

Prepared by the Economic Division in Wellington

Key Points

- Hawke's Bay is New Zealand's 9th largest source of economic activity, and makes up 3% of total GDP.
- In 2019, \$5.0 billion (4%) of New Zealand's total goods trade was via the Port of Napier.
- The region's exposure to export dependent jobs is high (nearly one third of employment is in the export sector).
- Hawke's Bay is the sixth largest exporting region in New Zealand, with \$3.1 billion (21%) of its regional gross output exported.
- Hawke's Bay is the 9th largest intermediate-input importing region in New Zealand. It sources \$1.0 billion intermediate inputs internationally (13% of its total inputs).
- The Hawke's Bay is heavily reliant on the EU, Australia and China both for exports and importing intermediate-inputs.

Insights

Hawke's Bay is New Zealand's 9th largest source of economic activity, contributing \$6.6 billion in GDP and making up 3% of total GDP. Private services contribute the most to regional GDP (25%), followed by primary food exports (23%), health (7%) and essential retail and wholesale (7%).

In 2019, \$5.0 billion (4%) of New Zealand's total goods trade was via the Port of Napier. The Port of Napier received \$1.0 billion imports (2% of New Zealand's imported goods) and was the point of departure for \$4.0 billion exports (7% of New Zealand's exported goods). Key exports via the port of Napier are meat, fruit, and wood and pulp.

Hawke's Bay accounts for 4% of New Zealand's national employment. The largest employer by industry group is primary food exports (22%), followed by private services (22%), health (11%) and education (8%).

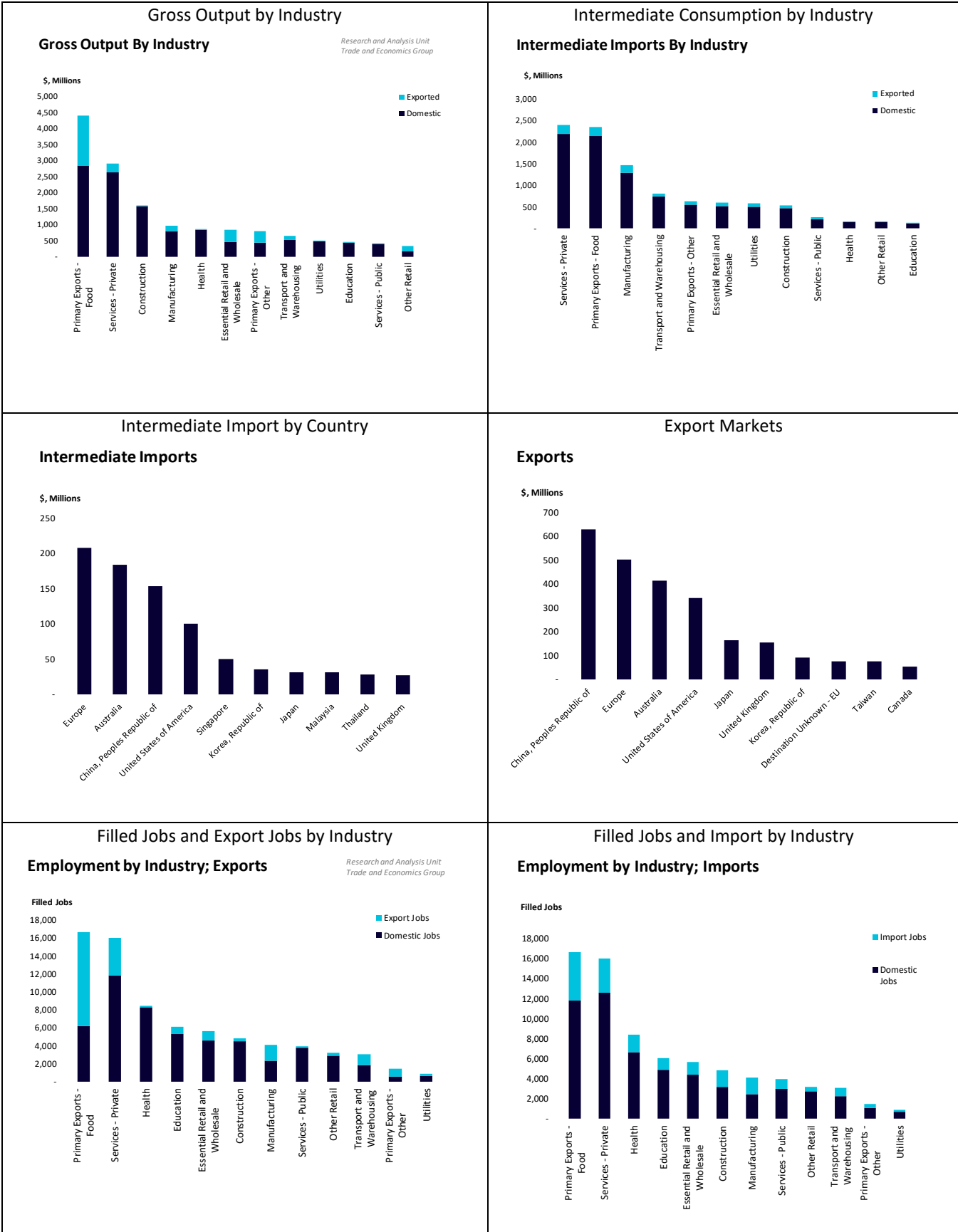
Nearly one third of the Hawke's Bay's employment is in the export sector (29%). The industry with the highest proportion of export-orientated jobs is other primary exports (63%), followed by primary food exports (63%), manufacturing (45%) and transport and warehousing (40%). In comparison to the other 16 regions in New Zealand, the Hawke's Bay has the 4th largest proportion of export-orientated jobs to labour market composition.

