

Trevelyan's Newsletter

Trevelyan's
Growing a better future

Overview »



James Trevelyan
Managing Director

Sometimes problems are hard to see

When we first started the journey of Lean manufacturing, we asked our team for suggestions. After a few months, we had received little feedback. Shortly after, we started paying our team for any ideas that they brought forward. Once those ideas had dried up, I remember asking a group of our team what annoyed them or what problems they have had to deal with that day. I was taken aback at what arrived on the list. It was the realisation that all these problems are in fact opportunities if I could only remove myself from my involvement in the issues. The common challenges hindering a logical decision were emotional bias, not understanding or 'seeing' the problem properly, or being too invested in the issue and then judgement was clouded.

So, when I read this week's ISG information pack on the 2026 Supply Agreement Terms, there is a paragraph in KNZ requiring Zespri and suppliers to agree to a change that allows a Minority Group to have their concerns heard, and for a fair and reasonable decision to be made.

One of the issues that gave rise to this need to give disadvantaged Minority Groups a voice, started in late January 2021 during COVID. The Chinese customs had just conducted a video audit at Sanfords and Sealords, and they failed the audit. The Chinese customs deemed the World Health Organisation (WHO) standards adequate for protecting against COVID. A week later, Trevelyan's was to have a similar video audited by the Chinese equivalent of MPI for the packing of G3 organic fruit; the kiwifruit industry had also aligned itself with the WHO COVID standards. The fear was that we could potentially fail, and that the Chinese border would be closed to all kiwifruit for the forthcoming season. Chris Draffin, our head of quality at the time, called Zespri and discussed the risk of us failing the audit and China closing its borders. Zespri took the conversation away and called back, saying the risk was too high, so they cancelled the audit. The impact? No G3 organic could be shipped to China in 2021.

Should we have called Zespri, and did Zespri make the right call? Upon reflection, Zespri made the right decision based on commercial risk.

Zespri put together a discussion paper, which was considered by ISG and NZKGI regarding what a fair financial outcome would look like for the G3OB pool. The paper failed as it was deemed that the industry funds should not be moved from one pool to another- something that the industry agreed should not happen. This is effectively what happened when no GAOB went to China without first, a full discussion with postharvest facilities.

I struggled with the process. If this happens again, should we make a phone call and decide together, considering ALL the information?

After the 2021 situation, KNZ has become involved and is now pushing Zespri to set up an independent forum that can hear and consider these matters.

As an industry, we need to be better at seeing and solving problems;. these are tomorrow's opportunities.



Operations »

John Lewitt
Head of Operations & Logistics

Operations update

We finished our export shipping programme in mid-November, with the last of our Hayward and SunGold fruit loading out to Hong Kong. This concludes the 2025 kiwifruit season for us onshore, with 20 million trays of Class 1 fruit packed and shipped.

Our fruit has performed very well this season, with better than industry fruit loss for both conventional and organic Hayward, as well as for conventional and organic SunGold. For Hayward, our fruit loss was 40% lower than the industry average, and for SunGold, our fruit loss was 25% lower than the industry average.

Our offshore Supplier Accountability results are also looking positive. We still have a few results to come in, but as at mid-December, we earned double the industry average in premiums for SunGold and over one and a half times the industry average in premiums for Hayward. It is great to see good quality fruit from Trevelyan's arriving in the markets for our customers to enjoy.

We now turn our focus to preparing for the 2026 harvest season, which is only a couple of months away. We have several projects underway, which are all on track for completion in good time for the 2026 packing season.

In Packhouse 1, we have removed the sizer and replaced it with the 6-lane sizer that was removed from Packhouse 2 during the upgrade of that packing line last season.

In Packhouse 2, we are installing an automated bulk pack-filling system, which includes 12 auto box fillers.

In Packhouse 4, we are installing an automated robotic stacking system and a second automated layered packing machine.

All these projects will help us achieve a more efficient packing operation both in 2026 and in the future.

