

Nelson Tasman Food & Beverage

NELSON
REGIONAL
DEVELOPMENT
AGENCY

Our Economy at a Glance

Unless otherwise stated, all figures throughout this document are from the Nelson-Tasman Regional Economic Briefing, the Nelson Tasman Productivity Gap and Infometrics.

Size of economy =

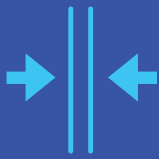
\$6,159m

GDP per filled job =

\$105,070

Productivity gap =

\$1.63bn



Closing the productivity gap =

123 years

at current trajectories



Population =

113,200



Mean earnings =

\$60,048



Proportion of small businesses (<20 employees) =

96.3%



Inward migration = positive net 300 people (plus 90 natural increase)



Intellectual Capital (Knowledge Intensive Employment) = 15,538 jobs = 26.5% of total jobs

Strong opportunity for growth:

Sectors with high regional competitive advantage



Blue Economy



Forestry



Horticulture



Science & Tech



Tourism

Nelson-Tasman Regional Economic Briefing February 2023 update, People and Places, February 2023

Nelson-Tasman Productivity Gap 2022 Supplementary Update, People and Places, February 2023

Nelson Tasman Regional Economic Profile, Infometrics, January 2023

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A note on Nelson Tasman

As a region, Nelson Tasman includes two unitary areas, whose economies are inherently connected and share many of the same aspirations. Areas like infrastructure provision, economic development, tourism and business confidence spans across both areas.

However, it is worth noting that there are some differences between the urban and rural communities.

NELSON OVERVIEW

Nelson is home to approximately 54,500 people, with a geographical area that includes Nelson City, Tāhunanui and Stoke. A small proportion of residents live in the surrounding rural areas.

Key stats:

GDP – \$3,234m

Business Units – 6,720

Average household income – \$92,433

Filled jobs – 30,886

TASMAN OVERVIEW

Tasman is home to approximately 58,700 people, with a urban and rural geographical area that includes Richmond, Motueka, Waimea, Golden Bay, Murchison and St Arnaud.

Key stats:

GDP – \$2,925

Business Units – 7,473

Average household income – \$101,596

Filled jobs – 27,732



Introduction

Food, Beverage and Wellness Products in Nelson Tasman

The growing, harvesting and manufacturing of Food, Beverage and Wellness products is a significant economic driver for Nelson Tasman, providing in 2022 \$588m of GDP, 8782 jobs and an extensive supply chain that supports many of our service businesses.

This document does not include the food components of the very large Blue Economy sector, which is profiled separately.

Our region has a uniquely diverse food & beverage industry, with over 150 businesses in the region delivering in this space

As noted by MPI, New Zealand's Food and Fibre Sector is intrinsic to our country's economic success. Economic, societal and environmental prosperity is achievable – sector growth is fundamental to New Zealand's success in tomorrow's world.



Contribution to the Nelson Tasman Economy

The Nelson Tasman Regeneration Plan

The Nelson Tasman Regeneration Plan recognises Food Beverage and Wellness Products as an economic driver for the region. Our favourable growing conditions make us a significant horticultural region with an extended value chain delivering a range of high-value food and beverage products. Growing and processing of horticultural products represented almost 4,000 jobs in 2022, more per capita than any other region. There are opportunities to further invest in research, including improving growing efficiency and developing new high value products and ingredients for nutraceutical and wellness applications.

Local Plant and Food Research assets and capabilities, a Food Factory, and a burgeoning cluster of companies / processors exploring nutrition opportunities all support the strong platform we have to build from.

From gourmet cheeses, chocolate, and healthy snack foods to craft beers, cider and speciality gins, to small-scale producers of international foods, and developers of nutraceuticals and functional foods, we have a region rich in options and opportunities.

The Nelson Tasman location quotient

analysis commissioned by NRDA identified food and beverage as a key area of competitive advantage for the region and this indicates a strong opportunity for growth as recognised in the [Briefing for Ministers](#).

The sector is also well aligned to longer-term structural shifts in global demand towards food and fibre products which can be produced with relatively more sustainable environmental footprints.

Significant Employment

The Food, Beverage and Wellness Products sector as defined by NRDA is composed of a large number of sub-industries which are identified in Appendix A.

