

CREATING COLLABORATION

**Challenges and opportunities for
Auckland's food and beverage
manufacturing sector**

Auckland Unlimited report

- 1 Advanced Industries**
Auckland's Opportunity
February 2017
- 2 Auckland: An Emerging Knowledge Capital of Asia-Pacific**
March 2017
- 3 Convergence and Disruption:**
Auckland's Tech Opportunity
April 2017
- 4 Engaging Globally**
Auckland's Trade Linkages
June 2017
- 5 Growing Prosperity**
The Auckland Prosperity Index:
Challenges and opportunities
March 2018
- 6 Circular Economy**
A new dynamic for Auckland
businesses
May 2018
- 7 Future Ready Auckland**
Driving economic development
through technology and
transformation
June 2019
- 8 Pathway to Productivity**
Opportunities for sustainable
economic growth across Tāmaki
Makaurau
October 2019
- 9 Climate Change and Economic Recovery**
Challenges facing businesses
and using recovery to support
resilience
March 2021
- 10 Creating Collaboration:**
Challenges and opportunities for
Auckland's food and beverage
manufacturing sector
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Foreword

Food and beverage (F&B) manufacturing in Tāmaki Makaurau Auckland has unrealised potential.

One of the largest manufacturing clusters in New Zealand, it accounts for 30 per cent of the country's F&B manufacturing businesses, with 20,000 workers employed across more than 1000 businesses.

It has many of the attributes of an internationally significant cluster – including concentration of businesses and jobs, multinational companies, science and education institutions, and innovation infrastructure.

Clusters like this can be important drivers for regional innovation, productivity growth and international competitiveness.

With its value to Auckland's economic prosperity, and the benefits industrial clusters can offer individual industry players and the wider business ecosystem, Auckland Unlimited commissioned a research team from the University of Auckland Business School to study the region's F&B manufacturing sector.

The study showed Auckland's F&B manufacturing cluster is currently lacking in both collaboration and product innovation.

The analysis presented in this report is based on that study, which identifies barriers and

opportunities in these areas, how they affect sector growth, and how we move towards future success.

The study is an exciting collaborative exercise between Auckland Unlimited and the University of Auckland, forming part of a wider collaboration with other organisations in Tāmaki Makaurau striving to build a highly productive economy.

Auckland Unlimited shares insights to help our industries create a resilient and sustainable future. This is even more important in this time of economic recovery and reset. Auckland's F&B manufacturing businesses are well-positioned to leverage the high regard New Zealand-made products have internationally, with our high-quality ingredients, strict food quality and biosecurity measures, and our natural environment.

The purpose of this paper is to provide information and insights – change will need to be driven by and within the industry. Creating collaborative opportunities is crucial for Auckland's F&B manufacturers and the network of business support organisations that help facilitate local economic growth.



Pam Ford
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About the study

The study was commissioned and supervised by Auckland Unlimited¹. It was led by Dr Frank Siedlok, Dr Wender Martins, Nicholas Borroz and Hsiao-Chen Shen formed the rest of the research team.

It involved:

- a literature review to inform the study
- empirical research comprised of 31 interviews of experts and industry players
- a desktop analysis of the cluster literature and the prevailing market trends that affect the F&B sector locally and globally.

The study is part of a multi-phased project that also includes work done by Market Economics Consulting (Lawrence McIlrath) focusing on the assessment and development of F&B manufacturing clustering in Auckland.

The multi-layered nature of the analysis and recommendations in the study does not lean towards providing one single and simple solution to the sector's challenges. Instead, the identified issues and recommendations form a set of interconnected factors that require a holistic approach. Some of these are aimed at facilitating clustering in the F&B manufacturing sector in Auckland.