Finally, a big thank you goes out to all our team who have worked tirelessly to ensure we have had a successful 2025 packing and shipping season for Trevelyan's and for our growers.

The logo consists of the word "Kiwifruit" in a white, sans-serif font, followed by two white chevrons (») pointing to the right. The logo is set against a dark green, rounded rectangular background.

Mike Perrett
Head of Kiwifruit Grower
Services

Enjoy the moment

James Trevelyan, our Managing Director, will sometimes quip “enjoy the moment”, when things that are either planned or unplanned, go well. In the horticultural space, nothing is guaranteed, and success depends heavily on managing variables such as weather, politics, pests, and diseases.

Figures obtained for the export production year to 30 June 2025 are as follows:¹

The primary export product sector is currently in good health. Dairy production and prices remain buoyant as consumers seek protein. Dairy export revenue has lifted 16 percent to reach a record \$27 billion. This is driven by a strengthening global demand and a weakening of global supply, specifically decreased milk production in China. There is talk of a resurgence in farm conversions as confidence remains high.

Meat and wool export revenue increased 8 percent to \$12.3 billion. There has been a lift in meat export prices due to tighter global beef and lamb production, and a decline in NZ production.

Forestry export revenue increased by 9 percent to \$6.3 billion.

Seafood export revenue lifted by 2 percent to \$2.2 billion.

Horticultural export revenue lifted by 19 percent, reaching \$8.5 billion, of which kiwifruit is a major contributor.

The Minister of Agriculture, Todd McLay, has stated that the Food and Fibre sector will contribute \$59.9 billion to the NZ economy in 2025. 82.5% of all exports are derived from the Food and Fibre sector, growing at an average rate of 4.8 percent per annum over the past 10 years.

Zespri² has forecast total earnings of \$5.14 billion for the 2024/25 season.

Gold returns are steady, and the 5-year forecast is at \$11/Te to \$14/Te for conventional, and \$13.50/Te to \$16.50/Te for Organic. Green returns are encouraging, with the 5-year forecast providing a \$9/Te to \$11/Te for conventional and a \$12.50/Te to \$14.50/Te for Organics¹. This has created a return of confidence among Green growers, and current orchard sales reflect this optimism. Red returns have a 5-year forecast of \$12.50/Te to \$16.50/Te¹.

The top five export markets for all primary industries, per the latest MPI report are as follows¹:

1. China 31%
2. United States 12%
3. Australia 8%
4. EU 7%
5. Japan 5%

	Dairy	Meat and Wool	Horticulture
China	35%	24%	13%
U.S.A	5%	28%	14%
Australia	5%	4%	10%
E.U	n/a	14%	6%
Japan	4%	4%	10%

If I consider all the data I believe, the export outlook looks positive despite the onshore and offshore economic headwinds.

On home soil, we will continue to consider farm gate costs, the climate outlook, and labour supply; all factors that we face directly or indirectly every day as orchardists and farmers.

So, in summary, if you have had an 'acceptable' year both in volume, quality and net return – “enjoy the moment”.

References:

¹ [MPI](#)

² [Zespri](#)

Avocado »



Dan Birnie
Head of Avocado

The rollercoaster of horticulture

Weather conditions have been erratic, and as I write this article, I have just returned from an orchard visit to Paengaroa, that was hit by hail on Wednesday, the 3rd of December. While it looks like the hail event was nowhere near as widespread as the wind event earlier this year, on an individual orchard basis, this situation can be devastating.



I am pleased to see that the late local market is shaping up with some really promising returns. Many orchards have set excellent crops for next season, and with market conditions trending in the right direction, we're heading into the new year with a genuine sense of optimism.

At the same time, if you're considering converting to kiwifruit, we've put together a clear, practical cost model to help you understand what the investment could look like. Our Head of Kiwifruit Grower Services, Mike Perrett, has already been walking growers through it, and the feedback so far has been positive. Either path has potential, and it's about choosing the one that best supports your orchard and your future.