The growing of horticultural crops and processing them into high-value products represented almost 4,000 jobs in Nelson-Tasman in 2022, which was 6.5% of all employment, compared to 2.5% nationally. A 2018 report by MBIE found that the wider food chain in Nelson Tasman directly employed 30% of the working population.

The contribution of the broader sector (as defined in Appendix A) to the regional economy is illustrated by some key statistics:

- GDP 2022 \$588m representing 10% of total Nelson Tasman GDP
- Industry GDP grew by 3.2% in 2022 compared to 5.6% for total Nelson Tasman GDP
- Regional competitive advantages are in
- Employment 2022 was 8,872 filled jobs, representing 15% of the regional total
- Business units in 2022 numbered 1,878, representing 13% of the regional total

Our Businesses

Ranging from primary producers and artisans through to manufacturers, processors and high-tech extract businesses, Nelson Tasman has many companies engaged in providing high quality food, beverage and wellness products.

Primary Production, Value Add and Wellness

Nelson Tasman produces a broad range of primary produce

which has enabled the development of a diverse value-add sector.

Hectares under cultivation by land use type:

Beef - 27,593

Dairy - 30,234

Other livestock - 1,932

Sheep - 27,388

Grain - 2,218

Horticultural - 6,978

Fruit and vegetables include Grapes, Kiwifruit, Berry Fruit, Apples and Pears, Stone Fruit, Citrus Fruit, Olives, Other Fruit and Tree Nuts and Other Grain Growing.

Livestock farming includes Sheep Farming (Specialised), Beef Cattle Farming (Specialised), Beef Cattle Feedlots (Specialised), Sheep-Beef Cattle Farming, Dairy Cattle Farming, Poultry Farming (Meat), Poultry Farming (Eggs), Deer Farming, Pig Farming, Beekeeping and Other Livestock Farming n.e.c.

Nelson Tasman's value added food and beverage products are extremely diverse, including processed fruit and vegetables, fast-moving consumer goods, artisan offerings to specialist functional foods.

Product types include:

- Cheese, Ice cream and other dairy foods
- Cereal-based and baked goods
- Confectionery and snack foods, including artisan chocolate
- Fruit-based and soft drinks
- Beer, cider, wine and spirits
- Cured meats and smallgoods
- Nut butters and fruit spreads

Functional foods range from beverages and cacao drinks infused with beneficial mushroom extracts, to fermented foods like miso and sauerkraut.

A growing global and national market

New Zealand Trade and Enterprise cites a US\$66 billion (NZ\$108b) global market for physical, mental and inner wellbeing nutrition which is growing at 6% per year, and the US\$50b medical nutrition market which is growing at a 5% annual pace.

Closer to home, a national survey conducted in May 2022, conducted last May 2022, found that The IRI survey found that 80 per cent of New Zealanders are actively seeking some form of health benefit by consuming specific foods and beverages or taking vitamin supplements or OTC medications.

The survey also found that 40 per cent of New Zealanders believe food can be as powerful as medicine: the nation is developing a greater connection with food including a desire to understand provenance.

Nelson Tasman products feature strongly

Natural Health Products NZ is the industry body for New Zealand's growing natural health and complementary products sector, which contributes \$2.3bn to the economy each year. Key export products identified by the body include antibacterial manuka honey, bioactives from New Zealand grown boysenberries to assist with lung health, mussel extract powder, plant and marine oils, kiwifruit-based specialised ingredients, berry fruit powders and concentrates, natural honey products, deer velvet, skincare, botanical and dairy products. All of these are produced in Nelson Tasman.



Exports

New Zealand's temperate climate, fertile soil and pristine ocean has enabled us to be a world leader in food production and one of the world's top food exporters. We provide premium food and beverage products to millions of people in over 120 countries.

New Zealand exports more dairy products, lamb and venison than any other country, and is among the leading exporters of beef, kiwifruit, apples and seafood. Natural production advantages and the expertise of local producers and businesses combine to offer significant potential for investors.

New Zealand's global exports of food and beverage were valued at \$31.2bn in 2021 and New Zealand ranks third out of 113 countries for food safety, nutritional standards and foods safety net programmes.