Hawke's Bay is more reliant on exporting jobs (29.2%) compared to importing jobs (25.2%).

We estimate that \$3.1 billion (21%) of Hawke's Bay's regional gross output is exported. In comparison to other regions, Hawke's Bay is the sixth largest exporting region. It sits above Waikato, but below Marlborough.

Hawke's Bay imports \$1.0 billion intermediate inputs (13% of total inputs). In comparison to other regions, the Hawke's Bay is the 9th largest intermediate input importer. It sits above Nelson, but below Taranaki.

The largest intermediate input importing industry is private services (20%), followed by primary food exports (19%), manufacturing (17%) and other primary exports (7%). The EU, Australia, China, the USA and Singapore are the five largest sources of intermediate inputs for the Hawke's Bay. Together they account for 67% of the Hawke's Bay's imported intermediate consumption.



Source: Sense Partners, Stats NZ

Note: There is no official trade data by region. In this note we use a novel data set created by Sense Partners for MFAT to link regional gross domestic product by industry to exports. These are our best estimates of exports from the region. Due to data limitations the estimates refer to the year to June 2018. For a non-technical summary of the methodology see [MFAT Analytical Report Industry Exposure to Trade](#).

ANNEX: INDUSTRY AGGREGATIONS

Category	Industry Grouping	Industry
Key Exporters	Primary Exports - Food	AA11. Horticulture and fruit growing
		AA12. Sheep, beef cattle, and grain farming
		AA13. Dairy cattle farming
		AA14. Poultry, deer, and other livestock farming
		AA31. Fishing and aquaculture
		AA32. Agriculture, forestry, and fishing support services and hunting
		CC11. Meat and meat product manufacturing
		CC12. Seafood processing
		CC13. Dairy product manufacturing
		CC14. Fruit, oil, cereal, and other food product manufacturing
		CC15. Beverage and tobacco product manufacturing
	Primary Exports - Other	AA21. Forestry and logging
		BB11. Mining
		CC31. Wood product manufacturing
CC32. Pulp, paper, and converted paper product manufacturing		
Essential Services	Health	QQ11. Health care and social assistance
	Essential Retail and Wholesale	FF11. Wholesale trade
		GH11. Motor-vehicle and motor-vehicle parts and fuel retailing
		GH12. Supermarket, grocery stores, and specialised food retailing
	Transport and Warehousing	II11. Road transport
		II12. Rail, water, air, and other transport
		II13. Postal, courier, transport support, and warehousing services
	Utilities	DD11. Electricity and gas supply
		DD12. Water, sewerage, drainage, and waste services
		JJ11. Information media services
		JJ12. Telecommunications, internet, and library services
	Recovery Phase	Non-Primary Manufacturing
CC41. Printing		
CC51. Petroleum and coal product manufacturing		
CC52. Basic chemical and chemical product manufacturing		
CC53. Polymer product and rubber product manufacturing		
CC61. Non-metallic mineral product manufacturing		
CC71. Primary metal and metal product manufacturing		
CC72. Fabricated metal product manufacturing		
CC81. Transport equipment manufacturing		
CC82. Machinery and other equipment manufacturing		
CC91. Furniture and other manufacturing		
Construction		EE11. Building construction
		EE12. Heavy and civil engineering construction
		EE13. Construction services
Education		PP11. Education and training
Other Retail		GH13. Other store-based retailing and non-store retailing
Services - Private		GH21. Accommodation and food services
		KK11. Finance
		KK12. Insurance and superannuation funds
		KK13. Auxiliary finance and insurance services
		LL11. Rental and hiring services (except real estate)
		LL12. Property operators and real estate services
		MN11. Professional, scientific, and technical services
		MN21. Administrative and support services
		RS11. Arts and recreation services
		RS21. Other services
Services - Public		OO11. Local government administration
		OO21. Central government administration, defence, and public safety

Note: The aggregation of industries into Industry Groupings is solely for analytical purposes.

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