

NORTHLAND SHARED FOOD GRADE MANUFACTURING FACILITIES PROJECT

Stage One: Assessment of Need 2022

NGAWHA
INNOVATION
& ENTERPRISE
PARK



Far North
Holdings Limited

NorthlandInc
Growing Northland's Economy
Kia hupu ai te Whanga o Te Tai Tokerau

THE **FOODBOWL**

Funded by



Agriculture & Investment Services
Ministry for Primary Industries
Manatū Ahu Matua

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This report has been commissioned by Northland Inc and Far North Holdings Ltd, and funded by the Ministry for Primary Industries' Sustainable Food and Fibre Futures fund, to inform plans of proposed facilities as part of the development at the Ngawha Innovation & Enterprise Park.

Research has been conducted during the last quarter of 2022 with the primary purpose of assessing demand for shared food grade manufacturing facilities in Northland.

Disclaimer:

The purpose of this document is to provide information to assess the potential demand for these facilities. It does not guarantee that these facilities will be built unless there is reasonable surety that they will be commercially sustainable.



EXECUTIVE SUMMARY

This project takes a targeted approach to deeply understand the manufacturing and collaboration needs for Northland's food, beverage, and natural products companies. The following questions and subsequent summarised answers provide an overview of what has been learned during this first stage of engagement.

What are the challenges facing Northland's food, beverage and natural products industry that may be stopping producers from manufacturing finished products within region?

- Lack of dedicated facilities, specific technology, R&D expertise, integrated transport and logistics services.
- Business owners want to collaborate with others for many reasons but are unsure how to develop sustainable industry networks outside of their day-to-day operations.
- Over 40% of the population in Northland are Māori and this number is approximately 75% in Kaikohe, where The Park is located. There is a great desire to enable successful outcomes from Māori-owned businesses and for Māori landowners to create better outcomes for their land and whanau with a specific focus on the production and manufacture of food, beverage, and wellness products.

How does Tai Tokerau become less reliant on out-of-region facilities and resources for processing and manufacturing food grade products?

- By creating a fit-for-purpose facility that not only offers useful equipment, but also offers access to support services like process engineering, logistics, administration, health, safety and food compliance, export knowledge and compliance advice, and sales and marketing expertise. By providing infrastructure and expertise for better sustainability outcomes.

Is there a gap in our local capability and expertise and if so, how do we fill this need for future growth?

- Yes, the potential to tap into the expertise and experience of the NZ Food Innovation Network to establish a programme that develops our local talent for long-term career prospects is seen as the channel for success.
- The Park is already engaging and employing a cohort of around 70 local people. To date there has been zero staff attrition which is testament to the inclusive, supported and collaborative environment provided for growth. Most have already developed transferable skills as they are employed across various stages of expansion at the Park. This demonstrates an impressive foundation for creating a local talent pool where exciting career options in value-added manufacturing is possible.

How do we attract more business from outside the region and realise the potential for Tai Tokerau to become a leading producer of high-quality food, beverage, and natural ingredient-based products?

- New Zealand is already challenged by a lack of manufacturing facilities. But more than this, the holistic proposition of Ngawha Park has been highlighted across the engagement as a very future-forward answer to a lot of the current business problems. The power of collaboration that could evolve from this is attractive to many outside the region as nothing like this currently exists.

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INTRODUCTION

Ngawha Innovation & Enterprise Park (Ngawha I&E Park, the Park) is a comprehensive large-scale development based in the mid-North of Tai Tokerau that has been set up to provide a place for value-added manufacturing for the region's primary sector raw materials including support for a thriving food, beverage and ingredient processing and manufacturing industry in Northland.

The holistic approach signals a ground-breaking way of doing business for Northland's horticulture and subsequent value-adding processing industry. It is underpinned by a Kaupapa to provide a destination where people, business and innovation grow hand in hand with marketable competitive advantage, and where kaitiakitanga of the environment is a priority.

As stage one of development at Ngawha I&E Park is nearing completion, the first purpose-built facilities will soon be occupied by a natural health product manufacturing cluster, education and training providers, economic development business support service providers and the Park's management team. This first stage of development has already seen The Park's first commercial berry harvest.

Focus now turns to stage two at Ngawha I&E Park which aims to meet the need of food, beverage and ingredient producing businesses by developing facilities that enable in-region processing, manufacturing and delivery to market.



THE PROBLEM WE ARE LOOKING TO SOLVE

Traditionally, due to lack of established infrastructure these food, beverage and ingredient production businesses in Northland have had to operate a predominantly inter-regional model. Moving raw ingredients to other centres for redistribution or for value-added manufacturing because there is limited facilities for end-to-end value stream execution (raw material to finished product) in Northland.

When post-farm employment is compared with other regions, it is clear that Te Tai Tokerau creates less from its abundant raw materials. As an example, Northland creates 1.5 processing jobs for every 1,000 tonnes of raw materials, compared with Hawkes Bay which creates 7 jobs or Auckland which creates 30.5 jobs per 1,000 tonnes.

The Park aims to meet the needs of our local industries by creating fit-for-purpose facilities that will enable more production and manufacturing within the region.



BACKGROUND

Tai Tokerau has a very long and dynamic history of food and beverage production. It has many environmental advantages, such as fertile growing conditions, vast coastal access, close proximity to the largest domestic markets, and is the only subtropical region in the country. The opportunities in these sectors continue to be some of the most important economic drivers for the region.

Where there are opportunities however, there are equally challenges for a region that in the past, has often suffered from a lack of consistent investment in long term, inter-generational strategic development, a large geographical spread with relatively low population density, and enough resource and infrastructure to attract and support the ongoing development of an engaged and skilled workforce.

In the last five years substantial focus has been put on the essential role of our primary sectors and food and beverage industries in Northland. The direct impact that success in these areas can have not only in economic terms, but in social and cultural outcomes is powerful and profound.

