Ensuring our transport system helps New Zealand thrive
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For more information about vehicles and travel check out the research section of the Ministry of Transport website.
Transport and trade report

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Introduction

The New Zealand economy is heavily dependent on international trade, and greater achievement in global markets is critical to increasing economic growth and lifting our living standard.

A key barrier to New Zealand’s success is its geographical remoteness and distance from world markets. As a trading nation we are further from our markets than any other OECD country. This means that our exporters have a significant cost and time disadvantage to make up every day their goods travel. In 2009 the World Bank noted that, in terms of sea freight, every day away that a country is from its trading partners means a one percent reduction in probability that its trading partners will purchase goods from that country.

Recent OECD research\(^1\) commissioned by the New Zealand Productivity Commission suggests that weak international connections are a key issue. This research estimates that over half of New Zealand’s productivity and income gap relative to the OECD can be explained by geographical disadvantage.

We cannot physically move New Zealand closer to its markets but we can continuously strive to improve the efficiency of New Zealand’s international freight routes. An initial step in doing this is to monitor New Zealand’s international freight movements. By providing information about the volume, value, commodity mix, destination, freight mode and freight routes we equip market participants with some of the information they need to improve efficiency.

This annual report provides insights into New Zealand’s international freight movements, and provides recent trends and an overview of the key results for 2015. It is based on a data source that Statistics New Zealand and Customs have developed, which splits New Zealand’s international sea freight into bulk and containerised.

To enable comparison over time, the trade values have been converted to real 2015 dollars\(^2\). The export values are “freight on board” (FOB) and the import values are “cost, insurance and freight” (CIF).


More detailed freight information, particularly on container freight and domestic rail freight is available online from the Ministry of Transport’s Freight Information Gathering System (FIGS) reports.

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\(^1\) http://www.productivity.govt.nz/working-paper/an-international-perspective-on-the-new-zealand-productivity-paradox

\(^2\) The conversion is done using the Statistics New Zealand Import and Export trade price series OTP010AA and OTP025AA.
2015 Transport and trade highlights

Trade volume

Bulk exports dropped in 2015. Most of the reduction was in coal and logs. Air trade volumes are very low relative to sea, but as shown in the next two graphs they account for significant trade value.

![Sea volume (tonnes 000)](chart)

![Air volume (tonnes 000)](chart)

Trade value

Sea export value had increased with the growth of dairy and wood exports, but the prices for those commodities dropped in 2015. Import value remains relatively flat.

![Real export value ($m)](chart)

![Real import value ($m)](chart)

Containerised and bulk sea exports

Despite the increases in bulk export tonnage, the majority of sea export value is still containerised cargo. The large increase in bulk exports has not resulted in substantial value growth, as much of the expansion has been logs which are a low value product.

![Sea export volume (tonnes 000)](chart)

![Real sea export value ($m)](chart)

Sea export destinations

Bulk sea exports to China have grown significantly, but they dropped in 2014 and 2015 as log and coal volumes fell away. Much of the growth in containerised exports has been to the Chinese market.

![Bulk sea exports (tonnes 000)](chart)

![Containerised sea exports (tonnes 000)](chart)

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Confidential trade data

The organisations that provide the trade data this report is based on can have its detailed release limited under the Statistic NZ Act.

This means all we know about some sea cargo is whether it was transported by sea or air, but not what it was or whether it was containerised or bulk. Confidential trade data eventually becomes non-confidential. That takes 12 or 24 months typically.

Exports from the Port of Tauranga have been particularly affected by this mechanism. Port of Tauranga total export tonnage in 2015 was 12.75 million tonnes and of that almost 2 million is confidential. For the purpose of this report that cargo has been combined with the bulk category (increasing it from 6 to nearly 8 billion tonnes). The very low value of this unknown cargo (under $100 per tonne) suggests this approach is appropriate.
Section 1: Air and sea trade in 2015

Almost all of New Zealand’s imports and exports travel by sea but the picture is different when value is considered.

In 2015, the tonnage exported by air was 0.3% of exports but it made up 14.8% of export value. Only 0.5% of imports travelled by air but they made up 21.8% of import value.

