

BUSINESS OPPORTUNITIES BETWEEN MĀORI & THAILAND'S BIO-CIRCULAR- GREEN ECONOMY

A JOINT STUDY TO LOOK
AT THE POTENTIAL

Southeast Asia
Centre of
Asia-Pacific Excellence





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Southeast Asia
Centre of
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Foreword



**AMBASSADOR
OF THE KINGDOM
OF THAILAND
TO NEW ZEALAND**
H.E MR. WARAVUTH POUAPINYA

In the world of rapid economic growth, the environment has unavoidably been gravely impacted. Climate change, as a result, has led to the increase in severe weather disasters and worsening pollution that adversely affects all creatures' wellbeing. Consequently, governments and businesses are now shifting their approaches to focus on ways in which economic development can go hand-in-hand with environmental preservation. With this in mind, the inaugural joint study to explore the Business Opportunities Between Māori and Thailand's Bio-Circular-Green (BCG) Economy could not be timelier.

As noted by the researchers, there is a huge potential to expand economic relations between Thai businesses and Māori, and indeed the wider New Zealand economy as a whole, both trade-wise and in terms of investment. The Māori Economy has undeniably been growing from strength to strength in the past decades, and is today valued at approximately 70 billion NZD, a figure that is projected to reach 100 billion NZD by 2030. Importantly, Māori businesses envision sustainability with nature across generations rather than the extraction of resources for short-term gain. Combined with a dynamic and youthful population comprised of an increasingly prominent number of skilled entrepreneurs who embrace innovation and change, future prospects look bright for the Māori Economy.

Thailand, for its part, has adopted the BCG Economy Model, based on the people-centered Sufficiency Economy Philosophy (SEP) initiated by His Majesty the late King Bhumibol Adulyadej The Great, and the country's endeavour towards an inclusive and low-carbon society, as a strategy for post-pandemic recovery. It is a holistic model whereby science, innovation, and technology are applied to promote balanced and sustainable economic growth, prioritizing social and environmental considerations to support a resilient economy in which resourcefulness is optimized. In this regard, Māori and the BCG Models share the common value of

“kaitiakitanga” (guardianship and conservation), wherein economic value derived from nature guards against intrusions causing imbalances and protects environmental damage to the planet. Moreover, certain societal traits can also be commonly identified between Māori and Thai cultural attributes, like concepts such as “Manaakitanga” (respect, generosity, and care for people and communities), which is equivalent to the Thai notion of “Mettha” (loving kindness), or the importance of establishing “hononga”, or connections, for doing business with others, which is “kwam sampan” in Thai. In this sense, Māori and Thai business entities can be viewed as “natural partners”.

As such, it is my hope that this study provides a foundation by which both Māori and Thai businesses can explore ways and means to further enhance their cooperation and realize their full potential, especially as both entities are seemingly an ideal fit for businesses seeking to diversify their trade relations and investment prospects.

Finally, I wish to take this opportunity to express gratitude to Nuku Toi and SEA CAPE for their research collaboration, as well as members of “Team Thailand” for New Zealand, namely Thai Trade Centre, Sydney, Thailand Board of Investment (BOI), Sydney Office, and Office of Agricultural Affairs, Canberra, for their advisory roles and support throughout the project.

H.E. Mr. Waravuth Pouapinya

Foreword



**DIRECTOR OF
SOUTHEAST ASIA
CENTRE FOR ASIA
PACIFIC EXCELLENCE**
PROFESSOR SIAH HWEE ANG

The ASEAN region is New Zealand's third-largest trading partner. ASEAN is also a major economy that is close to New Zealand geographically. Thailand is at the centre of ASEAN and holds a pivotal role in the ASEAN economy and security.

In recent years, trade with Thailand has experienced a significant rise. Thailand's economy is also booming with an added focus on the Bio-Circular-Green Economy Model.

Back in New Zealand, the rising star is the Māori economy. It has always existed, but in recent years, the growth of the Māori economy cannot be underestimated. Many of the Māori businesses have also branched out internationally, including to ASEAN and, more specifically, to Thailand. A major part of this growth comes from the thinking around value-add through innovation building on the environment bestowed here in New Zealand.

Exploring the opportunities that connect the Māori businesses to the Bio-Circular-Green Economy Model of Thailand becomes a logical extension of closer ties between the two nations.

It is with this collaborative goal in mind that led the Southeast Asia Centre of Asia-Pacific Excellence to go into partnership with the Royal Thai Embassy in Wellington and NUKU TOI to conduct this study on some possibilities.

Conversations such as this are critical to maintain mutual understanding in place and further strengthen the two economies.

Professor Siah Hwee Ang

Foreword



DIRECTOR OF NUKU TOI

PAUL TE POA KARORO MORGAN,
CNZM QSO.

I have had the honour to reflect on and consider the economic development of Māori in Aotearoa New Zealand over the last two generations and how we may collaborate with Thailand and their aspirational Bio-Circular Green (BCG) policy. Māori have taken significant control of our physical resources, whenua (land) and rights in the moana (oceans), we have invested in the education of our people to build capability, skills, and capacity from which we have built and expanded our whānau, hapu and iwi businesses across Aotearoa. On the journey Māori have looked backwards and reflected on our ancestors voyaging across the Pacific from Asia and as a trading and exporting people, invested in several long-standing relationships and business partnerships with companies from Asia in the forestry, fishing, food and beverage and tourism sectors to broaden our spectrum of investments in Aotearoa in recent years.