The conclusions and recommendations shared in this Insights report draw on the findings from this study. They are analysed through the lens of how they shape collaboration and innovation in the sector and fall under five main themes:



Developing collaborative capability within and between industries in the sector



Facilitating innovation in the F&B manufacturing sector in Auckland: Creativity and innovative IP-rich products



Provenance and sustainability in supply chains

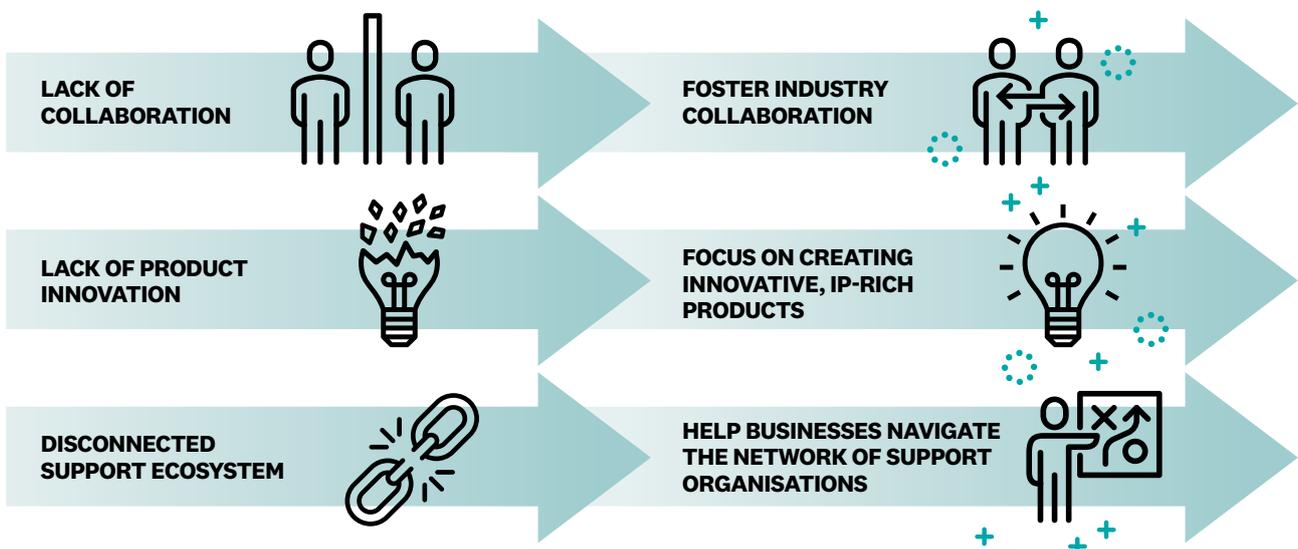


Business support ecosystem and research organisations: strategic focus and coordination



Global trends: implications and opportunities for New Zealand's F&B manufacturing sector

KEY OBSTACLES AND OPPORTUNITIES



1. Ryan Archibald and Konstantin Selitskiy



Clustering – creating collaboration and innovation

F&B manufacturing is a significant sector within Auckland’s economy, with almost 20,000 workers employed across more than 1000 businesses.

Auckland plays a critical role in the national food and beverage sector, accounting for 30% of all New Zealand F&B manufacturing businesses; 23% of all F&B manufacturing employees, and exporting more than 50% of its outputs.

However, as in many other sectors of New Zealand’s economy, productivity growth in F&B manufacturing has been consistently weak, adding to the general pressure on living standards and wellbeing in the country.²



20,000

WORKERS



1000

BUSINESSES



30%

OF NZ’S SECTOR EMPLOYEES

2. New Zealand Productivity Commission (2020). New Zealand firms: Reaching for the frontier. Draft report. Available at www.productivity.govt.nz

HOW CLUSTERS SUCCEED

Clusters are geographic concentrations of industries and associated institutions related by knowledge, skills, supply, demand, and/or other linkages.³