As a result, there are multiple overlapping projects underway in Tai Tokerau where our kai is a vital focus area, some of these include:

- Ngawha Innovation & Enterprise Park
- Extension 350
- Peanut Trials
- Regional Food & Beverage Tourism Strategy
- Tai Tokerau Northland Economic Action Plan
- Collaboration Tai Tokerau
- Investment in water storage

OUR OPPORTUNITY

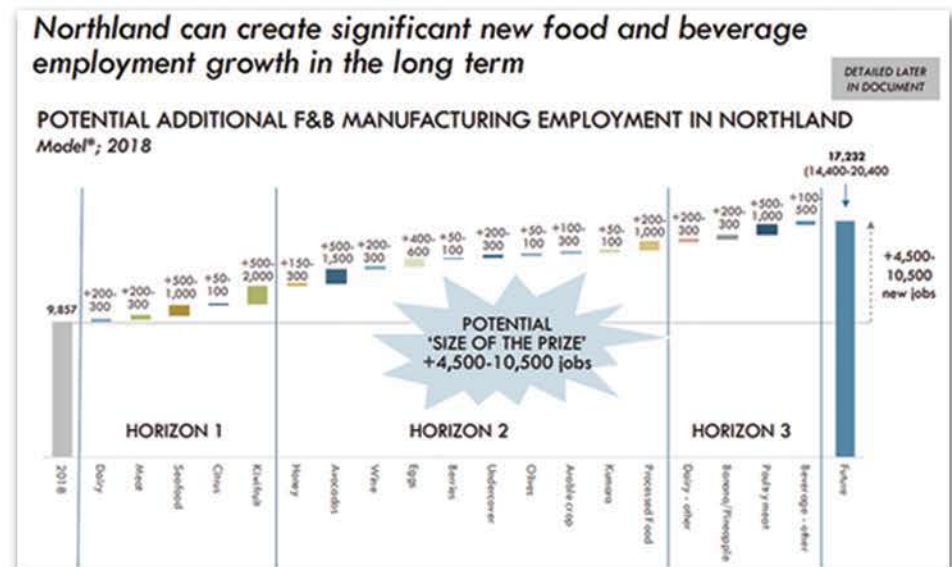
In 2019 a report was delivered by Coriolis to understand regional growth opportunities for employment in the Northland Food and Beverage Industry. Commissioned by Northland Inc, the report takes a deep dive into the potential types of Northland F&B production. It makes some important observations that highlight known challenges, alongside some very accessible opportunities for consideration. The information in this report informed the concept and design of the Ngawha I & E Park.



FROM THE REGIONAL GROWTH OPPORTUNITIES REPORT:

'Northland faces challenges. Interviewees highlighted the key challenges to growth in the F&B sector as scale, value added processing and expertise, logistics (road, rail and port) and water storage. Representatives suggest a collaborative approach to resources, plus investment in a facility with shared equipment and resources.'

'The potential employment size-of-the-prize for Northland is estimated to be between 4,500 and 10,500 new jobs. These jobs are across three key growth horizons; the core sectors, emerging growth sectors and all new sectors.'



Page 32 of the 2019 Coriolis Report: Regional Growth Opportunities in Northland in the Food & Beverage Industry.
¹Potential Gross Employment Growth independent of any projections of on-farm employment losses in some sectors; based on Coriolis modelling, research, estimates and past work; treat as aspirational and indicative.

THE SHARED FOOD GRADE MANUFACTURING FACILITIES PROJECT

Previous research and collective knowledge signals that there is a need for shared food grade manufacturing facilities in Tai Tokerau. But rather than making assumptions on behalf of the industry it is essential to quantify this. In order to be successful, it is important to truly understand the region's current needs in this space, along with the developing needs of the future. The best way to do this is through direct consultation with those who are already doing business in Northland, and others with proximity to the region to hear from them first-hand.

PROJECT OBJECTIVES

To deeply understand the manufacturing and collaboration needs of food, beverage and natural products companies based in Northland and/or those accessing Northland's raw materials for further value-adding processing and production.

PROJECT OUTCOME

To establish the technology needed by the majority of potential users, quantify the potential throughput, and to develop an operating model (with the expertise to operate such a facility) that would give confidence to Far North Holdings Ltd to invest in building these facilities at the Park.

PROJECT APPROACH

This report constitutes the first stage of this project only: the outcomes of industry engagement to establish the need, the technology and the potential demand for facilities.

SHARED FOOD GRADE MANUFACTURING FACILITIES ASSESSMENT PROCESS

The project has taken a targeted approach, first reaching out to business owners which fit the following criteria:

- Established and already using or producing raw ingredients grown or sourced in Northland.
- Growers of raw ingredients looking to value-add with relevant proximity to Northland.
- Businesses creating food, beverage or natural wellness products looking to make better use of waste streams or by-products.
- Food, beverage, and natural ingredient-based businesses with established market demand.
- Food, beverage, and natural ingredient-based businesses looking to innovate and grow.

In total, over 80 companies were approached individually via phone call and email to take part in the demand assessment. Broadcast communications via social media and e-newsletters also invited others to learn more and contribute to the assessment for demand. We spoke to 35 people via a series of 4 workshops, some of who also provided written feedback. In addition to information gathered through the workshop process, a needs assessment survey has completed by 30 people.

Representatives from membership organisations of food, beverage and wellness industries across New Zealand were also consulted. In particular, the Food Innovation Network (120+ companies on their directory), Natural Health Products NZ (represents 130+ organisations) and the Bioresource Processing Alliance (supporting hundreds of primary industry R&D projects across NZ).

The engagement also included contributions from consultants for developing F&B producers in Auckland and Northland, and representatives of local Māori landowners and Māori business owners involved in the food, beverage and natural products industry.