To realise our further potential, it is timely to consider the opportunities to work on building relationships that lead to partnerships with Thailand stakeholders. Together, exploring environmental initiatives, sustainable approaches to business, education and capability building and underpinned with cultural exchanges. It opens new opportunities for Aotearoa and Thailand, to build relationships between our many innovative peoples and resourceful companies.

My business career has taken me across many countries in Asia and this has allowed me to witness the dynamic status, drive and growing economies which have helped lift millions of people out of poverty. Future opportunities exist for Māori and Thai who may wish to build mutual and strong personal relationships between our communities and countries.

The following Māori whakauaki (proverb) summarises and can support the working together between Thai and Māori peoples.

**He hono Tangata e kore e motu;
ka pa he taura waka e motu**

Unlike a canoe rope, a human bond cannot be severed.

Let us all through the aspirations of our research project pursue relationships together to grow prosperity and warm bonds between the peoples of our countries. We thank the Royal Thai Embassy, New Zealand, and SEA CAPE for engaging and supporting this research.

Paul Te Poa Karoro Morgan, CNZM QSO.



Executive Summary





This report was undertaken to explore the potential for collaboration between businesses in Thailand and Māori-led enterprises. The focus of the research was the food and agriculture sectors in New Zealand which play a significant role in trade with Thailand. Today 50 percent of New Zealand's fishing quota, 30 percent of the country's sheep and beef production, and 10 percent of the country's total dairy production are owned by Māori.

To provide a good understanding to Thailand stakeholders the research focuses on the growth and development of the Māori business economy drawing on economic data and reports from 2018 to 2021 from a variety of sources. The history of Māori as traders and entrepreneurs provides some context from the pre-colonisation period and a summary of the Treaty of Waitangi and claims settlements process gives an update on the growth of Māori enterprises and assets in the last two decades. Since 2002, the Māori economy has grown from \$16 billion to \$70 billion, with the asset base growing at 10 percent a year, much faster than the overall New Zealand economy. The report highlights the changing nature of the skills of a youthful Māori workforce with Census data showing 50 percent growth between 2013 and 2018 together with a greater concentration in higher skills jobs and business ownership.

Thailand's focus on the Bio-Circular-Green (BCG) Economy Model, underpinned by the Sufficiency of Economy Philosophy (SEP) lends itself well to potential collaborations with Māori enterprises. These are illustrated by the five Māori case studies presented in the report. While these are focused on the fishing, dairy, horticulture, seafood/aquaculture and nutraceutical sectors they do provide examples of the Māori approach to being Bio-Circular and Green as they manage their organisations based on principles of whakapapa (genealogy) and kaitiakitanga (guardianship).

Trade between Thailand and New Zealand has seen significant growth since the first Closer Economic Partnership was agreed in 2005 with further growth experienced since 2011 when a refresh of the agreement was made. Since 2005 exports from New Zealand have doubled and 2021-2022 saw Thailand become our eighth largest trading partner.

The characteristics of the Māori economy highlighted by this project, taken in conjunction with the report 'Thailand BCG Transformation: 40 case studies on the BCG and SEP in Action,' reveal fundamental similarities in social, cultural and philosophical approaches to managing business growth and suggest some areas of potential collaboration that could be explored. These could be developed through trade missions, case studies with Thai and Māori business leaders and best practice exchange at seminars or formal meetings. Future research would include sectors in both New Zealand and Thailand: agriculture/AgriTech; wellness and medicine; energy and ecotourism. The goal of growing sustainable BCG trade between our respective countries warrants exploration of the approaches outlined in the recommendations.

SECTION **1**

Te Ōhanga Māori: The Māori Economy



Introduction

The primary objective of this joint study with the Royal Thai Embassy, New Zealand is to overview Māori participation in the New Zealand economy and examine business opportunities and the untapped potential offered by the Māori and Thai economies.

The frame of reference and goals for the research are outlined as follows:

- 1. Overview of the Māori Economy:** Insights on the structure of the Māori economy, how it works, what drives it and distinguishes it with examples of businesses that operate within it. The focus for this first report is primarily on Food and Agriculture.
- 2. Doing Business with Māori:** Practical information on how Thai companies could tap into the Māori Economy, providing recommendations on how to approach Māori businesses and explore avenues for cooperation between the parties.
- 3. Learning from Each Other:** Highlight the areas of cooperation in which both Māori and Thai businesses can collaborate for mutual benefit, such as exchanges on best practice, expertise and traditional know-how, and identifying some opportunities for joint business ventures or research programs.
- 4. Future Research:** Identify potential for further research projects that could become part of a “series” focussed on individual Māori business sectors and corresponding sectors of the Thai BCG Economy (Model).

Methodology

The research for the New Zealand report draws on several sources including a series of interviews and analysis of the Māori Economy. To ensure we have triangulated data and given a holistic overview of the Māori economy we have drawn on the views of three different stakeholder groups as noted below. We also provide five case study summaries as examples of Māori-led businesses.