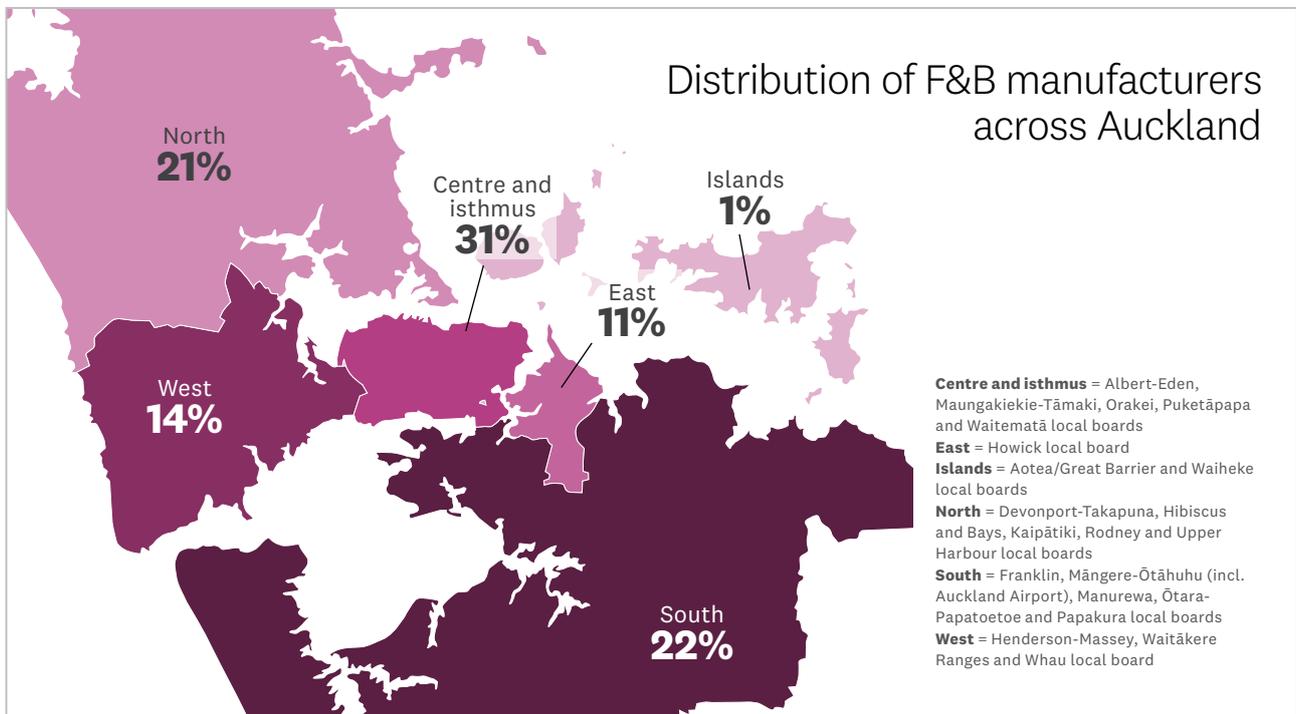
Despite similarities and shared characteristics of different industrial clusters, each location needs a tailored strategy and support. Some clusters grow and develop organically, for example a well-known F&B cluster in Boulder, Colorado (US)⁵. Others thrive due to support provided by various local players such as governments, universities and industry associations, which deliver bespoke support initiatives and infrastructure, as well as energise existing industry players and the networks that underpin innovation and entrepreneurship. Perhaps the most recognised example of this cluster type is Food Valley⁶, the thriving F&B cluster in Wageningen, Netherlands.

Common characteristics that underpin the success of the food clusters in Colorado and Wageningen are high levels of networking, high concentration of research, and global connectivity.

Although existing research suggests that many cluster initiatives fail, the examples where cluster support did succeed (such as Food Valley) suggest two key success factors:

Clusters can be major engines of innovation, productivity growth and quality jobs creation.⁴

- Firstly, energising clustering in particular sectors requires detailed understanding of their characteristics, key strengths and shortcomings in terms of networks, technologies and alignment with megatrends. It is not unusual that potentially innovative sectors remain under the radar, often due to outdated classification and reporting systems.
- The second stage is typically focused on engagement with stakeholders and developing shared goals through understanding of the main industry and technology trends, capability to recognise weak signals, building supporting culture based on cooperation⁷, knowledge sharing, and alignment of support initiatives and policies.