31% of sea trade tonnage was containerised and made up 73% of sea trade value. Import containerised value was four times higher than bulk import value per tonne, and containerised export value was ten times higher than bulk export value per tonne.
Section 2: Sea trade trends

2.1 Key trends

- Sea export volume dropped in 2015 – bulk coal and logs dropped by more than the increase in containerised cargo (also see figures 2.2.3g and 2.2.3i)
- Sea export value dropped as dairy prices fell (also see figure 2.2.1b)
- The volume exported to China has dropped (see figure 2.2.2a)

2.1.1 Export trends

Export volumes dropped in 2015. The reduction was mainly due to the reduction in bulk log and coal exports (see figure 2.2.4a). Containerised freight export volumes increased even though dairy volume growth slowed (see figure 2.2.5a). Since 2008 sea export volume has increased 43%, and real value 4%.

The value per tonne of containerised exports has dropped to about $2900/tonne as dairy prices have fallen, while the average value of bulk exports has dropped to under $350/tonne as log volumes have increased.
2.1.2 Import trends

Bulk import value dropped in 2015 as the price of oil fell.

Containerised import value increased in 2015 even though volume was down, which reflects the lower NZ dollar (see figures 2.3.5a and 2.3.5b).
2.2 Exports

2.2.1 Export commodities

Between 2000 and 2015 the tonnage of sea exports, other than forestry products, grew by 21%. Forestry product exports grew by 122%.

The tonnage of dairy and food exports grew by 61%, but their real value grew by 116%. They made up 21% of export tonnage in 2000 and 21% in 2015. The value in 2000 was 56% rising to 67% in 2015.

Forestry products grew from 44% of volume to 59%, but dropped from 14% of value to 11% between 2000 and 2015. From a transport perspective, a lot of transport activity is required for a relatively low but significant export return.
2.2.2 Export destinations

The dominant trend in exports has been growth in the Chinese market. Tonnage to China has increased substantially (up 110% from 2009 to 2015), with more limited growth into South Asia (the countries around the Indian ocean). At the same time export tonnage to North Asia has been dropping.

The largest markets by value are China and Australia (they made up 36% of real export value in 2015), followed by North Asia, South-East Asia and North America. The value exported by sea to China has been rising rapidly, but not as fast as tonnage.

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**Fig 2.2.2a Sea export volume (tonnes 000)**

**Fig 2.2.2b Real sea export value (Fob $m)**

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2.2.3 Export commodities and destinations

This section analyses the patterns of seven major export commodities from 2005. The commodities analysed are meat, dairy, vegetables and fruit, foodstuffs, coal, oil and logs. They have been selected as they make up over 70% of the sea trade volume and value.

The graphs that follow show that the most significant changes have been the increases in log volumes and dairy value.

Substantial volumes of meat (around 50% in 2015) are exported to our traditional markets (Australia, Canada, USA and Europe). Meat exports to China have grown significantly in recent times.
Dairy exports show a different pattern. The three largest markets are China, Southeast Asia and the Middle East.

Australia, North Asia, South East Asia and Europe are the largest markets for fruit and vegetables.

Australia is the largest market for other food (which includes wine and fish).
Coal export volumes continue to drop. The largest coal market is South Asia (India), and the second largest North Asia. Demand from China is now at a very low level.

Oil exports are now almost entirely to Australia.

China is by far the largest market for log exports, but North Asia also takes a significant volume. Chinese demand dropped slightly in 2014 and 2015.
2.2.4 Bulk exports

Bulk volumes, apart from logs, have been dropping since 2012. Much of the drop has been in coal exports. Log volumes also dropped in 2015. Logs and wood chips are low value commodities, and made up 70% of bulk export volume and 27% of value in 2014.

New Zealand’s bulk exports (which are typically lower value) tend to travel to markets that are closer – Australia, China and Asia. The market that has grown the most is China.
2.2.5 Containerised exports

In 2015 meat, fish, dairy, vegetables, fruit and foodstuffs made up 57% of containerised volume, and 72% of containerised value. Much of the containerised volume growth has been in dairy products. Unlike bulk exports, containerised exports travel to a wide range of markets. More containerised exports go to North America and Europe than bulk exports. The market that has grown the most is China (containerised tonnage up 65% since 2008).
2.3 Imports

2.3.1 Import commodities

Oil is our largest import by sea, both in terms of volume and value. Vehicles, machinery/electrical, chemicals and food make up most of the remainder of import value. Also see Section 2.3.3.

The split of import value across the commodities has not been changing greatly, except for oil. The volume of oil imported has not changed greatly.