If you'd like more information, just get in touch with Anne or myself. We're here to help you make the best decision for your business.

Organic »



Bex Astwood
Organic Category Manager

Organic update

I hope you all had a wonderful Christmas and New Year, and that you've managed to enjoy some well-earned downtime before the year ramps up again.

OGR Forecast Update – Organic Green & Organic SunGold

Zespri's November 2025 forecast brought good news for organic growers, with both Organic Green and Organic SunGold showing stronger returns than first signalled in August. The tray and Ha prices for Organic Green and Organic SunGold are above the final OGRs for 2024/25, and at record levels per Ha.

	2025/26 November Forecast Per Tray	2025/26 August Forecast Per Tray	2024/25 Final Per Tray	2025/26 November Forecast Per Hectare	2025/26 August Forecast Per Hectare	2024/25 Final Per Ha
Zespri Organic Green	\$13.03	\$12.38	\$11.63	\$97,127	\$92,280	\$92,306
Zespri Organic SunGold Kiwifruit	\$15.46	\$14.83	\$14.93	\$176,777	\$169,448	\$156,390

Certified Organic Kiwifruit Association

COKA is dedicated to keeping the public informed about the Government's Gene Technology Bill. The Bill had its first reading in Parliament on the 17th of December 2024, which it passed, and was then referred to a select committee who have since completed their review and issued a report. At the moment, it's awaiting a second reading in the House of Representatives.

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It is interesting to note that within the Gene Tech Bill, a Regulated Genetically Modified Organism (GMO) is defined as:

Regulated genetically modified organism (GMO)

(a) means—

- (i) an organism that has been modified or constructed by gene technology; or
- (ii) an organism that has inherited (from the host organism) genes or genetic material that occurred in the host organism because of gene technology.
- (iii) an organism, or a category of organisms declared to be regulated genetically modified organisms, by the regulations referred to in section 162B; but

(b) does not include....

Note that genetically modified is underlined as this was a recommended addition by the Select Committee.

The bill does not include definitions or citations of Genetically Engineered (GE), or Genetically Engineered Organisms, as any organism that has been modified, whether through gene technology or GE, is still considered a GMO.

COKA hosted an event called 'The Future of Gene Editing (GE), Genetic Modified Organisms (GMO) & Precision Breeding (PB) in New Zealand', and speakers included, Prof. Jack Heinemann, Professor of Genetics and Molecular Biology at University of Canterbury, and Director of the Centre for Integrated Research in Biosafety (INBI), and Dr Bill Kaye-Blake, Principal Economist, NZ Institute of Economic Research (NZIER).

I encourage you to watch the recording of this event, which you can find on the COKA website here - <https://www.coka.co.nz/updates>

The Gene Tech Bill is an important piece of legislation, and it's worth taking a moment to understand what it could mean for New Zealand's future. Staying informed helps you make confident decisions and have your say on an issue that affects all of us. Staying informed helps you make confident decisions and have your say on issues that affect all of us.



Technical »

Gordon Skipage
Head of Technical

The ongoing quality conversation

As kiwifruit growers soon turn their attention to the 2026 harvest, it's important to keep the "Quality Conversation" front and centre. With one of the pillars of Zespri's success built around quality, it's important we all recognise the implications of getting it wrong.

For the last few years, the industry has struggled with fruit quality. As recently as at the kiwifruit industry's 2025 Season Debrief on 3rd December, Zespri presented information relating to specific quality issues that affected the 2025 season including:

- Storage Breakdown Disorder (SBD)
- Superficial Skin Rub (SSR)
- Explosive fruit
- Hayward softs
- Short stalks
- Physical Damage Rots and the differentiation between what causes Stem End Rots in Hayward and Gold3 (Botrytis and Phomopsis, respectively).

Grower's actions over the next few weeks/months will have a direct impact on quality, storage ability, fruitloss, and financial returns. To protect the Zespri brand, Zespri's Quality Standards are stringent, requiring "poor quality" fruit to be repacked prior to shipping, otherwise, financial penalties are imposed both onshore and in the market.