Source of data: Infometrics (2020)

3. Delgado, M, Porter M, Stern, S. (2014). Defining Clusters of Related Industries. Working paper 20375. National Bureau of Economic Research, Cambridge.

4. C. Ketels (2017). Cluster Mapping as a Tool for Development. Institute for Strategy and Competitiveness Harvard Business School. www.isc.hbs.edu

5. [Naturally Boulder](#) and [Colorado Bioscience](#)

6. Food Valley: www.foodvalley.nl

7. The act of cooperation between competing companies; businesses that engage in both competition and cooperation are said to be in cooperation.

Developing collaborative capability among industry players

New Zealand's F&B manufacturers face challenging market dynamics:

- A small market size with low population density
- A highly concentrated, duopoly-like grocery retail and foodservice distribution
- Small industry size (as a whole), with a large number of competing small and medium-sized enterprises (SMEs) and a few dominant multi-nationals (MNCs).

Operating in such an environment usually means that local businesses will struggle to grow, especially from the start-up stage. However, it also means that collaboration, especially between closely located companies, could be even more beneficial.

Collaboration can allow firms to reduce costs, increase volumes and manufacturing capabilities (through co-location, co-manufacturing, shared equipment, combined/volume purchases), increase sales in local and overseas markets (through combined marketing, sales and distribution), and therefore attain sustainable competitive advantage through, for example, co-funding of R&D, joint ingredient or IP development, or new product development.

Despite the many possibilities and potential benefits for F&B manufacturing companies, the study found little collaborative behaviour. There is also little evidence of formal collaborative structures such as joint ventures or contractual strategic partnerships.

BENEFITS OF COLLABORATION



REDUCE COSTS



INCREASE VOLUME



INCREASE SALES



**REACH OVERSEAS
MARKETS**



**NEW IP & PRODUCT
DEVELOPMENT**



COLLABORATIVE LOGIC

One of the key issues revealed in the study is the lack of ‘collaborative logic’⁸ among industry players. This means there is no shared system of norms, values, and capabilities to help industry players collaborate with each other. The networks currently in place (‘everybody knows everybody’) mean a general lack of trust or willingness to share knowledge, as most small and medium-sized businesses see collaboration as a threat to their know-how and competitive position. As a result, companies do not consider pooling resources to increase production capacity, even when the benefits of collaboration are obvious - for example in subsectors experiencing high growth in demand⁹.

The study identified four key reasons for this lack of collaborative logic:

- With little history of productive collaboration, there appears to be a lack of collaborative skills and structures. There is a lack of understanding about norms, values, capabilities, and the effective formal structures that can enable collaboration.
- Most F&B manufacturers focus on domestic markets, fueling high levels of rivalry¹⁰ that act as a barrier to collaboration and knowledge sharing.
- As opposed to larger overseas markets, sizable local F&B manufacturers and multinationals are not fully utilising their resources and capabilities to provide knowledge and capital to ignite collaboration within the sector, and for productive knowledge spillovers.¹¹



- The prevailing approach to regional economic development in New Zealand is for government and public institutions to focus on the reduction of obstacles to doing business over a more coordinative role, with little attempt to instigate collaboration.

Despite this general lack of collaborative skills and structures in New Zealand, a few subsectors have achieved positive outcomes through collaboration. One example is the kiwifruit industry, where a cooperative structure has successfully created a range of strategic levers.

Other pockets of collaboration within F&B manufacturing were identified, such as market and regulation knowledge-sharing within the pet food industry, collaborative sustainability projects within the seafood industry, and emerging collaborative research and development projects across various food and beverage subsectors. Some of these collaborations were brokered by existing business support organisations (for example Callaghan Innovation and New Zealand Trade and Enterprise), and these positive examples can be used to inform similar coordination efforts in the sector.

Collaboration requires both capabilities and willingness, and both are currently underdeveloped in the Auckland region and New Zealand. There is a clear need to encourage and support the development of skills and willingness to collaborate.

8. ‘Collaborative logic’ is a theoretical concept used in the study.