- The Māori economy from the perspective of Māori business analysts
- The Māori economy from the perspective of Māori researchers
- The Māori economy from the perspective of NZ government agencies and an independent economic consultancy

The report was reviewed by Professor Bryce Hool Emeritus Professor of Economics at Singapore Management University. Input and advice was provided by Professor Siah Hwee Ang, Director of SEA CAPE who co-commissioned this research. Mr Paul Morgan CNZM, QSO, formerly CEO of FOMA, former Chair of Wakatu, Trustee on the New Zealand - China Council and the NZ Asia Foundation and a leading Māori business leader, with 30 years' experience of international trade also reviewed the report.



Data Sources

Māori Business Analysts

In 2019, Māori business analyst, Joshua Hitchcock (Te Ati Awa, Taranaki iwi) undertook a six-part series of videos released in 2022 by Newsroom an independent New Zealand-based news and current affairs site. The links to five of the videos are included in the reference list and they provide a good overview of Māori led business. The videos include interviews with Māori business stakeholders and cover a range of topics from “What’s Driving the Māori Economy”, to how “Māori Values give businesses a Competitive Edge”. It includes an episode on “The Early History of the Māori Economy” which provides useful context. The series production was interrupted by COVID 19 and post 2020 the production team re-interviewed Māori business stakeholders to learn how their businesses had responded to COVID 19 conditions. They found that many had been able to adapt to the changed macroeconomy and were continuing to thrive.

Māori Researchers

The Māori Centre of Research Excellence Ngā Pai o Te Māramatanga with research from academics Dr Jason Mika (Tūhoe, Ngāti Awa, Whakatōhea, Ngāti Kahungunu) and Dr Chellie Spiller (Ngāti Kahungunu). Links to their work are included in the references.

Government and Economic Institutes

Other sources drawn on for this report include the following: (i) a report commissioned by the Reserve Bank of New Zealand in 2018, “Te Ohanga Māori, The Māori Economy”. This was prepared by BERL (Business and Economic Research Limited) a leading provider of economic research, analysis, and consultancy for business enterprises, organisations, iwi, institutions, and public sector clients in New Zealand. The report provides useful background including a definition of the Māori Economy and data that shows how this sector of New Zealand’s economy was faring in 2018; (ii) Statistics New Zealand, which collects data including exports and imports for the New Zealand Government,

provides statistics current to the year ending 2020. (iii) NZTE is another source of information from the New Zealand Government providing additional information on Māori exporters, organizations; (iv) New Zealand Story which is a Government initiative providing stories and highlights that advance New Zealand's profile internationally; (v) Te Puni Kokiri is the Government's principal policy advisor on Māori wellbeing and development; (vi) KMPG published a series of reports between 2016 and 2022, Māui Rau, looks for the possibilities for Māori business, future directions and potential as well as the barriers to implementation; (vii) The Productivity Commission in 2021 released two reports as an inquiry into Aotearoa's New Zealand. Within the main Frontier Firms report, there is a more detailed account with key insights from Maori perspectives in He Manukura. All sources are either footnoted or included in the reference list.

Māori Case Studies

To complement the accounts and reports on the measures of the Māori economy taken from the sources noted above, we conducted case study research to provide illustrative examples of Māori businesses. This research draws on previous interviews, publicly available articles, and material from their company websites. Summary case studies of five business types are presented as part of Section 2.



Structure of the Report

The Executive Summary provides an overview of the research and key conclusions.

Section 1 starts with a definition of the Māori economy from the Reserve Bank report 'Te Ohanga Māori' and a section on Māori networks highlights how Māori collaborate. This is followed by a snapshot of the status of the economy as of 2018. The highlights provide data on the growing asset base, and the changing Māori workforce with a breakdown of the Māori industry sector showing export growth to 2020.

Section 2 provides some the history of Māori contribution to the New Zealand economy to provide some context. The entrepreneurial mindset of Māori, their values-based approach and focus on sustainability in business are covered with short case study examples of Māori-led organisations operating in Food/Agricultural sectors. Data from company websites and conversations with stakeholders highlight the importance of social capital and relationship development to Māori business success. This section concludes with a summary of the growing international opportunities with Māori-led enterprises.

Section 3 covers an overview of the Thai economy and its adoption of the Bio-Circular-Green economy model. It summarises most recently available data on trade between New Zealand and Thailand. It highlights two Royally funded and initiated projects that were first introduced to improve well-being and pursue sustainability and then draws on BCG Thailand Transformation report providing four examples of Thai companies using the BCG approach. There are links to the full report in the reference section.

Section 4 outlines ideas for next steps and ways to build relationships with Māori to support Thai - Māori engagement for trade development.

Section 5 recommends and identifies the potential for future engagement and further research.

The [Appendices](#) provide a full reference list with links, glossary of terms and background on the researchers.

Te Ōhanga Māori: The Māori Economy



Te Ōhanga Māori, or the Māori economy, is a well-established, dynamic, and growing sector of the economy of Aotearoa New Zealand. It is no longer a separate distinct and clearly identifiable segment of the Aotearoa New Zealand economy as Māori participation and contributions to the economy can be seen in several areas (BERL, 2021) weaving and contributing to the overall New Zealand economy. The Māori economy is represented by several different businesses, not for profit, non-government organisations (NGOs) and community enterprises.