For growers, there are plenty of basic things you can do now to improve your fruit quality (and returns) at harvest time, and the top four I recommend are:

1. Don't overcrop

- Understand what is achievable in your orchard. Not all locations, soils, and vine health are the same, so it's important to understand what your vines can do. Low-lying/wind-prone areas are most susceptible to stress-related issues.

2. Cut out nitrogen at this time of year

- It's been widely reported that applications of nitrogen after the New Year have a direct negative impact on fruit storage. While your fruit may visually appear "great quality" at harvest, high nitrogen (often combined with low calcium) will contribute to fruit "falling over" in the coolstore. Your fruit will be shipped as a result and may require a repack (and associated costs).

3. Keep an eye out for explosive fruit on the orchard

- While not well understood, "explosives" start appearing from mid-January onwards, are more prevalent in wetter summers, and where vine health is compromised. Walk the orchard frequently, targeting areas where vines are most likely to be stressed (i.e. low lying or exposed areas). Look for fruit drop and/or fruit flies in the canopy, and do not girdle vines that look stressed or compromised; this point is very important.

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4. At harvest, keep an eye on short stalks

- Lines of fruit with “high” levels of short stalks at packing result in more punctures and physical damage rots, leading to more repack/quality issues. Typically, we see short stalks more in Gold3 than any other varieties, and in higher levels during KiwiStart. While not well understood, short stalks are believed to be linked to:
 - I. Immature fruit
 - When fruit has not reached “full maturation”, the abscission layer has not formed between the fruit and the stalk. When the fruit is harvested as “immature”, the stalk is not ready to “let go” of the fruit, therefore it snaps off close to the fruit, resulting in a short stalk.
 - II. Stressed/sick vines
 - Fruit is aborted before the vine is ready to harvest, resulting in weakened/shrivelled stalks that snap close to the fruit when picked.
 - At harvest, pay special attention to see if you have an issue with short stalks. If you find them, contact your Grower Representative to discuss what options/solutions may be available.

Addressing the four tasks mentioned will go a long way to ensuring a successful harvest and storage season for all. Most importantly, it will help reduce quality costs, ultimately improving your financial returns.



Sustainability »

Sarah Lei
Head of Sustainability

The devil is in the detail (and the data)

Over the past year, we have been reflecting on how we might reframe our “sustainability” efforts to better represent what we are trying to achieve and avoid some of the connotations that come with the “S word”. We have come up with various alternatives, including resource efficiency, environmental stewardship, green/planet consciousness, regenerative, responsible, low-impact, green, guardianship, kaitiakitanga, and triple bottom line. Nothing has quite yet resonated but we are continuing to explore this concept.

At its heart, sustainability is a continuous improvement process. At Trevelyan’s, this has a specific focus that aligns well with our business values.

- Minimising environmental impacts (Tread Lightly) while,
- Working Smart and Respecting our People.

Like any continuous improvement process, sustainable change relies on accurate data to understand problems, support decision-making, measure outcomes, and sustain long-term progress.

One of our projects over the last few years, has been working to reduce the emissions from our company vehicle fleet. This has given rise to a whole new level of data analysis as we seek to better understand where the emissions are coming from and what actions will create meaningful change.

