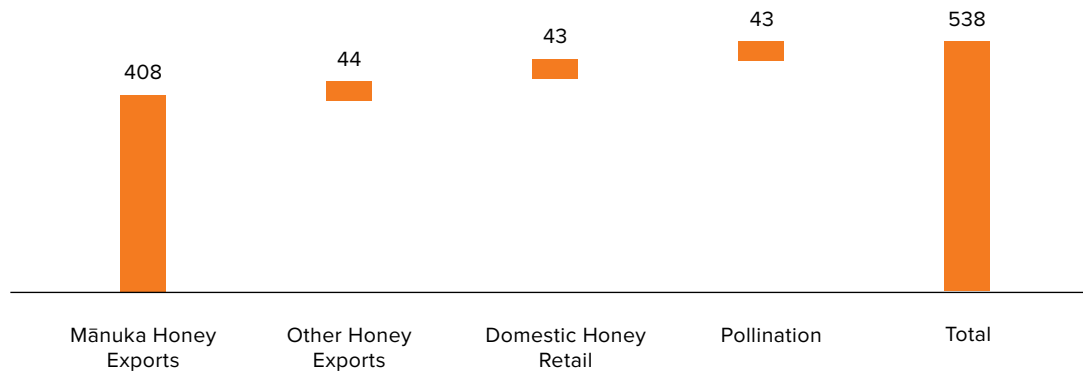
New Zealand apiculture is unique. As a sector, it exports high-value mānuka honey in a world dominated by low-value, high-volume commodity honey.

The New Zealand apiculture sector generated \$538m in income in 2022, of which 76% was mānuka honey exports. Other honey exports generated just \$44m (8%).

A further \$43m (8%) was generated through domestic retail sales, which included \$16.6m (3%) of mānuka honey sales. The combined export and domestic retail value of mānuka honey sales is therefore \$425m (79%) of all sector income. Pollination services generated \$43m (8%).

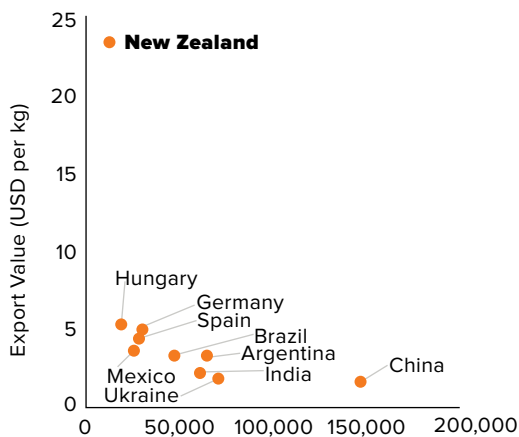
NZ apiculture sector income in 2022

\$ million



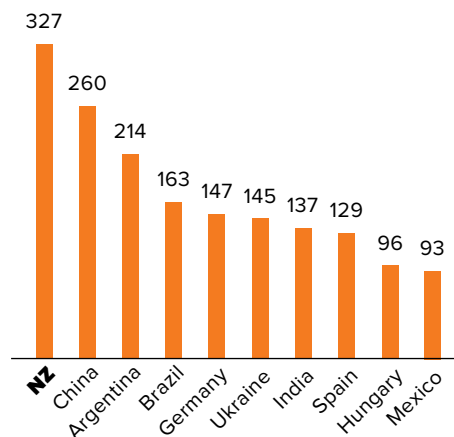
New Zealand is an outlier in the global honey market. New Zealand has both the lowest volume (13,800 tonnes) but the highest value per unit (US\$23/kg) of any of the top 10 global honey exporters, nearly five times that of its nearest rivals Hungary and Germany in 2021. The right-hand chart shows that New Zealand honey exports in 2021 were ahead of every other country, even China, which exported more than 10 times the volume.

Top 10 Global Honey Exporters in 2021



Top 10 Global Honey Exporters

(USDm in 2021)



Challenges emerge after rapid growth

New Zealand apiculture was relatively unremarkable prior to the development of mānuka honey, with around 300,000 hives nationally and export earnings of around NZ\$20m p.a. By 2008, hive numbers had grown to 340,000 with most of the new commercial hives targeting mānuka. Honey exports had grown to nearly NZ\$80m p.a. The acceleration of growth over the next 11 years built the industry to 920,000 hives and honey export receipts to NZ\$350m in 2019.