2.3.2 Import origins

The origin of our imports has diversified a little. Oil from Australia has been replaced by oil from Singapore (South East Asia in the graphs that follow) and the Middle East. The value of imports from China is increasing.
2.3.3 Import commodity origins

This section analyses the origins of six major imports (food, oil and coal, metals, chemicals/plastics/rubber), machinery and vehicles). These commodities have been selected as they make up most of the sea import volume and value (both over 80% in 2015).

Most of our food imports originate in South East Asia and Australia.

Our oil and coal imports are from South East Asia (oil from Singapore) and the Middle East.
Chemical imports come from a variety of sources, Australia, Asia and the Middle East are the largest suppliers.

Metal imports are predominately from China, Australia and Asia.

Machinery imports from China have been growing, and China is now our largest source.

Vehicle imports are predominately from North Asia (Japan and Korea). Europe is also a significant source.
2.3.4 Bulk imports

New Zealand’s bulk import value is mainly oil and vehicles.

![Bulk import volume (tonnes 000)](chart1)

![Real bulk import value ($m)](chart2)

![Value of bulk imports by origin (real $m)](chart3)

Much of our import value originates from North Asia (the major source of our new and used vehicles) and South East Asia (much of our oil imports).
2.3.5 Containerised imports

Containerised imports are far more varied than the bulk imports. Machinery and electrical equipment, foodstuffs and chemicals make up half the value.

Fig 2.3.5a Containerised import volume (tonnes 000)

Fig 2.3.5b Real containerised import value ($m)

Our containerised imports show a decline in the value coming from Australia, and an increase in value from China.

Fig 2.3.5c Value of containerised imports by origin (real $m)
2.4 Port activity

Bulk export tonnages through North Port, Tauranga and Gisborne, and containerised export tonnage through Tauranga, have increased the most. The effect of the Auckland industrial action in 2012 can be seen in the Tauranga and Auckland containerised volumes, and the decline in coal can be seen in Lyttelton in 2015.
Bulk export value has only increased slightly (also see 2.1.1) although there is some variation between the ports.

Fig 2.4b Real bulk export value ($m)
Containerised export value has been growing (also see 2.1.1).

**Fig 2.4c Real containerised export value ($m)**

<table>
<thead>
<tr>
<th>North Port</th>
<th>2010</th>
<th>2012</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ports of Auckland</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Taranaki</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Ports of Wellington</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Port of Napier</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Port of Taranaki</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Port of Masterton</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Port of Nelson</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Port of Lyttelton</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Port of Cargill</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Nelson Port</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Primeport Timaru</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
<tr>
<td>Port of Otago</td>
<td>2010</td>
<td>2012</td>
<td>2014</td>
</tr>
</tbody>
</table>
Bulk import tonnages have been increasing, as have containerised import tonnages in Tauranga and Lyttelton.

Fig 2.4d Import volume (tonnes 000)

- North Port
- Ports of Auckland
- Port of Tauranga
- Port of Napier
- Port of Taranaki
- Port of Nelson
- Port of Timaru
- Port of Otago
- South Port

[Graph showing import volume from 2010 to 2014 for each port, with blue bars for bulk and red bars for containerised imports.]
North Port and Ports of Auckland process the majority of bulk imports. The value imported through North Port corresponds to the price of crude oil, and value through Auckland is related to new and used vehicle numbers.

Fig 2.4e Real bulk import value ($m)
Over half our containerised import value enters NZ in Auckland, though some is immediately transhipped to other ports (see section 2.6).

The containerised import value per tonne is higher through Auckland than the other major ports.

- Ports of Auckland
- Port of Tauranga
- Port of Napier
- Centreport
- Lyttelton
- Port Otago
2.5 Container transhipments

The Statistics New Zealand data used in this report shows the port of exit for exports, and entry for imports. But some containerised exports are transhipped from another port, before export. That results them being counted against the export port rather than the original port. Typical movements are Nelson-Tauranga-export and Napier-Tauranga-export.

The converse happens on imports. Some containers are shipped from the NZ port where they were discharged at to a second port. Though the cargo is for the second port it is counted against the first one. A typical movement is an Auckland-Lyttelton-import.

The container movement data provided by the ports (for the Freight Information Gathering System or FIGS) provides information on the extent of transhipments.

2.5.1 Export transhipments

If a transhipped container is regarded as being exported from the originating port, then the FIGS\(^3\) containerised export tonnages would change as shown below. For instance Tauranga would be credited with 13% fewer containerised export tonnes, and Nelson with 78% more.