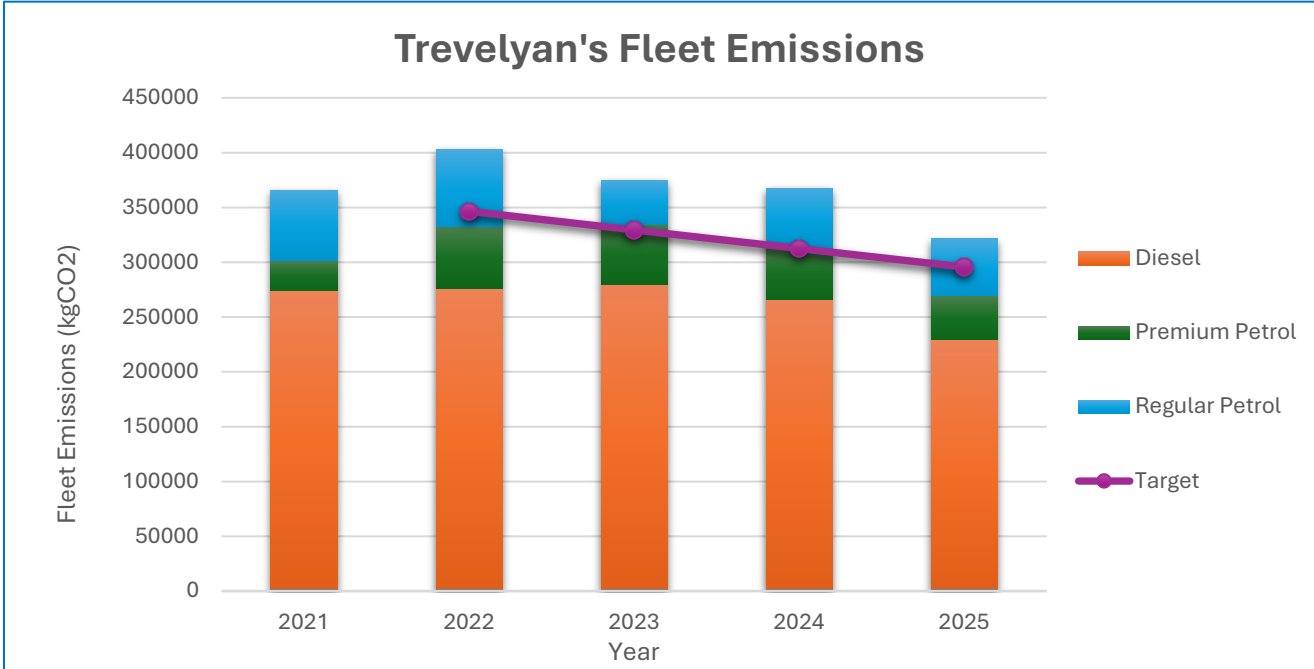
The most common emissions reporting standard used globally is the GHG Protocol, which groups emissions by Scope.

- Scope 1 includes direct emissions, arising from fuel used in company fleet vehicles, forklifts and other equipment, as well as refrigerant leaks.
- Scope 2 emissions arise from electricity purchased to operate the coolstores and packhouses.
- Scope 3 emissions are indirect emissions and are divided into 15 different categories.

Generally, Trevelyan’s buys fuel using company fuel cards, and we can use the litres of fuel purchased and the relevant emissions factor provided by the Ministry for the Environment (MfE) to calculate our fleet emissions (included in our Scope 1 Emissions). Our base measurement year was 2021 and to meet our Science-based Targets, we need to reduce our Scope 1 emissions by 4.67% per year, which provides us with an annual target.

The graph on the next page, shows that we are making progress in reducing our Scope 1 fleet fuel emissions, but we are still falling short of our target. However, when you dig into the data, it’s a bit more complicated than that.

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- Emissions in 2021 were likely to be lower than usual due to COVID lockdowns.
- As we transition to electric or plug-in hybrid vehicles, the emissions move into Scope 3, Category 6 (Business Travel) and include charging at home (charger provided), at paid charging stations and on site, so there's a lot more data to collect from various locations.
- Sometimes employees use personal cars for work or buy fuel with a credit card rather than a fuel card, so we also need to include this data.
- Some cars are just used by one person all the time, while others are moved around throughout the year, so we need to understand the vehicle allocations.
- We need to look at both fuel/electricity costs and emissions. There are also fees such as Road User Charges (RUCs) which apply to diesel, electric and hybrid, but not petrol cars.

All this means we need more detailed data analysis and reporting to understand the impact of the changes we make, and further to this, help our people understand how they can have a positive impact. Lastly, we also need time to observe trends due to the variability and seasonal nature of our business.