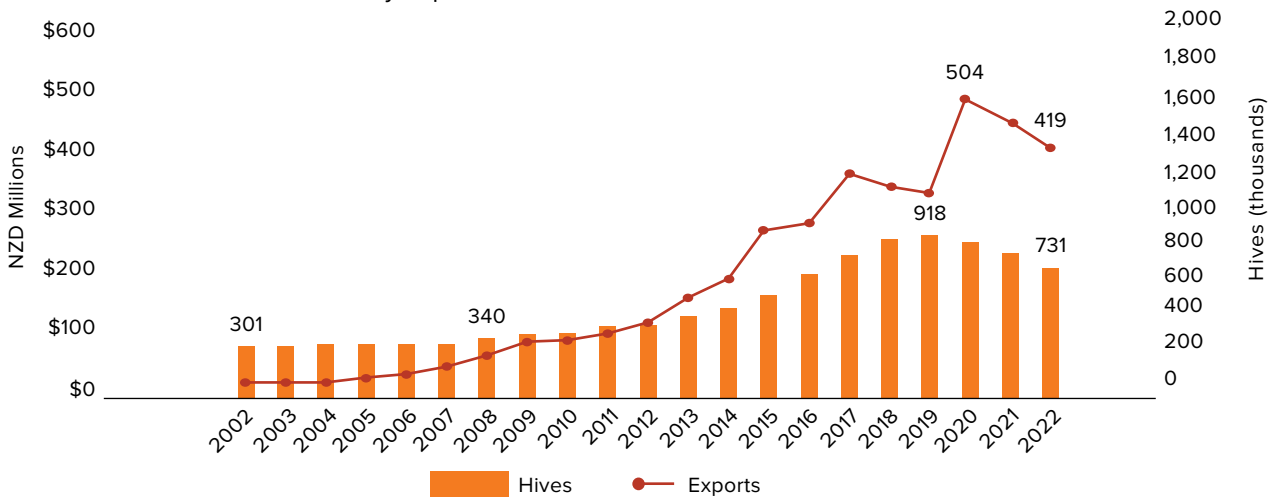
During this expansion, all stakeholders from landowners to beekeepers to marketers saw a transformation and value creation from honey that is totally unique to New Zealand.

However, the sector started facing challenges due to the unchecked growth in production. After 2017 the

rate of export growth did not keep up with the ongoing expansion of hives and honey production.

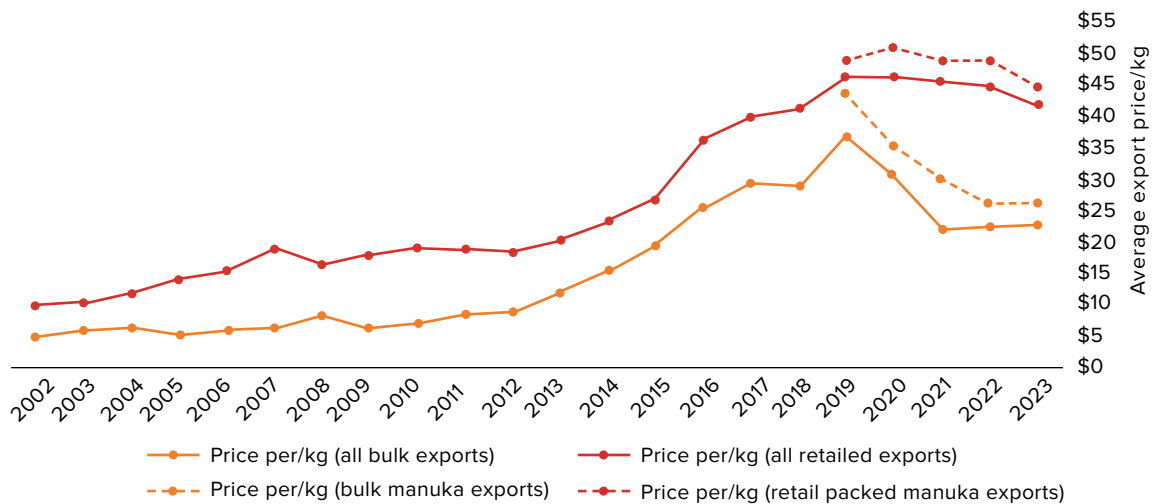
New Zealand honey exports surged in 2020 after several years of contraction as importing markets responded to fears of prolonged supply chain disruption in the immediate COVID-19 era. Since then, export revenue from New Zealand honey has fallen. This has occurred in an environment where many exporters have struggled to cope with unanticipated global trading challenges including ongoing pandemic restrictions, the closure of retail stores, a shift to e-commerce and inflationary pressure on consumer purchasing power.