9. For example, the pet food subsector.

10. Please note that rivalry and competition are not the same concepts here: rivalry reduces proclivity to collaborate, while competition can lead to collaboration.

11. F&B MNCs in New Zealand do engage in acquisitions of start-ups as a way to add innovative products to their product portfolios. However, compared with the VC role MNCs play in other markets, these dynamics remain relatively underdeveloped in New Zealand. There is also limited evidence of knowledge spillovers from large research projects commissioned by MNCs and conducted by local research institutes or universities – usually the benefits of such research are not accessible to other sector players.

RECOMMENDATIONS FOR ENHANCING COLLABORATIVE CAPABILITY

- 1** Bring businesses of various sizes (MNCs, large local firms, SMEs and start-ups) together to decide, collectively, what kind of collaboration initiatives they would be willing to participate in. Business support organisations can facilitate collaboration by assisting in the establishment of the rules of engagement between players and providing legal advice.
- 2** Businesses work together to create shared goals and shared focus to align multiple stakeholders with sometimes competing agendas. Shared focus could be on provenance, sustainability in supply chains, export, packaging, or on a cluster initiative.
- 3** Consider strengthening or creating a clear strategic focus on shared goals to enable clustering. Focus initially on a few specific areas such as sharing equipment, joint overseas market entry, the circular economy, or food sustainability. Tackling a shared issue can help align goals, overcome rivalry, and facilitate collaboration. Over time, these collaborations will lead to more complex ones such as co-manufacturing, co-funding of R&D, and joint ventures.



Creativity and innovative IP-rich products

In general, most new products developed by both local and Auckland-based MNCs are adapted or enhanced versions of products that already exist in overseas markets. In most cases, New Zealand F&B manufacturers are following trends rather than leading them - their products will be new to New Zealand but not new in a broader global context.

BARRIERS TO INNOVATION

A small domestic sector

A relatively small domestic F&B manufacturing sector, coupled with highly networked industry relationships, can make it difficult for new participants to successfully enter the market and to access expertise to both develop new innovative products and grow quickly. This is further compounded by having a small talent pool with the highly specialised knowledge required for new product development. Additionally, insufficient capacity - and therefore lack of competition in contract manufacturing - leads to high costs that often inhibit product innovation.

The study has highlighted challenges in product innovation in New Zealand's F&B manufacturing sector, with recognition among industry players that they prefer to 'play it safe' when developing new products.

Pricing and production

The main challenge for F&B manufacturing SMEs in the domestic market is consolidated retail and distribution channels, which can often lead to challenging pricing and volume negotiations. This means F&B entrepreneurs find it very difficult to gradually scale-up production and increase sales with a niche or highly innovative product. This can create a self-perpetuating cycle where access to distribution becomes limited, as only a small pool of consumers would be willing to pay a premium. These unique market dynamics highlight a structural problem for promoting innovation and entrepreneurship in F&B manufacturing.

Short-termism

Fast-paced industry dynamics lead to short-termism and it is one of the most significant barriers to creating truly innovative products. For most SMEs the time and cost of R&D make it too challenging to engage in more substantive research.

Manufacturing processes

The complexity and costs involved in the manufacturing process for new innovations can vary significantly and can considerably impact the financial viability of a specific product innovation. Process innovations could include new manufacturing processes, ingredient development or sourcing, and packaging. Small businesses do not usually have the internal resources and capabilities to deal with process innovations that require frequent collaboration with third parties such as suppliers of manufacturing equipment, contract-based food technologists, contract manufacturers, and ingredient suppliers.



RISK AND REWARD

Short-termism and a lack of highly innovative and creative product development are not exclusive to SMEs; they are also prevalent in large local F&B manufacturing companies and New Zealand-based MNC subsidiaries. This is despite having superior resources and capabilities, access to knowledge of demand in overseas markets, and more access to capital for large investments in process innovations.



Short timeframes, the need to deliver fast returns on investment, and highly structured new product development processes designed to eliminate risk, all ultimately prevent the creation of bolder innovations.