SHARED FOOD GRADE MANUFACTURING FACILITIES ASSESSMENT PROCESS

As Ngawha I&E Park aims to meet the needs of our local industries by creating fit-for-purpose facilities, enquiry includes a series of qualitative questions that have been directed to the focus groups. In addition the project team have kept the following objective questions in mind:

- What are the challenges facing Northland's food, beverage and natural products industry that may be stopping producers from manufacturing finished products within region?
- How does Tai Tokerau become less reliant on out-of-region facilities and resources for processing and manufacturing food grade products?
- Is there a gap in our local capability and expertise and if so, how do we fill this need for future growth?
- How do we attract more business from outside the region and realise the potential for Tai Tokerau to become a leading producer of high-quality food, beverage, and natural ingredient-based products?

An outline of the answers to these questions from our engagement is highlighted in the Executive Summary of this report.



COLLATING THE RESULTS

Of the total approached, information was provided by approximately 45 business owners.

The invitation for feedback remains open as this report is compiled and engagement continues.

The findings detailed in this report represent the voices of those individual business owners interviewed, as well as aggregated results from representing agencies.

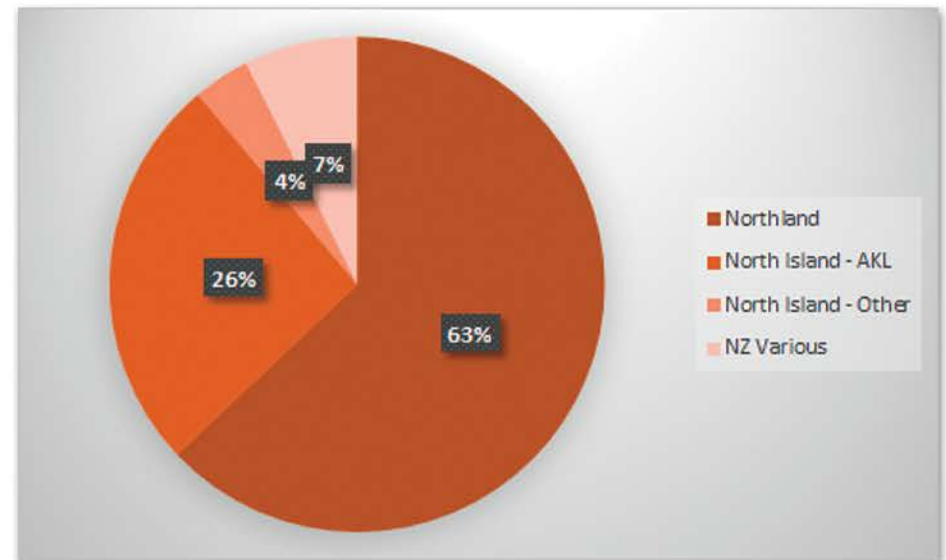
Survey results primarily contribute to the graphs presented, while anecdotal evidence and important industry insights collected as part of the engagement process are highlighted throughout.

THE RESULTS

CURRENT COMPANY LOCATION BY PERCENTAGE

LOCAL CONTEXT

Businesses based in Northland and Auckland have provided the majority of the information and most have contributed individually. Part of these segments do also include businesses who are represented by consultants working to support food production businesses or Māori landowners.



OTHER LOCATION INSIGHTS

- ▶ Those shown as based in other parts of the North Island and in various locations across New Zealand have generally been represented by industry organisations, namely the Food Innovation Network, Natural Health Products NZ and the Bioresource Processing Alliance.
- ▶ The aggregated location results are accepted as being a fair representation of the potential companies that could consider accessing the facilities if the proposition made sense financially and operationally.

THE RESULTS

MANUFACTURED PRODUCT TYPE

From the information provided by business owners interviewed, the product types manufactured have been broadly categorised into the groups shown.

CONTEXT

Among these product categories, contributing business outputs include:

Edible (juice, sauce, blends) Culinary

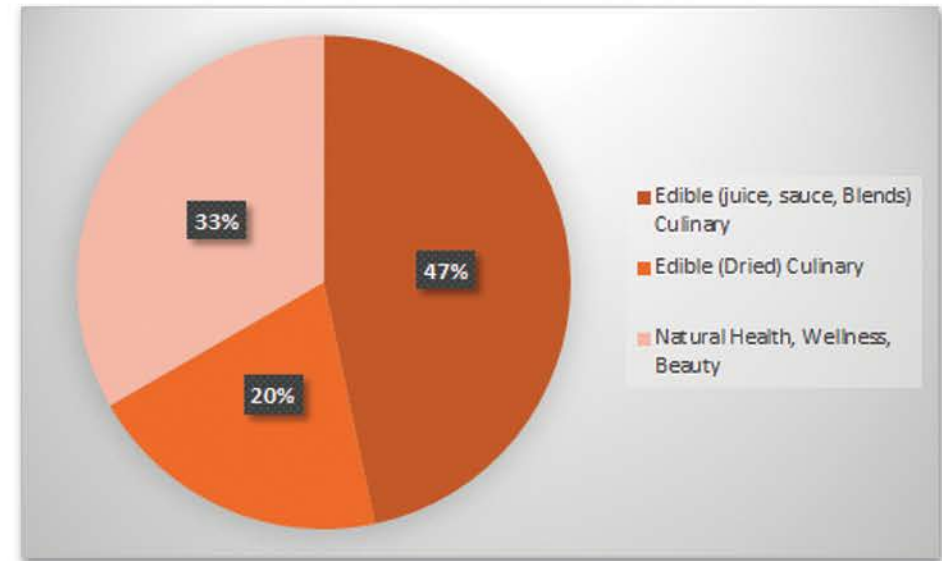
- Honey producers
- Honey-based culinary products
- Citrus growers
- Avocado and olive oil manufacturers
- Chillies and chilli-based culinary products
- Coconut and avocado-based culinary products
- Honey mead
- Kumara products
- Plant-based milk, ice cream and sorbet
- Fruit based gelato (dairy & dairy free)
- Vegan shelf-stable base products
- Fresh water from sea salt production