New Zealand hives and honey exports 2002 - 2022



Meanwhile, successive years of excess production have led to an erosion in the value of honey, as distressed businesses have sought opportunities to reduce losses by discounting product for export—in both packed and bulk formats. Since 2020, average export prices for all New Zealand honeys, including mānuka, have fallen. The export price for retail-packed mānuka honey has dropped 12% from the peak at \$50.68/kg in 2020. A much sharper decline has been experienced for bulk mānuka exports—the average price in 2023 was 40% lower than in 2019.

New Zealand honey export price/kg 2002-2023



The financial losses experienced by some as a result of difficulties selling their honey and the fall in producer prices have been key contributors to the total number of hives contracting to 592,000 in 2023. For many businesses, the operational environment has become unsustainable; as a result, the sector has been in a steady correction mode since 2019.

Market fundamentals offer promise of recovery and return to export growth

Despite the current challenges, the New Zealand honey sector remains extremely well placed to rebound and further cement its unique advantage over other honey-exporting countries.

Projected global honey market growth shows the rewards on offer. The total market is expected to grow at a cumulative average growth rate (CAGR) of 6.4%, from \$13.6 billion in 2021 to \$21 billion in 2028, while the total market opportunity for mānuka honey is forecast to grow faster—at 7.8% to \$1.6 billion in 2028. Exports of New Zealand mānuka honey in 2023 reached \$335 million. This suggests the market growth opportunity for New Zealand is significant.

The anticipated growth is based on global consumers continuing to turn to natural health and wellness products, and honey specifically, to help build immunity and for use as a natural sweetener.

As with other New Zealand premium-quality products, there remains even higher growth potential for products with sustainable production. The forecast market for mānuka honey with additional organic or sustainable attributes is expected to grow fastest (CAGR 8.3%).

This is supported by New Zealand Trade and Enterprise (NZTE) in-market consumer research. Taste and quality remain the critical attributes for New Zealand food and beverage success in overseas markets, but sustainability is starting to present as an enabler to sales in high-value markets. The research in 2023 has shown overall rise in importance attributed to a product having sustainability at the forefront of its industry. For honey, 'bees are treated well' is top of mind for consumers focused on sustainability. Providing evidence of New Zealand's commitment to bee health and welfare will provide further access to high-paying global consumers.

Strategy enablers

Strong industry voice

Background and status

The apiculture sector is not united at present—the strategy addresses this by proposing a strengthened industry voice. Historically disaggregated, the industry has to date never found cause to effect comprehensive alignment that incorporates all participants. As a result, leadership in the sector is generally acknowledged to be ad-hoc, not well structured, and less effective than it should be.

The sector currently has a nominal peak body in Apiculture New Zealand, incepted in 2016, but membership is voluntary. While it represents all participants in the supply chain, some commercial beekeepers, exporters and brand owners have chosen to remain outside the umbrella organisation. Other representative organisations have, and still exist, but there are still many who are not members of or aligned to any representative organisation. While some organisations share members and even directors, that does not demonstrate unity for the sector.

A voluntary participation model means there is no ability for the industry to speak to, or for itself collectively. No one organisation has a mandate to speak and act on behalf of the industry and advance and resolve key issues that affect all stakeholders. In order for the industry to progress, adopting a model of industry representation that shifts from voluntary to compulsory membership will be essential. In the first instance it will allow everyone involved in the New Zealand apiculture supply chain to have the information and the support to both contribute to the goal of growing the sector's export value outlined in this strategy, and benefit from the gains it will deliver.

In addition to the normal representative functions undertaken, the role of an empowered peak body will include securing sources of funding to ensure this strategic plan can be acted on, maintain effective communications with all participants on its development and progress, and engage with government and wider stakeholders.

With an ability to communicate with all of industry, a peak body can also take a lead on providing quality, timely and insightful industry information to better assist collective decision making. This will enable the sector to take ownership of its own data, and have access to information on production, pricing, and market demand and consumer behaviours. Currently, the apiculture sector information systems are fragmented and incomplete and are not being used to their potential.