These include:

- Skilled workers in production and trading
- Skilled workers in iwi,¹ hapū² trusts or in an incorporation that provides

[1] An iwi, or Māori tribe, is one of the largest kinship groupings and is made up of several hapū that are all descended from a common ancestor.

[2] Hapū are clusters of whānau where the whānau is usually an extended family grouping consisting of children, parents, often grandparents, and other closely related kin.

owner dividends, education, or contributions to retirement savings among other benefits

- Incorporation trusts or runanga³ enterprises operating under the Māori Act 1993, the Incorporated Societies Act 1908 and the Trusts Act 2019.
- Managers or trustees of an iwi or trust overseeing multi-million-dollar enterprises, as well as unpaid members caring for their whānau,⁴ hapu, iwi or community
- Businesses employing others to deliver goods/service for sales in NZ and offshore
- Business and contracted entities delivering health and education services by Māori for Māori

These numerous forms of participation and contribution to the economic system reflect a different approach to the economy which can be partly described by the Living Standards Framework (LSF). The LSF is a framework for intergenerational wellbeing spanning a broad range of economic, social and environmental outcome domains at a high level (Treasury, 2018). This was developed in 2018 and has since been modified (refer appendix 1) to reflect changes that 'better reflect children's wellbeing and culture, including being more compatible with wellbeing as understood in Te Ao Māori and by Pacific Peoples' (Treasury, 2021).

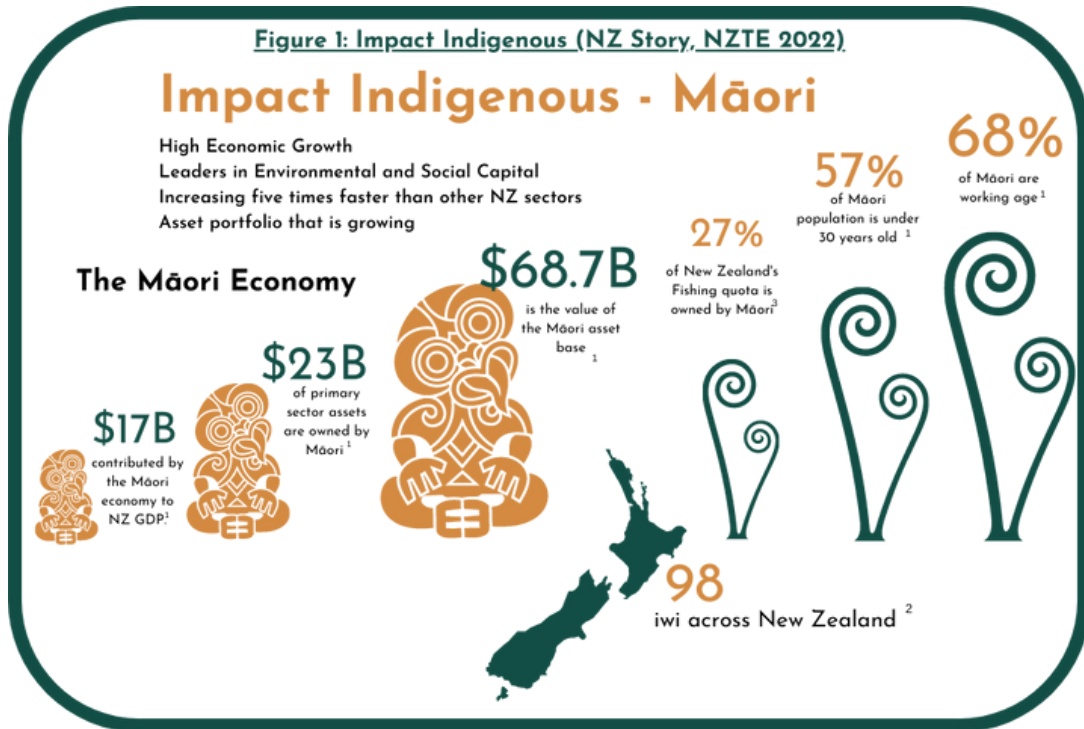
More recently frameworks such as Te Taihū Intergeneration Plan⁴ show how Māori take a leadership role in working with the regional communities from Marlborough, Nelson, and Tasman to develop long term strategies and measures.

[3] Runanga is a council, tribal council, assembly, board, boardroom, iwi authority - assemblies called to discuss issues of concern to iwi or the community.

[4] Whānauare family or extended family members.

[5] Te Taihū: Intergenerational Strategy.