Edible (dried) Culinary

- Dehydrated vegetable-based culinary products
- Freeze-dried fruit products
- Air-dried fruit and vegetable culinary products
- Sea salt

Natural Health, Wellness, Beauty

- Manuka-based natural skincare
- Manuka-based and yakon wellness products (culinary)
- Natural therapeutic products
- Medicinal cannabis (emerging)
- Plant-based wellness products
- Indigenous ingredient-based wellness supplements
- Natural skincare products

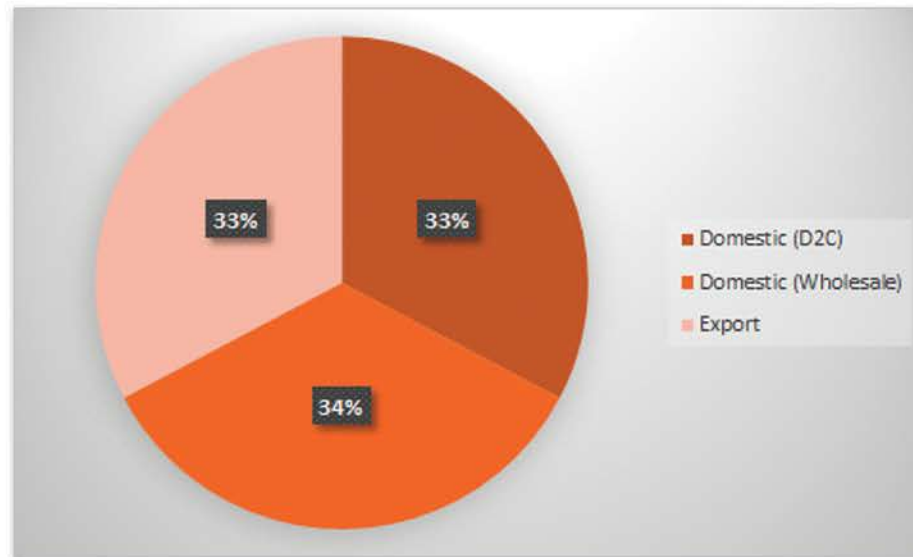


Feedback was also provided by māori-owned organic horticulture growers, an emerging circular waste company, and a māori-owned initiative providing guidance and support to māori landowners converting unproductive land into profitable forestry, agricultural or horticultural units.

It also included aggregated information from consultants to small and medium food and beverage businesses, representatives of wellness supplement businesses, representatives of natural skincare companies, and primary sector businesses creating value from biological by-products.

THE RESULTS

MARKETS SUPPLIED



CONTEXT

For most companies interviewed, their markets consist of a mix of domestic and export.

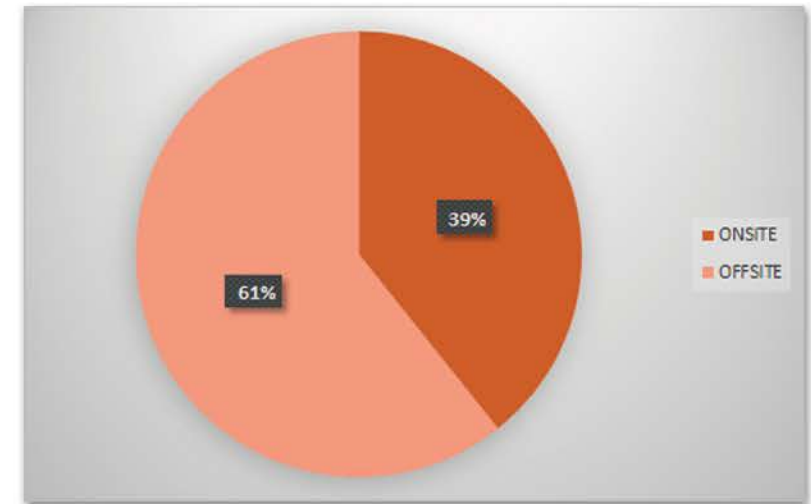
Some mid-sized speciality producers are focused on growing direct to consumer and/or domestic wholesale channels.

We also heard from a number of larger producers with established export markets, as well as those already supplying substantial quantities of raw product to supermarkets and other value-adding manufacturers.

THE RESULTS

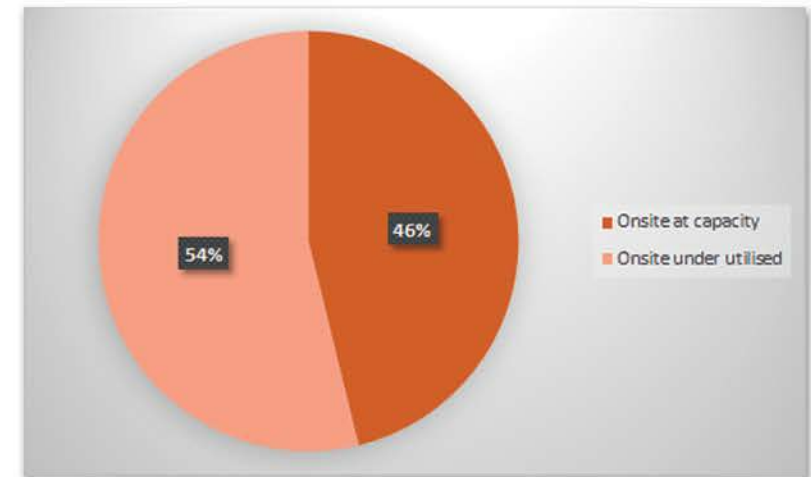
CURRENT MANUFACTURING LOCATION: ONSITE VS. OFFSITE

Of the total group interviewed we can see that just over a third of businesses are currently using onsite manufacturing facilities while the remainder rely on external providers.