A well-constituted peak body has sufficient mandate to then deal with key policy development and significant decisions the sector needs to discuss and take action on. For example, understanding the carbon footprint for New Zealand's honey production and what effective measures may be taken to decarbonise, develop climate risk mitigation and management plans, biodiversity and environmental improvement metrics and targets, quality assurance frameworks, and establish industry minimum standards for ethical, social, environmental, employment practices. This will ensure a focus on the welfare of people working in the sector, which includes access to skills and training development. Industry work already commenced on implementing a Bee Welfare code should be advanced together with strong best practice and procedures for pest management and biosecurity.

Industry-agreed priority actions

- Establish a pathway for a newly formed, empowered industry body that has the ability and mandate to deliver on the strategy and communicate with stakeholders.
- Seek cooperation among industry participants to enable a transition to that mandated industry body. Cooperating industry participants should start setting workstreams to deliver on this strategy and ensure it there is appropriate capability and funding to do so.
- Once established, the peak body should take ownership of the industry's data and invest in transparent and expanded industry information systems that are needed to deliver on the strategy.
- The peak body needs to start developing industry responses to the most challenging issues for the sector where only collective action will be effective—including consideration of factors needed to ensure the production of honey remains a sustainable business.

Sustainable Reinvestment Model

Background and status

Industry funding has been, and continues to be, a major problem primarily due to its fragmented structure, voluntary contribution model and lack of clarity and alignment on its strategic priorities. The sector lost its commodity levy in 2002 and was unsuccessful in 2019 when it sought support for a new levy from its participants.

Other attempts have been made to develop a framework for industry funding. A Horticulture Export Authority-type model for mānuka honey was proposed in 2009. The primary purpose was to provide an effective standards framework, but the model itself allows for the collection of levies in order to provide funding for industry activities including research, gathering statistical information for the sector to make informed decisions, and representation. The proposal was not advanced due to a lack of shared commitment at that time.

The HEA remains a successful tool for managing horticulture exports across 11 sectors that have voluntary membership. Each product group prepares a strategy, specifying the product group's vision for the sector and rules for exporting to achieve the sector's goals. HEA then manages an export licensing system to assist in executing the strategy. Participating exporters are thus compelled to align themselves with the wider goals of the sector. Such an approach would

align the entire sector towards achieving this strategy.

Without internal funds, the apiculture sector has no leverage in seeking public monies. In a 2023 update on MPI's roadmap to accelerate New Zealand's food and fibre economic potential, apiculture projects were reported to have been funded \$1.8m out of a total \$559.7m awarded to projects for the entire primary sector (less than 1%).

The sector needs to develop a funding mechanism to pay for apiculture industry good activities with outcomes that will benefit all participants. This strategy presents a plan with an objective of the industry becoming financially sustainable and independent. However, the sector will need government to support this process, which will likely require legislative changes. The set-up costs will exceed the capacity of the current voluntary funding model.

One of the priority areas for continued funding is the long-term programme to seek protection for the term mānuka honey, recognising the unique and distinctive connection to Aotearoa New Zealand and cultural importance to Māori. The goal of exclusive protection for mānuka honey is key to realising the full potential of this product, ensuring industry sustainability as well as upholding the rights of Aotearoa New Zealand to manage this taonga species on our own terms.

Industry-agreed priority actions

- Seek government assistance, including industry co-funding support, for the implementation of a Horticulture Export Authority-type model.
- The peak body invests in the work required to bring mānuka honey into an HEA-type model.
- The industry peak body will establish a funding model to enable the development of an innovation and R&D investment framework with priorities to guide reinvestment into areas that grow the sector's profitability and resilience.
- Maintain the long-term objective to secure protection for the term mānuka honey, recognising the distinctive connection to Aotearoa New Zealand and cultural importance to Māori.

Mandatory Regulatory Framework

Background and status

To date, the government has taken responsibility for ensuring apiculture sector activities meet the regulated expectations of export markets for bee products imported from New Zealand. This has created a set of minimum standards applied to honey for the purpose of market access. Within the productive domain, the government has facilitated the industry's management of American foulbrood (AFB) with a regulated pest management plan (PMP). These interventions have made it viable for the industry to operate and trade.

These interventions have made it viable for the industry to operate and trade but have predominantly been treated within the sector as matters of compliance rather than enablers of raising the level of sector reputation and prosperity.