Conversely, large manufacturers - being opportunity driven - compensate for their apparent conservativeness in new product development with acquisition and IP commercialisation strategies to gain access to innovative products. As a result, they can develop, produce, and sell more products, and be competitive and profitable in both local and international markets.

Lack of product innovation potentially reduces both

competitiveness and the likelihood the product could be successful in overseas markets, simply because local companies already have similar products with established brands and customer bases. This lack of innovative thinking and originality can also impede SMEs in engaging in collaborative product innovation - because adapting, rather than innovating, creates higher levels of rivalry among businesses as price, not product, becomes the differential in the marketplace.

RECOMMENDATIONS FOR CREATING INNOVATIVE IP-RICH PRODUCTS

- 1 Support initiatives and training programmes such as resource pooling, contract manufacturing and exposure to best practices. Such programmes encourage innovative business models and creativity, increase productivity, and reduce risk, especially for SMEs.
- 2 Consider incentives to attract more overseas-based venture capital to the sector in Auckland.
- 3 Increase the presence and activity of highly innovative F&B manufacturing technologists and business development consultants from New Zealand and overseas.
- 4 Enable easier access to the emerging and most recent food trends and developments to facilitate discussions within the sector. Incentivise local research organisations to work together to inform SMEs and start-ups about the future 'hot topics' and IP opportunities.
- 5 Consider supporting the development and commercialisation of IP, rather than just products. There is scope to consider a collaborative approach that could support research in the field of functional foods derived from New Zealand ingredients.
- 6 Some New Zealand companies have successfully leveraged the increasing demand for a closer link between health and nutrition. This strategy could be promoted across the food system in Auckland, but the research needs public support for smaller players.

Provenance and sustainability in supply chains

Many Auckland F&B manufacturers benefit from our country's clean and green image and use the 'provenance strategy' to fortify their competitive advantage in some foreign markets. However, the study identified several inefficiencies and potential risks that could undermine those approaches in the long term.

SUPPLY CHAINS

The majority of local F&B manufacturers have not established strong and stable links with local suppliers. Consequently, they may have limited leverage over the quality and consistency of supplies to reliably produce high quality products with genuine New Zealand provenance. Similar tensions and potential risks are present in the claims related to sustainability and the 'clean green' image of New Zealand.

Weak links with suppliers make F&B producers susceptible to price fluctuations and changes in availability of materials due to international competition. Those dynamics further undermine the potential for F&B manufacturers to capitalise on high-value products and provenance strategy.

PROVENANCE CLAIMS

With a significant proportion of ingredients being imported and then locally processed and exported, there is a potential risk of some producers attempting to capitalise on New Zealand's brand by adding only one or two local ingredients and claiming New Zealand origin. This could lead to reputational damage to the Made in New Zealand brand. While the central government is well-positioned to protect provenance claims via regulations and controls imposed by the Ministry of Primary Industries (MPI), more stringent regulations in grey areas may be needed.

REGULATIONS AS AN OBSTACLE

Although MPI and other organisations are largely monitoring and enforcing compliance effectively, the study identified that stringent government regulations and enforcement can in fact be a significant hurdle for F&B SMEs. Some regulations may limit opportunities to capitalise on the uniqueness and quality of local and fresh ingredients.

TRANSPARENCY

Provenance strategy is often combined with the 'clean and green' image and New Zealand Inc. brand. Often this narrative lacks transparency and evidence that clearly support those claims.



RECOMMENDATIONS FOR SUPPORTING PROVENANCE AND SUSTAINABILITY IN SUPPLY CHAINS

- 1 Initiate discussions between F&B manufacturers and their primary industry suppliers to better understand how their relationships could be strengthened and commercial transactions could be better insulated from international price fluctuations.
- 2 Promote discussions among policymakers to create specific regulations (e.g. minimum content) for products to be allowed to claim New Zealand origin. Alternatively, introduce a voluntary labelling system that ensures specific qualities or processes.
- 3 Together with industry players, investigate how to improve transparency and traceability from farm to a factory warehouse.
- 4 Investigate and discuss with industry how higher levels of sustainability can be achieved within the sector and how this can be leveraged to encourage collaboration and innovation.
- 5 Begin working on developing highly recognisable territorial trademarks¹² underpinned by strict ingredient requirements, process controls, and traceability.
- 6 Connect with and align to te ao Māori principles, including kaitiakitanga (guardianship) to strengthen sustainability principles and processes, and ultimately provenance narratives. This is consistent with increasing acknowledgement, adoption and prominence of te ao Māori values by New Zealand businesses.