Exports of food and beverage products from Nelson Tasman are estimated at \$797m in 2022, or 52% of the region's \$1.5bn total[1],

Products include:

- Apples, pears & other fruit
- Fresh kiwifruit & berries
- Beverages, spirits & vinegar
- Other food products
- Milk and cream; concentrated/sweetened
- Beef
- Sheep & goat meat
- Edible preparations, misc.
- Vegetables, roots & tubers
- Honey, eggs & other animal products
- Milk butter, fats & oils
- Cheese & curd
- Preparations of cereals/flour/starch/milk
- Dairy products NEI
- Other meats

Sector Challenges and Opportunities

A Key Sector for Economic Development

Nelson-Tasman's favourable growing conditions mean that it is a key grower of horticultural crops including apples, pears, kiwifruit, hops, olives, grapes, and a range of vegetables. These products are processed into a range of high-value food and beverage products (eg. olive oils, craft beers). This horticultural focus aligns to the rising prominence of ethical and sustainability concerns among consumers, which are expected to favour growth in plant-based food items, compared to animal proteins. Seasonal labour constraints can be mitigated with investment into automation. There are also opportunities for the sector to further invest in research, including ways of improving growing efficiency and designing new high-value food and beverage products.

Barriers to Growth in Natural Health Products

A 2019 survey by Natural Health Products identified the following barriers:

- New Zealand Government Regulations
- Increased Competition
- International Government Regulations
- Increased Operating Costs
- Costs of getting product to market

National Food Security and Resilience

A 2020 policy brief by Manaaki Whenua Landcare Research suggested that New Zealand should give stronger consideration to national food security. The policy brief was written in the context of disruptions from Covid-19 and the message has been strengthened by the effects of the war in Ukraine and the extreme weather events in New Zealand over recent times, all of which have disrupted some food supplies and/or caused significant cost increases.

The report stated that feeding Kiwis was overlooked in the pressure to produce premium products for the lucrative export market, as New Zealand typically imports any shortfall. However that may be more difficult in the future and the slow changes to food production caused by drought and wet weather disruption, or by the loss of highly productive land to housing developments represent the biggest threats to our food security. At-risk commodities which are not easily substitutable are identified as sugar, wheat, maize, rice, and coffee.

The policy brief proposed several actions that could help the country build resilience into our food systems, such as greater domestic production of at-risk commodities (e.g.growing sugar beet) and increasing urban food production. Reducing food waste was estimated to provide \$4.5 of social value for every \$1 invested. And protection of the country's highly-productive land is high on the list – making up just 15% of total NZ land.

Sector Challenges and Opportunities

Regulation, Capability and Capacity in Value Add

In preparation for development of the Food and Beverage Industry Transformation Plan, the New Zealand Food Innovation Network teams joined MPI to workshop some of the challenges, opportunities, restraints the food and beverage industry faces.

One of the biggest opportunities identified was to capitalise on our strong reputation for high quality ingredients and focus more on value-add premium products rather than straight commodity exports, without compromising goals for sustainability, ethical food production, animal welfare and strengthening our social licence to operate.

Significant barriers to such development are lack of collaboration, transportation, investment, and onshore ownership. New Zealand's high cost of manufacturing starts with the land then moving to labour, energy, compliance, cost of getting to the international markets. A lack of manufacturing equipment and infrastructure is a particular problem, in that for many products and processes the necessary equipment does not exist in New Zealand outside the Food Innovation Network hubs.

A double edged sword is our strong industry compliance regulation, which contributes to our world-renowned high quality food safety outcomes, yet presents barriers to innovators in the form of high costs and complexity, for example in preparing sample production runs for market testing.

New Zealand Food Safety Strategy: Risks and Opportunities

The New Zealand Food Safety Strategy assessed global and domestic considerations and identified emerging risks and opportunities to focus on within the New Zealand food safety system. Key concerns were:

- Increasingly complex and globalised supply chains
- Sophisticated food fraud
- Technological developments present both opportunities and risks
- Increasing pressure on safety systems from climate change and changing consumer demand

Opportunities are explored further in the next section, Future Direction



Future Direction

Central government initiatives and policies are a significant factor in setting the future direction of Food, Beverage and Wellness Products across New Zealand. There are several such components in particular that will inform activity, and their goals represent opportunities for significant benefits to be realised for the sector, for Nelson-Tasman and for the country as a whole.