This minimum regulatory framework now falls short of the support the industry needs from government if it is to reach the strategy goal of doubling honey export value by 2030.

Honey product quality standards

The General Export Requirements for Bee Products (GREX) requires all honey exported as mānuka to conform to a defined standard. For export markets requiring official assurances, MPI oversees a process for verifying the supporting evidence prior to an Export Certificate being issued. However, for markets not requiring official assurances (e.g., USA and Canada) there are no steps to verify compliance of exported product on a consignment basis.

MPI negotiates Overseas Market Access Requirements (OMARs) with some trading partners. These are enforced via the Export Certification process, but they do not cover all the regulatory requirements for selling products in each territory. Standards need to continually be modernised to keep pace with changing international consumers, new science, and help protect New Zealand's reputation.

This presents a risk to New Zealand's reputation in the event that testing in-market shows imported product to be non-conforming. With government support, the mānuka honey sector could adopt a Horticulture Export Authority-type model to address the gaps MPI is unable to fill and provide. These include visibility

on exports; ability to define enforceable quality standards to exports based on existing MPI standards; and a higher level of confidence in exports being fully compliant with importing country requirements.

The regulatory definition for mānuka honey, described in the GREX, is only applicable to exported products. This leaves the New Zealand domestic market unregulated and consumers susceptible to poor-quality products and misleading product information.

We need assistance from government to identify the appropriate legislative route that can lead to establishment and enforcement of a domestic standard providing an equivalent level of consumer protection as the GREX.

Biosecurity

Biosecurity is arguably the greatest threat to the sector. We need more effective management of the pests and diseases already present, and we need to be better prepared to respond to new incursions. Poor management of pests and diseases is also an animal welfare issue.

The Biosecurity Act enables the establishment of pest management plans, and the industry currently has one in place for AFB. However, another pest, varroa, has become at least as significant. According to the Manaaki Whenua Landcare Research-conducted New Zealand Colony Loss Survey for 2022, AFB accounted for 1.1% of winter colony losses, compared with varroa being the suspected cause of 47.3%. As well as the direct cost of hive losses, varroa infestation can weaken hive strength, reducing productivity.

The growing economic impact of varroa suggests the sector needs to take a more structured approach to managing it. The case for introducing a Varroa PMP is now compelling. Such a plan could make inspection and reporting of varroa mandatory; make training on varroa management compulsory for beekeepers; make it unlawful for beekeepers to not use an approved varroa management regime in their hives; and enable funding for research to optimise management controls and develop policy settings to prevent the spread of varroa between beekeeping operations.



Funds from a new PMP could also be set aside to enable the development of new incursion response plans, including building reserves to manage biosecurity readiness and response outcomes in conjunction with government via the well-established Government Industry Agreement (GIA) model, along with the development of proactive biosecurity preparedness plans.

Extension of the PMP provisions would enable more effective pest and disease management to be enforced, resulting in improved bee welfare, improved sector productivity, preparedness for new incursions, and funding to support all associated activities.

Industry-agreed priority actions

- The sector supports quality standards based on current MPI export quality standards. The regulatory requirements for selling honey in all export markets need to be within the scope of export surveillance.
- Seek guidance from government on the best legislative pathway to achieve protection for domestic consumers.
- Assess the current biosecurity framework and identify gaps and with government support, recommend changes to improve risk management and emergency response, including the introduction of a Government Industry Agreement (GIA).
- Evolve the current PMP framework to cover varroa reporting and work towards mandatory management protocols.

A Unique and Differentiating New Zealand Honey Story

Background and status

Mānuka honey is special as the only New Zealand primary industry of scale where the product is uniquely from this land and where science and mātauranga Māori have been instrumental in defining what is a high-value product category. However, the advantages that come with a successful mānuka honey industry are at risk from the supply of Australian and other market product adopting the term mānuka to honey exports. The expropriation of the name 'mānuka honey' to product that is not grown in Aotearoa New Zealand impacts the mana and mauri of the taonga species and its derivatives. It is also misleading to consumers seeking the experience and benefits of authentic mānuka honey. Science clearly shows that mānuka honey from New Zealand has a distinct chemical composition and organoleptic profile not seen in Australian honey and mānuka (*Leptospermum scoparium*) trees are genetically distinct from Australian species.