ONSITE MANUFACTURING CAPACITY

Of the 39% operating onsite manufacturing facilities, many businesses fall into the category of specialty food or wellness products where facilities are fit for purposes of relatively small production. However, this segment also includes some more mature companies with larger facilities.



ONSITE MANUFACTURING INSIGHTS

► When gauging the capacity of onsite facilities, there is much anecdotal feedback that describes challenges faced with aging equipment and the ability to fund upgrades, or having reliable back-up systems in place to avoid productivity disruptions when repair and maintenance is required.

► It has been suggested that the question regarding existing capacity could have been investigated further to capture responses to 'Do you have efficient onsite capacity?'.
► The under-utilised segment also includes manufacturing facilities that are not currently in use around the clock, i.e., could have capacity for night shift production. Or for seasonal manufacturing where facilities may be under utilised during the off-season.

THE RESULTS

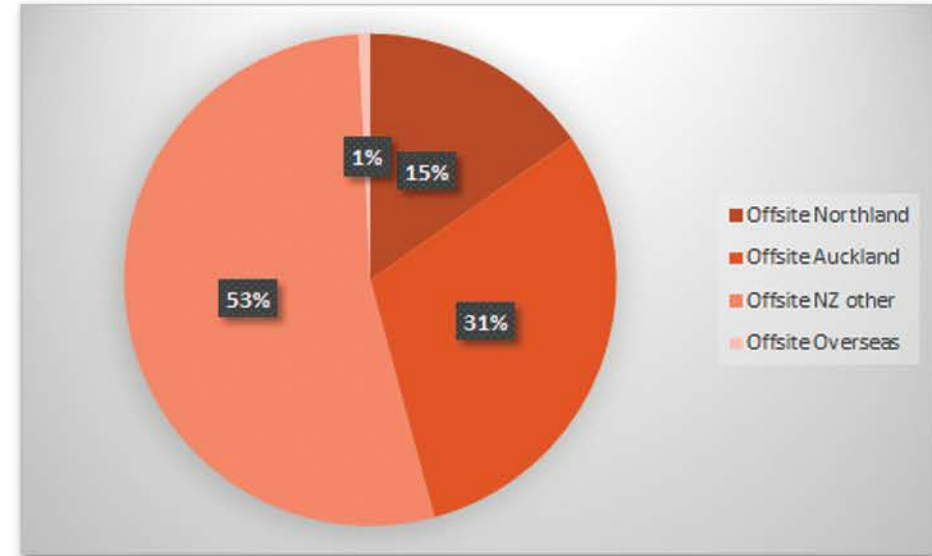
OFFSITE MANUFACTURING LOCATION

CONTEXT

Of the 61 percent of companies using offsite manufacturing facilities, there are only a small portion using facilities based in Northland on a contract basis. This mostly represents emerging businesses and the use of commercial kitchen spaces offering part-time access.

OFFSITE MANUFACTURING INSIGHTS

- ▶ Feedback from numerous companies and representing membership organisations reported a very high demand for contract manufacturers across New Zealand. Demand is increasing with many on waitlists for production.
- ▶ Those who are using offsite manufacturing services often face additional challenges. In particular, SME's that are still in the process of growing market channels and do not yet meet the minimum batch runs set by many providers. These businesses either risk committing to higher production runs and holding more product than they can sell, or stalling regular production to meet thresholds, causing disruptions in timely supply to established and growing markets.
- ▶ There is also frustration from some SME owners who need the expertise of Food Technicians as part of their ongoing product development lifecycle. These food technical subject matter experts are often unavailable or can only offer limited services.



- ▶ Evidence suggests that emerging businesses are often seen as a 'distraction' to core business, so they are at the mercy of the contract manufacturer when looking to expand product type under the same roof.
- ▶ As part of some offsite manufacturing agreements, there may also be a requirement to use base or blending ingredients supplied by the manufacturer for cost-effective production. This can lead to ethical compromises, simply to achieve market delivery.
- ▶ In other cases, the specialised commercial-scale processing equipment and expertise required for some products (particularly in wellness supplement industries), simply does not exist in New Zealand. Businesses are therefore forced to look offshore.
- ▶ The small segment of overseas manufacturing is anecdotal provided by representative organisations so this will be higher in reality. For the purposes of this report however, this small percentage is relevant in the view of those that could consider a move back to local production if the right skills and technical equipment were available.

THE RESULTS

RAW MATERIALS ACCESSED

This chart represents the percentage of businesses that identified these raw materials as the main ingredients of their current production. Many businesses interviewed (85%) sourced a most of their raw ingredients from New Zealand. The main reason for using imported ingredients is due to specific products not being readily available (or in sufficient quantities) in New Zealand.

IMPORTED INGREDIENT INSIGHTS

▶ Some of the common imported ingredients include emulsifiers like lecithin, hemp seeds, coconut oil and fibre, macadamia nut oil, organic turmeric and bioactive compounds.

▶ Those using imported ingredients would prefer to source locally but where there is potential for local supply, it is often coupled with a higher price tag so would put pressure on profitability.

▶ Importing ingredients is often met with hurdles due to current world-wide freight disruptions and increasing costs of import.