12. For example, the IGP and other geographical trademarks in Italy.



Support and research organisations: strategic focus and coordination

The F&B manufacturing sector in Auckland benefits from the rich network of support and research organisations that exist in New Zealand, with The FoodBowl¹³, Callaghan Innovation, and New Zealand Trade and Enterprise being reported as the most prominent in the Auckland region.

The study has shown there is limited understanding of what each of these organisations could do for companies in the sector. The levels of actual utilisation of (and satisfaction with) these organisations' services vary considerably between businesses of different sizes and levels of maturity.

A DISCONNECTED SUPPORT ECOSYSTEM

In line with the findings in the latest report by the New Zealand Productivity Commission¹⁴, the study identified that while there are many supporting organisations and support services available for F&B manufacturers in Auckland, there is insufficient collaboration between them.

There is also a lack of clarity as to 'who is who' and how to access services among businesses. F&B manufacturing SMEs, particularly start-ups, find it hard to navigate the complex landscape of these support systems and understand how support services can, when combined, help them grow.

Importantly, supporting organisations typically treat each business as an individual entity. This neither encourages collaboration between businesses nor helps to foster the idea that collaboration can be beneficial to all parties involved - including between direct competitors.

ACCESS TO INFORMATION

There is a serious need for Auckland's F&B manufacturers to have access to timely, industry-specific market and technical information. While a few of the companies in the study were aware of the leading market intelligence, the cost of accessing such reports (as well as their complexity) was seen as a barrier for most.

The business support ecosystem is best positioned to help businesses gain access to this kind of intelligence, which can also offer a platform to expose companies to potential collaborative opportunities. It is important to note that industry-specific market and technical information needs to not only be provided, but also curated and 'translated' for specific groups.



13. The FoodBowl was co-founded by Auckland Tourism, Events and Economic Development (predecessor of Auckland Unlimited) 10 years ago to support innovation in F&B manufacturing and has proved to be a successful venture and an important asset for the support ecosystem. It is part of the NZ Food Innovation Network, a national network of science and technology resources created to support the growth of food and beverage businesses. The FoodBowl provides both facilities and expertise for research and development of new products and processes, pilot scale and commercial runs for both local and export markets.

14. New Zealand Productivity Commission (2021). New Zealand firms: Reaching for the frontier. Final report. Available at www.productivity.govt.nz/inquiries/frontier-firms/

BUILDING A CONNECTED ECOSYSTEM

CURRENT STATE

- Thinly spread funding
- Uncoordinated and fragmented support
- Weak industry-research connections
- Little evidence of impact

GOVERNANCE & IMPLEMENTATION

- Senior leadership
- Consolidation of existing supports
- Shared decision making
- Independent monitoring and evaluation

FUTURE STATE

- Significant long-term investment in focus areas
- Coordinated effort across government
- Researchers, industry Māori and government working together
- Transparent, adaptive implementation

Adopted from: Crawford, Ron (2021) Focused innovation policy: Lessons from international experience [NZPC Working paper No. 2021/03]. NZPC. Available from www.productivity.govt.nz

RECOMMENDATIONS FOR SUPPORT AND RESEARCH ECOSYSTEM

- 1 Develop an industry-specific knowledge-sharing platform to assist entrepreneurs in finding information and support relating to food technologies, available equipment and research, a directory of consultants, contract manufacturers, and suppliers of ingredients.
- 2 Ensure the provision of timely, industry-specific market and technical information, curated and translated in a way that all businesses can understand and use it.
- 3 Use the existing support and research organisations ecosystem to help build collaborative behaviour between businesses by changing the way they engage with the industry. Instead of prioritising one-to-one interactions with business clients, support organisations could create or replicate initiatives to facilitate collaborative behaviour - for example, making access to certain resources conditional on partnering/ collaboration. More flexible pricing structures for supporting services could be further combined with other incentives to foster collaboration.
- 4 Consider a more coordinated approach that allows for cost and resource sharing or strategic partnerships that help small businesses to start exporting.