Ministry for Primary Industries: Fit for a Better World

Published in 2020 and updated in 2023 this document sets out a road map for building the industry back better post-Covid and cites the food and fibres sector as being at the forefront of our export-led recovery and a move to a regenerative economy. Actions are across the three pillars of

- Productivity: add \$44bn in export earnings by 2030
- Sustainability: reduce biogenic methane by 24%-47% by 2050
- Inclusiveness: employ 10% more Kiwis by 2030
-

Areas of action include:

- Capitalising on the high demand for high-end NZ food, beverage and nutraceutical products
- Staying abreast of evolving consumer preferences
- Front-footing market access and international trade responses

Food and Beverage Draft Industry

Transformation Plan highlights that the food and beverage sector is crucial, feeding our people and tens of millions of consumers globally. The wider food chain employs one in every five New Zealanders – and up to two in every five in the regions. And the sector is our primary economic driver, with exports worth \$42.3 billion in the year ended June 2022.

The ITP aims to enhance the sector's strengths, while maximising new opportunities, and responding to challenges. The ITP builds on Fit for a Better World and aims to transform the sector to being recognised as a global leader in environmental excellence, providing both traditional and emerging foods that are high-quality and nutrient-rich.

The ITP aims to achieve, through sector transformation, the following:

- Deliver more value for less output. thus lifting our productivity
- Underpin our economy
- Deliver a high-wage, low emissions future
- Limit our reliance on particular sectors or markets by creating a broader, more evolved export portfolio

Areas of action include:

- Orienting the sector towards consumers and the market, with enhanced government support
- Increasing investment in innovation and attracting capital for growth
- Building capability to innovate, commercialise, and improve productive capacity
- Ensure that regulatory settings enable food innovation

Future Direction

NZ Emissions Reduction Plan Agriculture Chapter

The NZ Emissions Reduction Plan identified the agricultural sector as not only being the source of half of New Zealand's greenhouse gas emissions but also as being highly exposed to the effects of climate change. Rainfall events and conversely, drought severity are both projected to increase across all regions.

In terms of emissions, agriculture creates about 91% of our biogenic methane emissions and while this gas is shorter lived than other greenhouse gases, its warming effect is 28 times greater than carbon dioxide.

The Emissions Reduction Plan highlights the combined risk/opportunity presented by international trade levers being used to enforce sustainability requirements on imported goods.

Key actions identified to realise the intentions of the reduction plan:

- Price agricultural emissions.
- Introduce an agricultural emissions pricing mechanism by 2025.
- Support early adopters of low-emissions practices.
- Accelerate mitigation technologies.
- Establish a new Centre for Climate Action on Agricultural Emissions to drive a step change in mitigation technology innovation and uptake on farms.
- Support producers to make changes.
- Fund tikanga-based programmes to support needs and aspirations of Māori.
- Introduce climate-focused extension and advisory services.

Business Voice: Reframing Food and Fibre Sector Growth Opportunities

"Growing the sector from \$48 billion to \$85 billion in exports by 2050 is possible, assuming sector growth of 2% annually" Lain Jager, Chair Te Puna Whakaaronui Thought Leaders

Te Puna Whakaaronui is New Zealand's independent Food and Fibre sector think tank, established as one of the actions under the Fit for a Better World road map. The group's document :WELL_NZ considers three drivers of change for New Zealand's food production systems: climate change, consumer needs, and rapidly developing technology.

Climate Change

Globally the focus on climate change is shifting to identifying opportunities for economic, social, individual and environmental wellbeing, as well as the potential for future growth. To this end, governments are making policy decisions to reshape their domestic and export food markets and commercial solutions are coming to market.

Changing Consumer Preferences

Peoples' food choices, and their willingness to pay more, are changing in favour of sustainable, ethical and healthier options: "buy local", foods that enhance mental and physical health; and those that are environmentally sustainable, or go further to be planet positive.

The Food Navigator, June 2020, survey found that 82% of respondents were willing to pay more for food products containing sustainably produced ingredients.

Future Direction

Technology

Immediate technologies that are key for the Sector to consider are identified as follows:

Alternative Protein Technologies

Alternative protein sources range from algae and insects to re-engineered legumes and a variety of meat substitutes including lab-grown meat. In 2021 US\$4.9 billion was invested, more capital than the previous three years combined, and with a year-on-year increase of over 58% year.