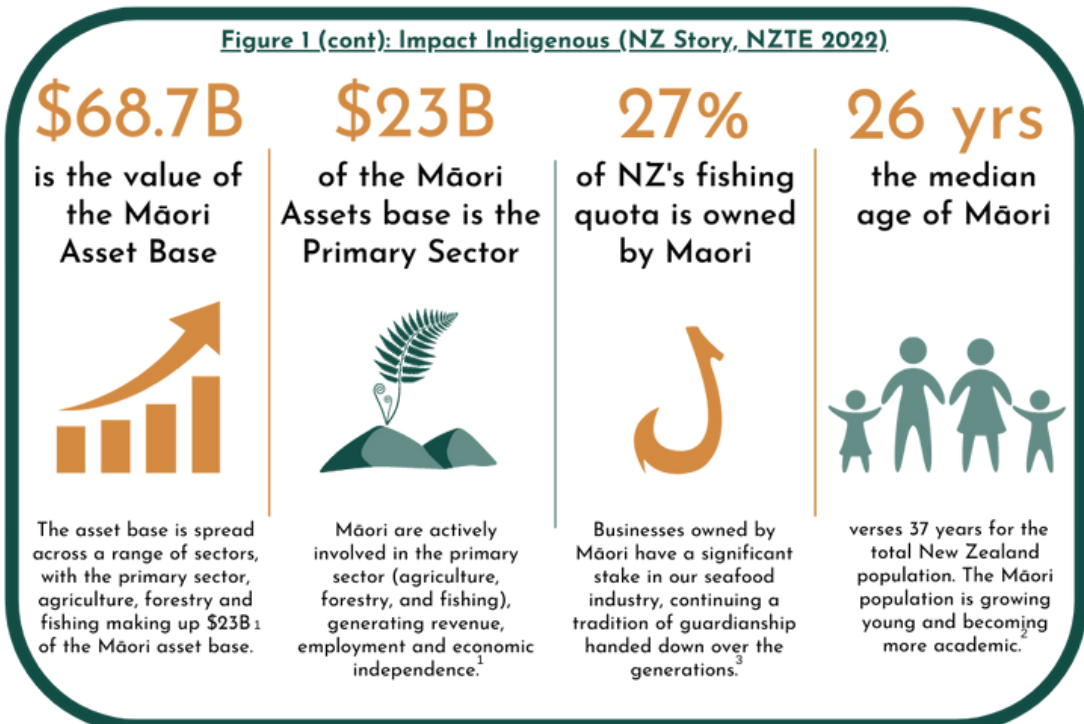
Figure 1: Impact Indigenous (NZ Story, NZTE 2022)



Māori Networks

Māori have several networks which they draw on to support their business success. For ease of understanding, Māori networks can be divided into four segments with each having their own context and purpose. It is important to understand, like all communities Māori are not homogeneous. The term Māori has taken prominence in

Figure 1 (cont): Impact Indigenous (NZ Story, NZTE 2022)



Sources:
1. Reserve Bank of New Zealand, Te Ōhanga Māori 2018
2. Statistics New Zealand 2013 Census
3. Seafood New Zealand, 2022

and abroad to refer to the indigenous people of Aotearoa. This term has come about since colonisation and in the early days the word Māori simply meant 'normal, natural, or ordinary man and women'.⁶ Māori communities prior to colonisation were known through their iwi and hapu relationships and today these continue to play a significant role in Māori success. Māori networks are described below.

A Māori business is a business that is owned by a person or people who have Māori whakapapa⁷, and a representative of that business identifies the business as Māori. Māori authorities are economically significant businesses involved in the collective management of assets held by Māori.

The following provides a summary and links to each segment. Note this is not intended to be an exhaustive list.

1. Tribal

Tribal affiliations are used to refer to organisations that are recognized as having historical Māori⁸ bloodlines, known as iwi⁹ (tribe); hapu (subtribe) and whānau (family group). Each tribe descends from an ancestor(s) who traveled on the original migration waka from East Polynesia. From DNA analysis it is suggested that Māori also originated from Taiwan¹⁰. There are numerous complexities and inter-relationships between iwi, hapu, and whānau.

These include the broader hapu where whānau are part of neighboring tribal communities. Today, many individual Māori have multiple whānau, hapu, and iwi connections. Tribes, hapu, and whānau may have a series of organisations that represent their specific interests.

[6] The Word Māori (1966 Encyclopedia of New Zealand - Te Ara)

[7] Whakapapa is the core of traditional Mātauranga Māori (Māori Knowledge) - it means genealogy (Te Ara Encyclopaedia of New Zealand).

[8] [TKM | Home | Te Kāhui Māngai | Te Kahui Mangai: Directory of Iwi and Māori Organisations | Te Kahui Mangai](#)

[9] [Tribal organisation \(teara.govt.nz\)](#)

[10] [Theories of Māori origins - Ideas about Māori origins - Te Ara Encyclopedia of New Zealand](#)

Figure 2: Iwi Tribes of New Zealand (NZTE)



Te Puni Kōkiri, the Ministry of Māori Development of New Zealand have developed an interactive map showing Iwi by Region. The latest estimate of the Māori ethnic population is 892,200 (17.4% of the national population). This has grown 2% since 2021 (versus 0.2% for the national population [Stats NZ, 2022](#)). There are over 100 iwi ranging in size; the largest being Ngāpuhi (165,201 members), the second largest, Ngāti Porou (92,349) and Ngāti Kahungunu, third largest with 62,967 members. For more full information on the number of iwi in New Zealand refer to [List of Iwi](#).

Post Settlement Governance Entities (PSGE)

These entities are new constructs that have been a requirement from the government to iwi for the receipt of commercial, social, cultural resources from the NZ government's Treaty of Waitangi negotiation process¹¹. Other forms of

[11] [Māori Treaty of Waitangi post settlement governance entities \(PSGE's\) five things you need to know!](#) R Collins Lawyers

settlement entities have arisen from various arrangements, such as the Māori Fisheries Settlement Act 2004¹².