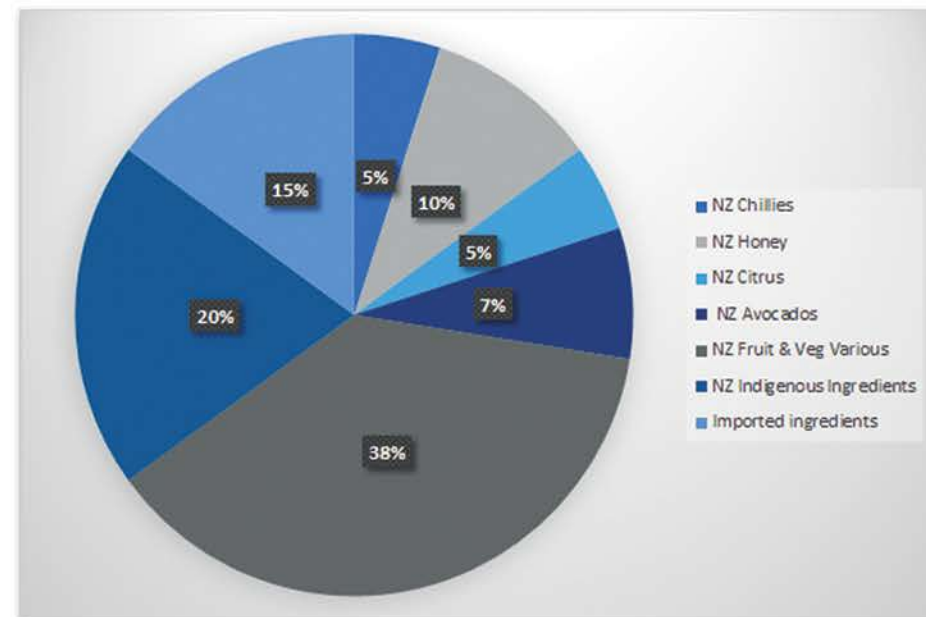
WIDER INDUSTRY INSIGHTS

▶ There is a notable growing consumer demand for natural health and wellness products and evidence suggests more businesses emerging to meet this increasing demand.

▶ As research develops to prove many beneficial properties of native New Zealand ingredients, there are also a number of companies looking to incorporate these ingredients in their products. However, there is a lot of work to be done for these ingredients to comply with international regulations.

▶ The new New Zealand Therapeutic Products Bill will be introduced by the end of 2022. But regulations are yet to be drafted so a lot of businesses making products containing NZ native ingredients are already experiencing export constraints and can be confined to domestic markets in the interim.

▶ Discussion also indicated that sharing not only manufacturing facilities, but a lot of other costs like compliance, R&D, repairs and waste reduction at the Park would benefit and lower barriers for everyone. The opportunity for enhanced sustainability is also very attractive to many.



THE RESULTS

CONTEXT

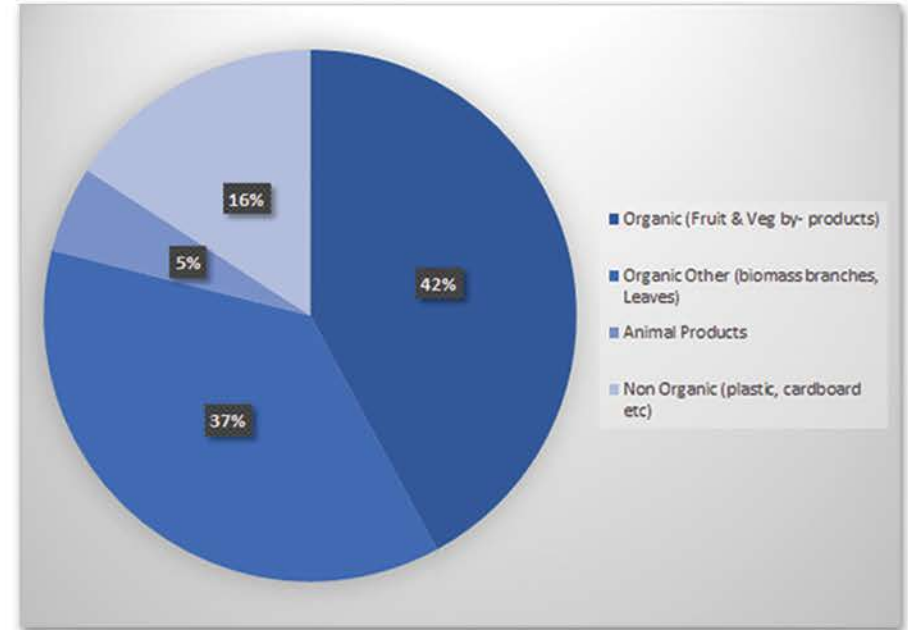
Not every business noted waste or by-products generated. Of the 30 survey results, those that did are shown here. Other waste streams likely not considered by respondents would be water, chemicals, and waste from generated from transport.

WASTE & SUSTAINABILITY INSIGHTS

- ▶ It is evident there is strong motivation for many businesses to incorporate sustainability practices as part of their operation (waste generation aside). Not only when considering an environmental footprint, but to illustrate the ethical principles to consumers which are often guiding principles at the heart of their enterprise.
- ▶ This was emphasized at each of the workshops held as it was the subject of much discussion.
- ▶ In terms of waste, many are already actively investigating ways of making better use of by-products and taking steps towards this. For others it remains a problem yet to be solved.
- ▶ In a lot of cases, surplus organic matter is not utilised, or it may become supplement stock feed or be returned to the land via composting practices. In some cases, companies are sending bulk loads of second and third grade raw ingredients to other centres for processing (juicing, drying, extraction). They agreed that if they could do this in Northland they would get benefits in terms of lowering their carbon footprint and potentially get higher returns.

CURRENT WASTE STREAMS

Results show the percentage of companies dealing with these various waste streams.



The value of bringing diverse businesses together in these interactive forums was highlighted through conversations between those taking part, especially in the the area of waste streams.

There were multiple occasions where one company's by-products were in demand by another. As a result, we are aware of these conversations contuining as problem solving leads to more business-to-business collaboration. Some examples of where these ideas started are; peptides from avocado stones to be used in skincare, seconds fruit to be used as juice and pulp in other products, and potential to use extracts from plant biomass.