To date, we now have four electric fleet vehicles and six plug-in hybrid fleet vehicles. What we have learnt so far from looking at the detailed data is...

Type	Emissions Impact	Fuel/Electricity Cost Impact	Comments
Electric Vehicles	Significant reduction	Reasonable reduction	<ul style="list-style-type: none"> • Can generate range anxiety • Few cost-effective 4WD/AWD options • Towing significantly reduces range
Plug-In Hybrid Vehicles	Lesser reduction	Minimal reduction	<ul style="list-style-type: none"> • Great flexibility and more 4WD/AWD options • Impacts vary depending on charging and driving behaviour • Reduced towing capability

Detailed data analysis is an essential tool in sustainable continuous improvement and something Trevelyan's will continue to develop as we work to grow a better future.

Supply »



Debbie Robinson
Head of Supply

There is nothing permanent except change - Heraclitus

This will be the last newsletter article I write as my responsibilities at Trevelyan's have changed.

Earlier in the year, I read that Peter Ombler was stepping down as a director on Kiwifruit New Zealand (KNZ). I reached out to him to better understand the expectations of the role and decided to stand for the vacant grower director position on KNZ. I was successful, and my KNZ term officially began on December 1st, 2025.

To manage any conflicts of interest, or perceived conflicts of interest, it has meant I was required to stand down from all Industry-facing roles, these include New Zealand Kiwifruit Growers Inc. (NZKGI), Industry Supply Group (ISG), Organic Management Committee (OMC), Kiwifruit Product Group (KPG) and other industry subgroups. In all forums, I have always represented the views of the Trevelyan Growers Ltd (TGL) Directors in the best interests of the growers that pack at Trevelyan Pack and Cool (TPCL) while taking into account the overall Industry good.

Significant changes have happened both at Trevelyan's and at an Industry level since I became involved over 20 years ago. When I joined the business, we packed 600K trays of kiwifruit and a small amount of local market avocados. There was 1 packhouse (grader) and 2 coolstores. Trevelyan's now supplies over 10% of the total industry kiwifruit volume with 21M trays of kiwifruit and 1M trays of avocados forecasted for 2026, and has 5 packhouses and 43 coolstores, with another one currently being built all on the same site. Additionally, automation, CA, and bulk storage technologies have been introduced that have increased productivity and will continue to do so.

The grower base and orchard ownership have changed considerably over time. Most orchards were individually, or family owned, now, there are far larger commercial growers and investment orchard entities, including Māori kiwifruit growers; it is so good to see this increased diversity in our grower base.

My change in role means I will no longer be Head of Supply with my title changing to TGL Manager. , This means I will still be involved in grower payments, forecasts, TGL Grower Agreements, facilitating monthly TGL meetings, etc., but with decreased hours.

I'm pleased to advise that Donna Bennett will now represent TGL at ISG and other industry forums with Courtney Bragg becoming the new TGL grower entity representative at NZKGI. I have no doubt they will both do an excellent job.

My final words as I sign off on my last newsletter article.

I was going to write about the current state of the industry, the value of the SPE, the strength of the brand, and record returns for growers, but I realised that while all that is true, the thing that matters most to me is the people I have interacted with across so many parts of the industry.

The beautiful people I work with at Trevelyan's who genuinely care about doing the best job they can to add value for the growers. The other supplier representatives, while not always agreeing with each other's point of view, still retain a healthy respect for each other. The amazing Zespri staff both on and offshore that I have worked with or met and been hosted by while visiting the markets, and of course, the growers as without their investment and commitment, there would be no industry.

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I'd like to take this opportunity to thank the people/friends who trusted in my ability, mentored me, and helped me grow throughout my career.

I'm looking forward to my term on KNZ. I know I have a lot to learn, but I hope that with the industry knowledge I have gained, I will be able to add value.

Hopefully, while you are reading this, you are enjoying a relaxing NZ summer break with friends and family.