Some entities that hold resources on behalf of Māori may include whānau and hapu from more than one iwi. The National Iwi Leaders Forum is a body that brings all tribal leaders together to advance policy and programs that benefit Māori.¹³

A compelling statistic is that the New Zealand government has invested around \$1.5 billion in Treaty Settlements with tribes over the past couple of decades. It was reported in 2021 that Treaty settlements assets had an estimated value of \$10.8 billion.¹⁴ The largest eight tribal settlements in 2023 accounted for some \$8.1 billion.¹⁵

Trusts and Incorporations

There are multiple levels of trusts and incorporations¹⁶. These can range from a specific parcel of land to a whānau trust that holds funds for social, cultural, and commercial means which can include the relief of poverty or education. Many incorporations are trading internationally and are national bodies. There are thousands of such organisations and at times they may have competing interests.

2. Pan Tribal

These may range from regional pan tribal arrangements to conglomerates and national bodies. Examples include those entities which have received a settlement as part of the Māori Fisheries Act 2004, the Te Ohu Kaimoana. Others include the National Kohanga Reo Trust¹⁷ (Māori Early Childhood language); the Central North Island Iwi Collective¹⁸ (Forestry Settlement) and the Iwi Collective Partnership¹⁹ as well as collectives of PSGE commercial arms²⁰. Urban Māori Authorities enterprises are large organisations that cover a wide spectrum of

[12] [Māori Fisheries Act 2004 No 78 \(as of 28 October 2021\)](#), Public Act Contents – New Zealand Legislation

[13] [Tikanga | Iwi Chairs Forum Secretariat Sharing the Vision of Kotahitanga](#)

[14] <https://www.tdb.co.nz/wp-content/uploads/2022/03/TDB-Advisory-Iwi-Investment-Report-2021.pdf>

[15] <https://www.nzherald.co.nz/business/ten-post-settlement-iwi-have-81b-assets-new-report/TA6KCJMRQVGY7CQ6S4RZVPQNMQ/>

[16] [Māori Land Trusts & Incorporations | Māori Land Court \(maorilandcourt.govt.nz\)](#)

[17] [Home - Te Kōhanga Reo \(kohanga.ac.nz\)](#)

[18] [Central North Island Iwi Collective \(cniwiholdingsltd.co.nz\)](#)

[19] [Iwi Collective Partnership](#)

[20] [\\$115M Investment partnership announced](#)

economic, social, and cultural services. These entities are found across the nation and their primary goal is to advocate, promote and develop Māori achievement through strengthening and sustaining whānau success through a dedicated workforce and innovative solutions.²¹

Other key parties are the Federation of Māori Authorities²² (FOMA) which assists Māori Businesses to achieve greater returns, increasing exports and GDP. Māori Tourism offers a unique insight into culture and experiences.²³

Figure 3: Advert for FOMA Summit



There are organisations like Te Ohu Kaimoana²⁴ established to advance the interests of Māori in fishing and fisheries-related activities, to return valuable fisheries assets and funds from the Settlement to iwi organisations and companies like Moana NZ which is the largest Māori-owned fisheries company in New Zealand. Moana is also a 50% shareholder with a Japanese company in Sealord Limited.²⁵

There are educational bodies that include three Wananga, (tertiary education institutions) and these include Te Wananga o Raukawa, Te Whare Wananga o Awanuiarangi, and Te Wananga o Aotearoa.²⁶ With the growing interest from Māori in technology today we are seeing the growth of associations like Te Matarau supporting the growing number of Māori working in the NZ Tech sector.²⁷

[21] <https://www.numa.co.nz/about-us/>

[22] [Home - Federation of Māori Authorities \(foma.org.nz\)](http://Home - Federation of Māori Authorities (foma.org.nz))

[23] [NZ Māori Tourism](#)

[24] [Te Ohu Kaimoana](#)

[25] [Sealord | Careers, Frozen Fish, Canned Fish, recipes and more](#)

[26] [Te Wānanga o Raukawa \(wananga.com\)](#); [Home page | Te Whare Wānanga o Awanuiārangi \(wananga.ac.nz\)](#) [Te Wānanga o Aotearoa | Bridging & Tertiary Courses NZ | TWoA](#)

[27] [Te Matarau | Māori Tech Community and Māori tech ecosystem shaping our future - NZTech](#)

3. Small to Medium Enterprises (SMEs)

Small to Medium sized Enterprises in New Zealand are smaller in comparison to other nations, particularly with the SMEs in Asia. As previously noted, most Māori businesses are SMEs. One of the unique aspects of supporting SMEs has been the establishment and growth of regional Māori business networks, such as Whariki the largest Māori business network that brings together the whānau of Māori business owners and Māori professionals working amongst corporates in Aotearoa. Te Awe is a Wellington Māori Business Network dedicated to encouraging and promoting business enterprises in the Te Whanganui a Tara (Wellington) Rohe through effective networking hui and manaakitanga.