THE RESULTS

CAPABILITY REQUIREMENTS OF A SHARED MANUFACTURING FACILITY

CONTEXT

Our industry engagement signals the capability requirements for manufacturing facilities can be grouped into the categories shown.

Many companies need more than one type of processing, and it is logical that end-to-end production would be ideal, by having packaging and/or bottling facilities available for finished products.

WIDER TECHNICAL & CAPABILITY INSIGHTS

► Other commentary regarding capability need includes the requirement for onsite ambient and cool storage space, and access to integrated freight and distribution as pre-requisites to considering Ngawha as a manufacturing location.

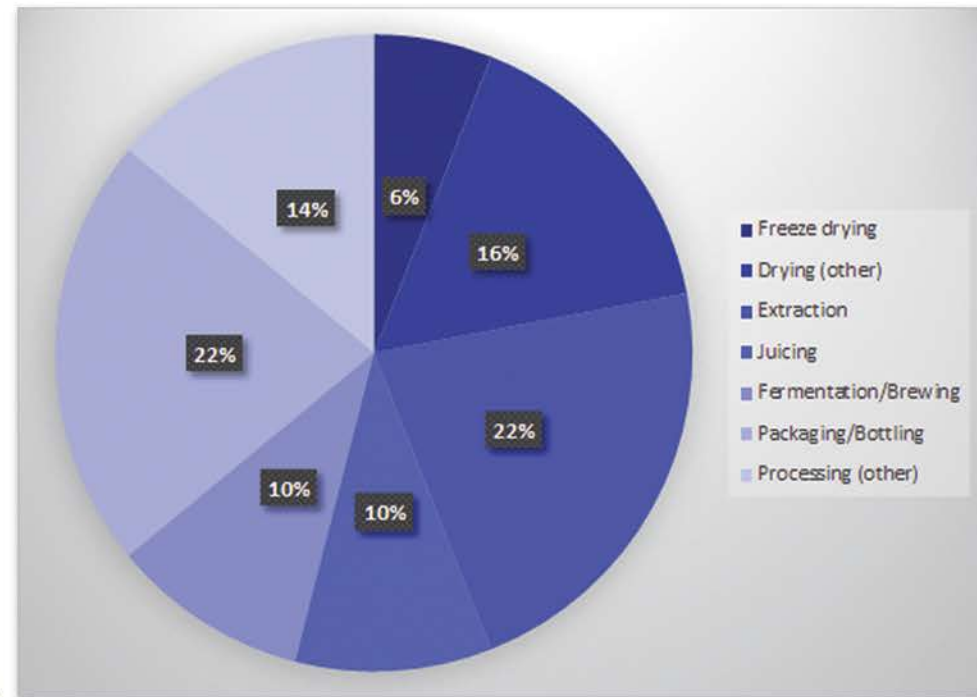
► Testing for quality assurance, ingredient and products was also highlighted as a regular service that is being outsourced, often with long wait times and attracting additional freight costs.

EXPORT INSIGHTS

► Export is part of many businesses current or future plans and this raised a number of benefits to be gained from having an Export Office at the Park to support the successful outcomes in this activity.

► Taking into account the considerable growth and demand in the natural health supplement sector, it was again highlighted that New Zealand is dealing with a huge gap in capability, both in expertise and specialised equipment to become a credible player in this market, especially when it comes to export delivery. It is expected that the the new New Zealand Therapeutic Products Bill and the subsequent regulations to come from that will expose this issue further.

MOST USEFUL MANUFACTURING FACILITIES REQUIRED



THE RESULTS

URGENCY FOR ACCESS TO A SHARED MANUFACTURING FACILITY

CONTEXT

Due to the targeted approach of this engagement, those interviewed are predominantly involved with established businesses and are already accessing the facilities required for current production levels, be it onsite or offsite.

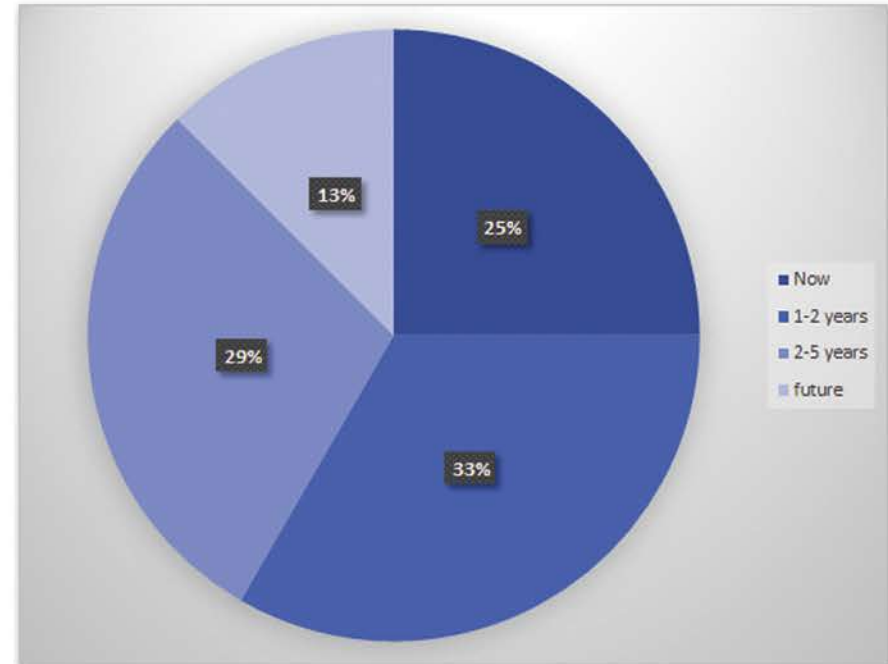
URGENCY INSIGHTS

▶ In the most part, those indicating an immediate need are in the midst of growth and are at a stage where they have already, or will very soon outgrow their current situation. Others are looking for a better solution that is closer to their location of business and/or offers more control of their end-to-end production.