### 2014 containerised export and export transhipment tonnages

<table>
<thead>
<tr>
<th>Port</th>
<th>Exports</th>
<th>Transhipped from elsewhere for export</th>
<th>Transhipped elsewhere for export</th>
<th>Adjusted exports</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ports of Auckland</td>
<td>1,629,695</td>
<td>317,400</td>
<td>4,582</td>
<td>1,316,877</td>
<td>-19%</td>
</tr>
<tr>
<td>Port of Tauranga</td>
<td>4,679,139</td>
<td>633,293</td>
<td>41,372</td>
<td>4,087,218</td>
<td>-13%</td>
</tr>
<tr>
<td>Port of Napier</td>
<td>1,339,963</td>
<td>44,999</td>
<td>232,061</td>
<td>1,527,025</td>
<td>14%</td>
</tr>
<tr>
<td>CentrePort</td>
<td>361,474</td>
<td>608</td>
<td>73,676</td>
<td>434,542</td>
<td>20%</td>
</tr>
<tr>
<td>Port Nelson</td>
<td>316,113</td>
<td>37</td>
<td>246,806</td>
<td>562,882</td>
<td>78%</td>
</tr>
<tr>
<td>Lyttelton</td>
<td>1,295,568</td>
<td>28,061</td>
<td>161,111</td>
<td>1,428,618</td>
<td>10%</td>
</tr>
<tr>
<td>Primeport Timaru</td>
<td>390,583</td>
<td>2,591</td>
<td>78,436</td>
<td>466,427</td>
<td>19%</td>
</tr>
<tr>
<td>Port Otago</td>
<td>855,097</td>
<td>23,158</td>
<td>151,372</td>
<td>983,311</td>
<td>15%</td>
</tr>
<tr>
<td>Southport</td>
<td>242,464</td>
<td>-</td>
<td>31,146</td>
<td>273,610</td>
<td>13%</td>
</tr>
<tr>
<td>Overall</td>
<td>11,110,095</td>
<td>1,050,146</td>
<td>1,020,561</td>
<td>11,080,510</td>
<td></td>
</tr>
</tbody>
</table>

\(^3\) Ministry of Transport Freight Information Gathering System
2.5.2 Import transhipments

If imported containers immediately transhipped to another NZ port are regarded as being imported into the second port, then the import figures would change to those below. For instance import tonnages into Auckland (the largest source of import transhipments) would decrease by 5%, and tonnage imported into Lyttelton (the largest destination of import transhipments) would increase by 14%.

<table>
<thead>
<tr>
<th>Port</th>
<th>Imports</th>
<th>Transhipped elsewhere after import</th>
<th>Transhipped from elsewhere after import</th>
<th>Adjusted imports</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ports of Auckland</td>
<td>3,296,058</td>
<td>182,336</td>
<td>4,722</td>
<td>3,118,444</td>
<td>-5%</td>
</tr>
<tr>
<td>Port of Tauranga</td>
<td>1,461,541</td>
<td>22,012</td>
<td>11,467</td>
<td>1,450,995</td>
<td>-1%</td>
</tr>
<tr>
<td>Port of Napier</td>
<td>177,838</td>
<td>6,161</td>
<td>17,180</td>
<td>188,857</td>
<td>6%</td>
</tr>
<tr>
<td>Centreport</td>
<td>342,098</td>
<td>440</td>
<td>50,091</td>
<td>391,749</td>
<td>15%</td>
</tr>
<tr>
<td>Port Nelson</td>
<td>48,651</td>
<td>740</td>
<td>18,049</td>
<td>65,961</td>
<td>36%</td>
</tr>
<tr>
<td>Lyttelton</td>
<td>772,413</td>
<td>10,848</td>
<td>115,735</td>
<td>877,300</td>
<td>14%</td>
</tr>
<tr>
<td>Primeport Timaru</td>
<td>84,627</td>
<td>7,945</td>
<td>259</td>
<td>76,940</td>
<td>-9%</td>
</tr>
<tr>
<td>Port Otago</td>
<td>124,729</td>
<td>130</td>
<td>11,966</td>
<td>136,565</td>
<td>9%</td>
</tr>
<tr>
<td>Southport</td>
<td>94,628</td>
<td>499</td>
<td>-</td>
<td>94,129</td>
<td>-1%</td>
</tr>
<tr>
<td>Overall</td>
<td>6,402,584</td>
<td>231,111</td>
<td>229,467</td>
<td>6,400,940</td>
<td></td>
</tr>
</tbody>
</table>
Section 3: Air trade trends

3.1 Key trends
- Some growth in air freight value and volume in 2015
- Little change in export destinations
- China is growing as a source of air freighted imports
- Auckland airport dominates airfreight

3.2 Value and volume
The data source for airfreight volume is customs data. There has been growth in internet sourced imports, but goods valued at under NZ $1,000 are not included in the customs figures.
3.3 Commodity trends

There has been little change in the air export commodity mix.