4. Māori - Government and Māori - Business Groups

The growth of Māori departments and/or teams within government has flourished over the past 20 years. This is in part to better serve Māori constituent communities and to meet the Government's obligations under the Treaty of Waitangi²⁸ This has seen a growth in skills, experience across local and central government including trade and foreign affairs. Most large legal and financial advisory firms have established Māori led consultancy teams. Examples include KPMG Māori - KPMG New Zealand and Buddle Findlay Māori law | Buddle Findlay

Te Hono is a partnership between the leaders of Aotearoa New Zealand's food and fibre sector companies, iwi, and government agencies.



Their vision is for Aotearoa New Zealand to be a global food and fibre exemplar - economically, environmentally, and socially; a vision of our primary sector that will contribute to ensuring our country is a place where our children and their children want to live, work, and thrive.

[28] The role of the Public Service - Te Kawa Mataaho Public Service Commission

Figure 4: Boot Camp on Future of Food and Fibre, Stanford University 2019 (Te Hono)



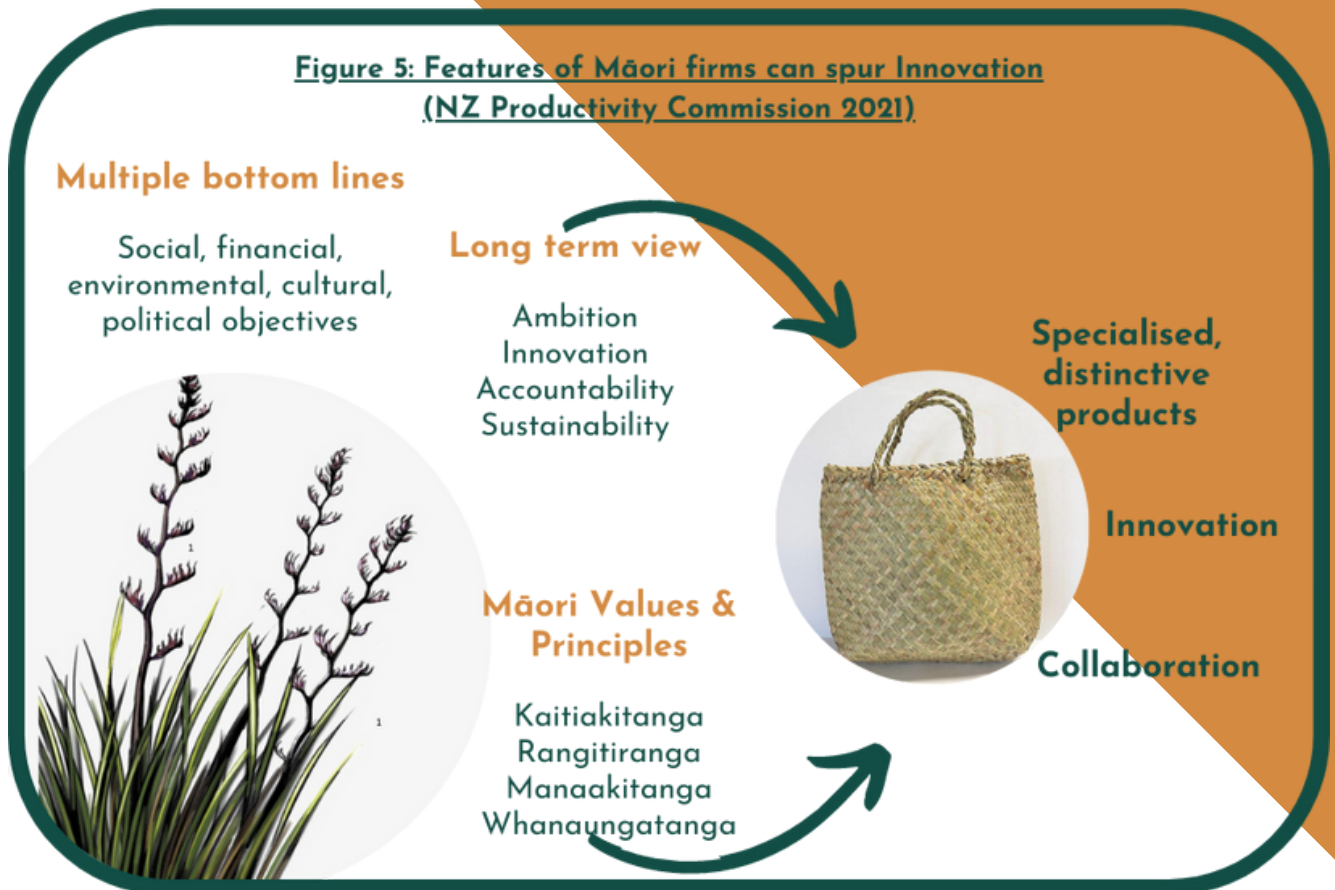
Te Taumata is the premier authentic voice for Māori on trade between New Zealand and the rest of the world. Their extensive and experienced network works directly with Māori businesses to deliver better trade outcomes for Māori and a more prosperous future for our whānau and communities.

Taiao Ora is an independent, collaborative initiative to put the wellbeing of Te Taiao (our natural world) at the heart of New Zealand's food and fibres sector.

The Aotearoa Circle collaborates with Māori to assist in the restoring of New Zealand ecology and environment.