Personalised Nutrition

Work is under way around the world to use technology and biology to tailor nutrition for individuals. Stratified nutrition attempts to group individuals with shared characteristics and to deliver nutritional advice that is suited to each group; Personalised nutrition aims to deliver nutritional advice suited to each individual based on, predominantly, biological measures such as genetic characteristics; Precision nutrition combines an individual's genetic, environmental and lifestyle information to deliver advice suited to each individual.

Food-as-software (FaS)

This is still in its infancy but it essentially takes the software design methodology of continual design and iterative improvement and applies it to food, using the latest advancements in science and technology to make food production radically easier and faster.

MPI: Exploring Demand Opportunities in 2050

In April 2023 MPI published its first Long Term Insights Briefing for Government[1]. The Briefing explores how demographic change and global trends are influencing future global consumer preferences out to 2050 – what are core needs likely to be, how might preferences change, and where are future consumers likely to come from.

Issues and challenges with consumer-driven opportunities were identified as well as building blocks to capturing potential future consumer demand – noting that the global population is expected to increase from 8 billion now to 9.7 billion people by 2050 and that the world is expected to need 56% more food by then.

There was a specific acknowledgement of the need firstly to convene and facilitate collaboration across food, health, education, tourism and innovation sectors; and secondly to connect wider issues around domestic food, food system resilience and land and ocean use.



Appendices

Appendix A: Make Up of the Sector (ANZSIC06 Level 7 Industries)

A012200 Vegetable Growing (Under Cover)	C117300 Biscuit Manufacturing (Factory-based)
A012300 Vegetable Growing (Outdoors)	C117400 Bakery Product Manufacturing (Non-factory-based)
A013100 Grape Growing	C118200 Confectionery Manufacturing
A013200 Kiwifruit Growing	C119900 Other Food Products Manufacturing n.e.c. (includes food supplements)
A013300 Berry Fruit Growing	C121100 Soft Drink, Cordial and Syrup Manufacturing
A013400 Apple and Pear Growing	C121200 Beer Manufacturing
A013500 Stone Fruit Growing	C121300 Spirit Manufacturing
A013600 Citrus Fruit Growing	C121400 Wine and Other Alcoholic Beverage Manufacturing
A013700 Olive Growing	F360100 General Line Groceries Wholesaling
A013900 Other Fruit and Tree Nut Growing	F360200 Meat, Poultry and Smallgoods Wholesaling
A014100 Sheep Farming (Specialised)	F360300 Dairy Produce Wholesaling
A014200 Beef Cattle Farming (Specialised)	F360500 Fruit and Vegetable Wholesaling
A014400 Sheep-Beef Cattle Farming	F360600 Liquor and Tobacco Product Wholesaling
A014900 Other Grain Growing	F360900 Other Grocery Wholesaling
A016000 Dairy Cattle Farming	G412100 Fresh Meat, Fish and Poultry Retailing
A017100 Poultry Farming (Meat)	G412200 Fruit and Vegetable Retailing
A017200 Poultry Farming (Eggs)	G412300 Liquor Retailing
A018000 Deer Farming	G412900 Other Specialised Food Retailing
A019300 Beekeeping	H451100 Cafes and Restaurants
A019900 Other Livestock Farming n.e.c.	H451200 Takeaway Food Services
A052200 Shearing Services	H451300 Catering Services
A052900 Other Agriculture and Fishing Support Services	H452000 Pubs, Taverns and Bars
C111100 Meat Processing	H453000 Clubs (Hospitality)
C111300 Cured Meat and Smallgoods Manufacturing	
C113100 Milk and Cream Processing	
C113200 Ice Cream Manufacturing	
C113300 Cheese and Other Dairy Product Manufacturing	
C114000 Fruit and Vegetable Processing	
C115000 Oil and Fat Manufacturing	
C116200 Cereal, Pasta and Baking Mix Manufacturing	
C117100 Bread Manufacturing (Factory-based)	
C117200 Cake and Pastry Manufacturing (Factory-based)	

Appendices

Appendix B: Government and Industry Support Mechanisms

Callaghan Innovation is the New Zealand government's innovation agency. It provides support and funding for innovation and research and development. In Nelson Tasman, Callaghan's services are delivered to the local community through the Regional Business Partners programme, hosted by NRDA.