Trends and opportunities for Auckland's F&B manufacturing sector

Global trends create a range of threats and opportunities for the Auckland food and beverage sector. Some of the most important are climate change, political and trade instability, and changes in diet and nutrition around the world.

- Extreme weather events like heat waves, droughts and floods pose increasing risks to the world food system. Pressure on food production and security means Auckland and New Zealand need to reconsider the structure of the primary sector and how it uses resources to maximise value per hectare.
- Customers increasingly consider sustainability when making purchasing decisions, such as biodegradable or recycled packaging and whether ingredients are sustainably produced or organic.
- While a growing middle class in Asia generates a relatively strong demand for food produced in Auckland, longevity is not guaranteed as their local food production systems mature. A more nuanced strategy and diversified market approach that targets distinct demand attributes (for example, health) needs to be considered.
- The recent trade wars and the COVID-19 pandemic have highlighted the risks and volatilities inherent to global supply chains. Governments are willing to support local food producers to enhance domestic food sovereignty and forward-looking companies are already de-risking their dependence on a single market or supplier. For Auckland and New Zealand, current overreliance on only a few export markets warrants developing a more diversified export strategy.
- There is wide societal recognition of nutrition-sensitive approaches to managing health, which has triggered a shift away from focusing on simply maximising the quantity of food towards improving diet quality, diversity, and accessibility.
- A growing preference for less processed foods aligns closely with innovation and new technological developments, favouring alternative highly nutritious foods and supplements such as nutraceuticals, functional foods and alternative proteins. Customers are becoming more demanding and sophisticated in terms of scientific evidence that supports health and nutritional claims.

IMPLICATIONS AND RECOMMENDATIONS

- 1 By producing very large volumes of food for exports, New Zealand is increasingly straining local ecosystems and some sectors are reaching growth limits. There are increasing calls¹⁵ to reconsider the structure of the primary sector and focus on innovation in food and nutrition.
- 2 Through implementing appropriate policies and technologies to ensure quality, traceability and transparency, Auckland F&B manufacturers can position themselves as leaders in sustainable food production and as guardians of the land.
- 3 The rift in global trade highlighted the dangers of over-reliance on just a few markets or suppliers. The Auckland F&B manufacturing sector should be encouraged to take a more diversified market approach and to develop strategic partnerships across developed countries in Europe, Asia, Americas and MENA.
- 4 Auckland F&B manufacturers should actively work on developing strategic partnerships with other local businesses in their export markets that can contribute to lifting innovativeness, technology transfer and learning.
- 5 The shift towards health and nutrition opens new opportunities for Auckland F&B manufacturers. They need to target a wider range of overseas markets, especially in South East Asia.
- 6 Although the 'eat less, but better' shift presents new opportunities to enter the higher-value market niche, more scientific evidence and appropriate technological development will be needed. There is scope to consider a cross-Auckland collaborative approach that could support research in the field of functional foods derived from New Zealand ingredients.

15. The Primary Sector Council suggests that New Zealand should position itself as a leader in sustainable food production and as a guardian of the land. fitforabetterworld.org.nz/our-vision/

Similar sentiments are contained in the recent Green Protein Report (De Boo and Knight (2020). The Green Protein Report). This approach also aligns with a steady trend in New Zealand business towards increasing prominence of Māori values (Spiller et al. (2010). Relational Well-Being and Wealth: Māori Businesses and an Ethic of Care).



Improving collaboration and product innovation will require industry players to join forces and drive change. For our food and beverage manufacturers to grow and innovate, they will need to work more closely with each other, and with New Zealand's network of support and research organisations.

If you have feedback or questions on the contents of this report, please get in touch.

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