Mā te wā

The TAGL logo consists of the letters 'TAGL' in a white, bold, sans-serif font, followed by two white chevrons pointing to the right. The logo is set against a dark green background that has a rounded top-left corner.

Ashby Whitehead
TAGL Chair

Quarterly TAGL update

Export Market Diversification

There is a growing appetite within TAGL to see the avocado industry broaden its horizons and reduce its reliance on Australia by building a more diverse and sustainable portfolio of export markets. Growers see real opportunity in developing new channels that can support long-term value and resilience.

This season has highlighted the importance of continued progress in this area. While growers naturally aim for strong returns, the current harvest has shown how valuable it is to have multiple market options available. Earlier guidance suggested harvest would need to be completed by Christmas, and this has created pressure for some growers to have fruit picked on time—reinforcing the need for flexibility and market reach.

Another topic raised is the increasing volume of fruit remaining in New Zealand. Growers supplying an exporter are eager to see their fruit moving offshore and contributing to the growth of our international presence.

Packhouses and contractors have also expressed a desire for more consistent throughput. Many are operating reduced hours, which makes long-term planning and staff retention challenging. Greater market diversification could support steadier production and improved operational efficiency.

Overall, there is strong and constructive interest across TAGL in exploring how a more unified industry structure could help create stability, unlock new export opportunities, and support better outcomes for growers and post-harvest operators alike.

The logo for TGL, consisting of the letters 'TGL' in white on a dark green rounded rectangular background, followed by two white chevrons pointing to the right.

Colin Olesen
TGL Chair

Onward and upward for fruit quality

I am penning this article immediately following your Directors' December Board meeting.

We continue to have a strong focus on fruit quality and on exploring ways to ensure our growers get the maximum returns from their fruit.

The basis for this was embodied in our 'Corporate Purpose Statement' that was finalised at your Directors' November Board meeting:

Our purpose is to maximise fair and sustainable financial returns for our growers, and to ensure their views are represented with TPCL and the wider industry.

Your Directors are of the opinion that the kiwifruit industry's overall fruit quality is heading in the wrong direction. For Trevelyan's growers, we want our fruit quality to be constantly improving and believe that the starting point for that must be at the earliest possible point in the chain of supply, and that is harvest time.

We addressed the issue of explosive fruit a year or so ago, with the introduction of progressive charges to encourage explosive fruit to be dropped to the ground at harvest; this process seems to have had the desired effect.

The most pressing cost to quality is related to short stalks and the damage they cause to fruit alongside in the bin. We estimate the cost this year to the Gold pool is over \$300k. Because this cost is shared by all pool participants, your Directors have applied their policy that costs, as far as possible, be borne by those who incur them.

For the coming harvest onward, there will be a progressive charge for short stalks starting at a 2% threshold. Full details will be included in the usual annual legal agreements. The proceeds from this charge will be fully applied to the variety pool. The reason is that the pool is presently taking the hit for the quality impact, so any recovery of quality costs should go back to that same pool.

Your Directors agreed to leave all pool splits, apart from Hayward Green Organic, unchanged at 50% direct and 50% pooled, while Red and Sweet Green are 100% direct. Because of the low volume in the Hayward Green organic pool, it was agreed that the pool split for the coming season will change to 40% direct and 60% pooled. Our pool splits reflect our position on fruit quality – that excellent fruit presented to the Packhouse should be rewarded and not socialised.

With Deb Robinson elected as a Kiwifruit New Zealand Director (congratulations, Deb) Deb's role within the industry representing TGL have been changed to other Trevelyan's personnel. Thank you, Deb, for your years of excellent representation on TGL's behalf.

When you read this, the New Year will have already begun. May you enjoy what is left of the holiday season, and my best wishes for a successful kiwifruit harvest that will be upon us shortly.

General »



Trevelyan's top ten wins for 2025

Narrated by some of Trevelyan's team, we wrap up 2025 and share what we feel are our top ten wins for 2025!

Click the thumbnail below and it will take you through to our YouTube channel.