▶ The segment of responses that indicate a need in 1 - 2 years or 2 - 5 years are most often looking to their immediate or planned growth horizons.

▶ Along with the ability to meet increasing demand, these businesses cite a number of reasons for considering a change in their current production. These include the desire to innovate with new product development, achieving better outcomes around sustainable practices, and looking for better financial outcomes.

'HOW URGENT ARE YOUR MANUFACTURING NEEDS?'



Another notable theme that appeared in every forum was the acknowledgement that doing business in these industries is getting harder which is stimulating different ways of thinking.

Traditional competitive standalone operations are less attractive in favour of the concept of pooling resources, expertise and capability for smarter outcomes.

The willingness to collaborate with others is very evident, especially if the proposition of a 'one-stop-shop' was available to enable this.



WHAT WE HEARD

“Loved the meeting I attended. I got a lot of valuable information and I am excited that the North has this I&E Park”.

“Thank you once again for inviting me to participate in this exciting project. I am looking forward to being a part of helping it succeed and improving the capabilities of an underutilised Northland!”

“To future proof your manufacturing offering, I would be looking at the innovative formats that are being showcased at trade shows like SupplySide West (Las Vegas, October '22) and Vitafoods Europe (Geneva and online May 2023)”.

“It would be great to have access to an up to date database of Northland growers that details what is grown, the quantities and seasonal availability”

“Really loved the workshop and I would love to be able to work with local as it is part of our branding, I want to uplift not only Te Hiku but also other Maori and small business”

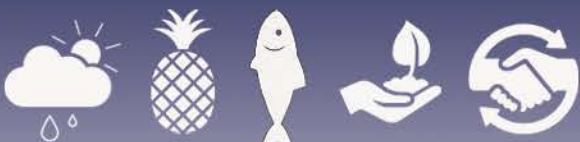
“We have year-round supply of large quantities of fruit. Our family-run business is handing over to the next generation so we are looking at ways to maximise value from what we produce”

“Lack of staff across all areas, of manufacturing, and at all skill levels is a major problem for the businesses we represent across New Zealand”

“I work for various businesses, all of which have a “shopping list” of priorities, to be able to connect each of these at the Innovation Park, gives the businesses a level playing field to be hands-on with each facet of their operations. I know of 2 who are already looking into a cyclic model rather than a stand alone approach to their ideas and future investment”

CONCLUSIONS

The food & beverage production sector is one of the most important economic drivers for Tai Tokerau...



4,000+

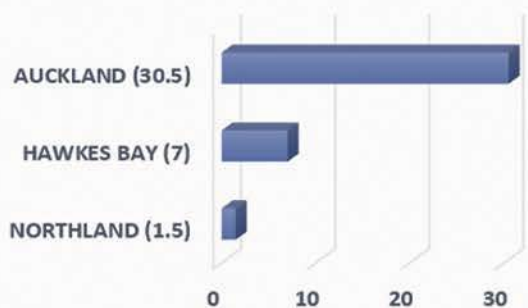
F&B operational units in Northland, primarily on-farm*.

10,000+

People employed in F&B in Northland both on-farm and in processing*.

BUT we are not currently realising our opportunity, especially in value-added manufacturing:

Processing jobs created per 10000 tonnes of raw material produced.*



*Data taken from the 2019 Coriolis Report: Regional Growth Opportunities in Employment in the Northland Food and Beverage Industry.

CHALLENGES

OPPORTUNITIES

NGAWHA INNOVATION & ENTERPRISE PARK



Many sectors are fragmented & people feel disconnected

Lack of core infrastructure. Distribution & logistics are problematic.

Many businesses lack scale & access to facilities that enable scaling-up.

Lack of staff at all levels of production.

Limited value-add manufacturing facilities & expertise in Northland.

A regional kai hub that enables connection & collaboration.

Potential for shared distribution networks.

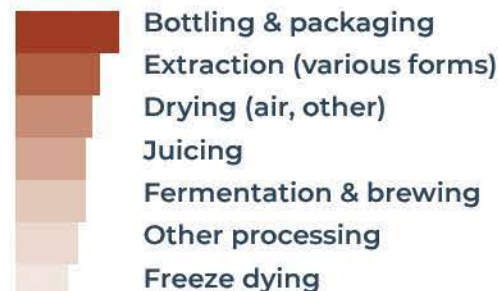
Large-scale Northland facilities to enable more commercial scale production.

Emerging local talent pool with national expertise for skills growth.

Purpose-built shared-use manufacturing facilities & scope to grow.

The combined social, collaborative and sustainable approach of the Ngawha I&E Park, alongside the established partnerships with the NZ Food Innovation Network, National Public Agencies, and National Science & Research Institutions is the leading point of difference that would attract businesses.

FACILITIES IN DEMAND



URGENCY FOR FACILITIES



SUPPORT SERVICES IN DEMAND FOR SUCCESS



NEXT STEPS

With the first stage of engagement now complete, this report is provided to key stakeholders and made available to all those who were involved, and others that may consider this proposition of use for their business.

Stage two of the project is focused on understanding the following information that will allow positive progress toward the next stage:

- Which businesses are **ready to be involved** with the next stage of planning?
- What **volumes** are businesses producing?
- What **frequency** are they needing to access manufacturing facilities.
- What is the preferred **access** to manufacturing capability (contract, own facilities etc)?
- What **physical layout** is required?
- What **support services are most required** for successful manufacturing outcomes?

Stage two of this project will begin immediately following the publish of this report, with the aim to having quantified answers to the questions above in the first quarter of 2023.

If you would like to contribute to the results of this research, you can do so by contacting the project manager: justine.stuart@northlandnz.com.

The aim is to have detailed design and commercial agreements in place for building consents and construction tenders to be underway by late 2023.