A national mānuka honey story developed in partnership with the Mānuka Charitable Trust needs to be developed to assist consumers to understand the distinctiveness of our mānuka honey. This story will be anchored in mātauranga Māori and clarify for Aotearoa New Zealand and consumers in key markets that mānuka is not only defined by botanists and taxonomy as *Leptospermum scoparium* but equally as a taonga species, and as such, endemic only to Aotearoa New Zealand.

The Mānuka Charitable Trust are recognised as 'kaitiaki' (the national guardian) for the mānuka honey story and the term mānuka honey. The strategy brings together and strengthens an enduring partnership with the Trust, enabling it to exercise its role as kaitiaki.

The story lays the foundations to secure protection for the term with certification trademarks and advocate for a Geographic Indication (GI) for mānuka honey. Protection is built on confidence in the IP owner to competently enforce compliance and maintain the requisite consumer reputation associated with certification. Legally protecting mānuka honey would enable the industry to define how the term is expressed, and how a supporting story is presented in a cohesive and culturally appropriate way. Not having this in place presents the risk of exporters inadvertently undermining a collective industry position. Protecting mānuka will also set a precedent or pathway for other indigenous New Zealand honeys.

The sector cannot rest on developing the story and protecting it. A short-term priority will be to invest in better understanding mānuka honey's impact in markets and measuring its success in building consumer awareness and interest to justify ongoing investment.

Industry-agreed priority actions

- Develop a mātauranga Māori manuka story in partnership with the Mānuka Charitable Trust.
- Bring together and strengthen the enduring partnership with the Mānuka Charitable Trust.
- Continue making the case to government to amend the Geographical Indications (Wines and Spirits) Registration Act 2006 to allow recognition of mānuka honey.
- Seek government funding, or reallocation of existing funding, to measure baseline consumer sentiment, purchase drivers and other indications of consumer interest in mānuka honey, in key markets.

Monitoring and evaluating progress

It is critical that initiatives undertaken to implement the strategy's recommended actions are regularly assessed. The industry intends to work collaboratively with government to confirm key performance indicators to track progress.

New Zealand honey strategy summary

Vision	New Zealand recognised by consumers around the world as a global leader in highest quality honey and the only credible source of mānuka honey.		
Goal	To double NZ honey export value, increase consumer engagement with mānuka honey, and New Zealand's honey reputation* by 2030.		
Pillars	Sustainability	Quality-Led	Customer Focus
Enablers	Strong Industry Voice	Sustainable Reinvestment Model	Mandatory Regulatory Framework
Y1-2 Priorities	<ul style="list-style-type: none"> Establish an aligned and empowered industry body with clear KPIs and workstreams to deliver on the strategy. Transparent industry data and information systems to enable the value chain to deliver on consumer needs and demands. Take the lead on developing policy to tackle difficult sector challenges, including mitigating climate change, setting standards for standards for ethical social, environmental, employment practices, and fully implementing the Bee Welfare code. 	<ul style="list-style-type: none"> The industry peak body will establish a funding model to enable the development of an innovation and R&D investment framework with priorities to guide reinvestment into areas that grow the sector's profitability and resilience. Seek government assistance backed by industry support for the implementation of a mandatory funding model. The peak body invests in the work required to bring mānuka honey into a mandatory funding model. Bulk export levy model to ensure quality and value is retained in New Zealand. 	<ul style="list-style-type: none"> Agree on export quality standards, and with the support of government, establish a mechanism to enforce these standards. Seek guidance from government on the best legislative pathway to achieve protection and consistent regulatory standards for both export and domestic consumers. Revise the current biosecurity framework and with government support, recommend any changes to improve risk management and emergency response. Evolve the current PMP framework to consider the introduction of varroa reporting and mandatory management protocols.
A Unique and Differentiating New Zealand Honey story <ul style="list-style-type: none"> Deliver a compelling Mānuka origin story grounded in Mātauranga Māori. Lobby the government to amend the Geographical Indications (Wines and Spirits) Registration Act 2006 to allow recognition of mānuka honey. Measure baseline consumer sentiment (NPS), purchase drivers and other indications of consumer interest in mānuka honey, in key markets. Develop industry case studies highlighting the sustainability and best practice for bees and the environment of the NZ honey industry. Sharing the exacting quality standards of the NZ honey industry including traceability. 			

*To be measured following baseline assessment*to review following baseline assessment



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