Much of the export value is in machinery, electrical equipment and vehicles and vehicle parts (shown as “Machinery, vehicles”).

Air import value is dominated by machinery, electrical equipment, vehicles and vehicle parts.
3.4 Air origins and destinations

The air export destination mix has changed very little, probably reflecting the availability of capacity. Most airfreight is moved in passenger jets, which limits freight capacity.

China has increased as an import origin, while Australia and the Pacific is declining.
3.5 Airport activity

Auckland airport is New Zealand’s predominant air freight hub, reflecting the number and mix of services available.
Section 4: Container shipping trends

4.1 Key trends
- the size of the container ships visiting New Zealand has increased
- the size of the container ships being built is increasing
- the largest capacity growth is anticipated to be in ships larger than 10,000 TEU (twenty foot equivalent containers)

4.2 Oceania ship capacity and size mix
The median (middle) size of cellular ships visiting New Zealand has been increasing, from a median size of 1900 TEU at the start of 2009 to 2750 now. The Ministry of Transport FIGS report provides more information on visiting ships, and TEU/container transfers.

Fig 4.2a Quarterly container ship capacity (TEU)

Source: Ministry of Transport FIGS report, Jan 2015-Dec 2015

4% of world container ship capacity is servicing the Oceania trade. 30% of that capacity is servicing New Zealand (based on Australian and NZ container loads and discharges) so our share of world container ship capacity is about 1%.

Fig 4.2b Cellular ship TEU, Jan 2016

Source: Alphaliner Jan 2016
The mix of ship sizes servicing Oceania was similar to the mix servicing Latin America and Middle East-Indian sub-continent, but it has evolved to have a substantial number of ships in the 4,000-5,099 TEU range. Most of those ships are servicing Australia rather than New Zealand, or both New Zealand and Australia.

4.3 Trends in the global container fleet

Internationally cellular fleet capacity growth is expected to be concentrated in the 7,500+ and 10,000+ TEU size ranges, with limited production of the ship sizes likely to visit New Zealand.

The projected fleet continues to have sizable numbers of ships in the size range that service New Zealand currently (up to 5,100 TEU), and the sizes that will eventually join the New Zealand trade (5,000-8,000 TEU).
Section 5: Container trade routes

The table on the next page shows the container trade routes to and from New Zealand.

There are many services available to the New Zealand market, though the number of choices and destinations differs from port to port. Tauranga and Auckland in particular have a wide range of options available.

A notable trend has been an increase in the ship sizes. There are several weekly services available using ships averaging over 4,000 TEU in size, which has only come about recently.

Traffic from New Zealand to Europe does not necessarily travel on the direct European services. Transhipping via Singapore or Malaysia (using a South East Asia service) is a common option.

Summary of the container routes

<table>
<thead>
<tr>
<th>Direct links to : From :</th>
<th>North Asia</th>
<th>South-east Asia</th>
<th>North America/Europe</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auckland</td>
<td>4</td>
<td>6</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Tauranga</td>
<td>4</td>
<td>7</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Napier</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Wellington</td>
<td></td>
<td>5</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Nelson</td>
<td>2</td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Lyttelton</td>
<td>2</td>
<td>4</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Timaru</td>
<td>2</td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Otago</td>
<td>1</td>
<td>2</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Bluff</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

This table is not weighted by service frequency.
<table>
<thead>
<tr>
<th>Container trade routes June 2016</th>
<th>To/from zones outside Oceania</th>
<th>New Zealand ports</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Australia</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To/from Oceania</td>
<td></td>
<td></td>
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<tr>
<td>To/from Oceania</td>
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<td><strong>New Zealand ports</strong></td>
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<tr>
<td>Oceania - North Asia</td>
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<td>CMA CGM/OOCL/PIL/CSC/COSCO/USL - ANZEX</td>
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<tr>
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Source: Compair

(*) the entire nominal ship TEU capacity shown may not be available due to containers pre-loaded in Australia and/or the heavy average weights of New Zealand export containers.