New Zealand Trade and Enterprise (NZTE) is the government's international business development agency. It supports exporters in accessing overseas markets, attracting foreign investment and enhancing New Zealand's business reputation internationally.

The Ministry for Primary Industries

Sustainable Food and Fibre Futures (SFFF) programme supports innovation in New Zealand's food and fibre sectors, by co-investing in industry development initiatives that make a positive and lasting difference. Funding is available for a range of projects – from smaller projects that cost less than \$100,000 to multi-million-dollar, multi-year programmes.

The MBIE Food and Beverage Information Project publishes comprehensive, data-driven reports on the current and evolving state of New Zealand's food and beverage sector. The reports describe key market trends, identify investment opportunities and profile major businesses.

Over 30 detailed reports, providing analysis, trends, and comparison include:

- Regional Growth Opportunities reports
- Emerging opportunities reports
- Market opportunities reports
- Plant-based proteins
- In-depth reports

The New Zealand Food Innovation Network provides food development facilities to help businesses develop, scale up, test and prove new products, trial new equipment and export. It provides training and access to expertise and networks.

Nelson Tasman has created its own open access facility called The Food Factory.

Plant and Food Research engages in scientific research and use of technology to help ensure a sustainable and resilient food supply for the future. Their work includes lower-resource production systems, reducing environmental harm, pest and disease control, food journey tracking systems to minimize food waste, utilization of byproducts/waste stream, and creating higher-value products and foods with enhanced nutritional value. Also in scope is work on urban food production, and all-season production.

The Ministry for Primary Industries

Economic Intelligence Unit produces six-monthly reports on the situation and outlook for primary industries.

United Fresh produces Fresh Facts provides a snapshot of the current horticultural export market in New Zealand across all categories from fruit to flowers. The report details markets, values, growth, hectares under cultivation by region, and provides useful links. United Fresh is an independent membership organisation which supports and promotes the fresh produce industry, working with the entire value chain, from seed producers, grower to consumer, providing leadership on pan-produce issues.

Appendices

Appendix C: Future Workforce

Between 2021 and 2040, the overall working-age population in Nelson Tasman is forecast to decline by approximately 13,500 individuals, while the Māori working-age population is forecast to increase by more than 2,000 individuals.

Ministry of Education figures for educational attainment in 2021 are as follows:

Education level	Nelson	Tasman	Total NZ
Starting school having attended ECE	99.6	97.7	96.8
NCEA Level 1 or above	90.2	87.5	87.3
NCEA Level 2 or above	80.2	77.4	78.7
NCEA Level 3 or higher	56.7	43.0	55.8
School leavers retained until at least age 17	81.9	77.4	81.4
School leavers enrolled in tertiary within 1 year of leaving	67.3	60.9	64.8

For the year to March 2021, the NEET rate (the percentage of potential employees aged 15-24 who are not in employment, education or training) in the region was 9% compared to 12.7% for average NZ

Reference Documents

- Te Tauihu Intergenerational Strategy
- Nelson Tasman Regeneration Plan 2021-2031
- Nelson Tasman Briefing for Ministers 2023
- Top of the South location quotient analysis, September 2021
- Nelson Tasman Blue Economy Sector Profile 2023
- MPI Fit for a Better World
- Nelson Tasman Regional Economic Briefing 2022 update, February 2023
- MBIE Regional Growth Outcomes in Employment in the New Zealand food and beverage industry
- Nelson Tasman Regional Economic Profile, Infometrics, September 2023
- StatsNZ Agricultural Production Statistics 2019 NZ Story
- NZTE Food and Beverage
- Natural Health Products Survey 2019
- Policy Briefing No.27 Rethinking New Zealand's food security in times of disruption, Siloman and Greenhalgh, November 2020
- Food Innovation Network
- MPI Strategy for New Zealand Food Safety 2019-2024
- MftE New Zealand's First Emissions Reduction Plan
- NIWA
- MPI The Future of New Zealand's Food Sector Exploring Global Demand Opportunities in the Year 2050
- MPI's Sustainable Food Fibre Futures Plant and Food
- MPI Situation and Outlook for Primary Industries SOPI, June 2023
- United Fresh
- Infometrics Te Matapae Report
- Education Counts

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