Highlights of the Māori Economy

Figure 5: Features of Māori firms can spur Innovation
(NZ Productivity Commission 2021).



The following commentary provides an overview of the Māori economy. It is important to note that much of the available information was taken from data gathered pre-COVID notably, in 2018 and 2020. Despite COVID, Statistics NZ confirms Māori export growth has continued.²⁹

Te Ohanga: The Māori Economy report by BERL (2021) and a report by the Productivity Commission (2021) confirm that Māori authorities and SMEs are growing faster than the wider economy providing opportunities for businesses and government to learn from Māori frontier firms.

“The Māori economy exhibits many of the characteristics needed for firms to innovate, grow, and support improved wellbeing. Employment in Māori authorities and SMEs has been growing faster than in the wider economy. Māori authorities and SMEs are more likely to export and have higher rates of innovation and R&D, than New Zealand firms generally” (Anaru Mill & Declan Millin, 2021).

[29] [Exports continue to rise for Māori authorities through COVID-19 | Stats NZ](#)

In 2018, the contribution to GDP by Te Ōhanga Māori producers totalled NZ\$17 billion with the breakdown by sector shown in Table 1 below. While this represented 7% of total GDP production in New Zealand in 2018 (refer Appendix 1) the Māori economy was measured as producing GDP sectoral contributions as follows.

- 18% of Agriculture, Forestry and Fishing
- 15% of Education and Training
- 10% of Construction
- 10% of Administration and support
- 10% of Information, media, arts, recreation services

GDP Growth

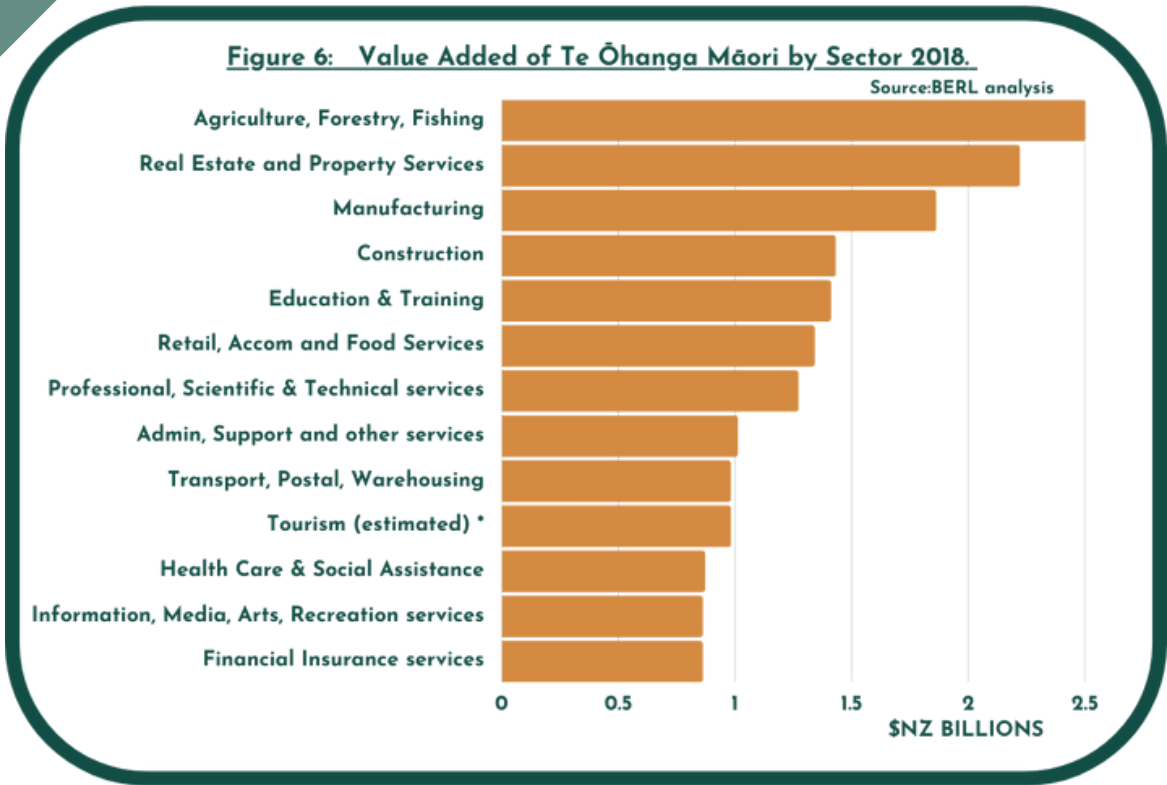
The Te Ohanga report by BERL reports that GDP from Te Ōhanga Māori increased from \$11 billion in 2013 to \$17 billion in 2018 (Table 1). This “increase in Te Ōhanga Māori GDP translates to 37 percent in real growth and compares with national growth in GDP of 20 percent in real terms over the same period” (BERL, 2018)

Te Ōhanga Māori GDP is therefore estimated to have grown considerably faster than the New Zealand overall economy over the 2013 to 2018 period with the growth driven by the manufacturing and construction sector, along with substantial growth across the other services sector.

Table 1: Value Added Percentage Change in the Māori Economy - 2013-2018

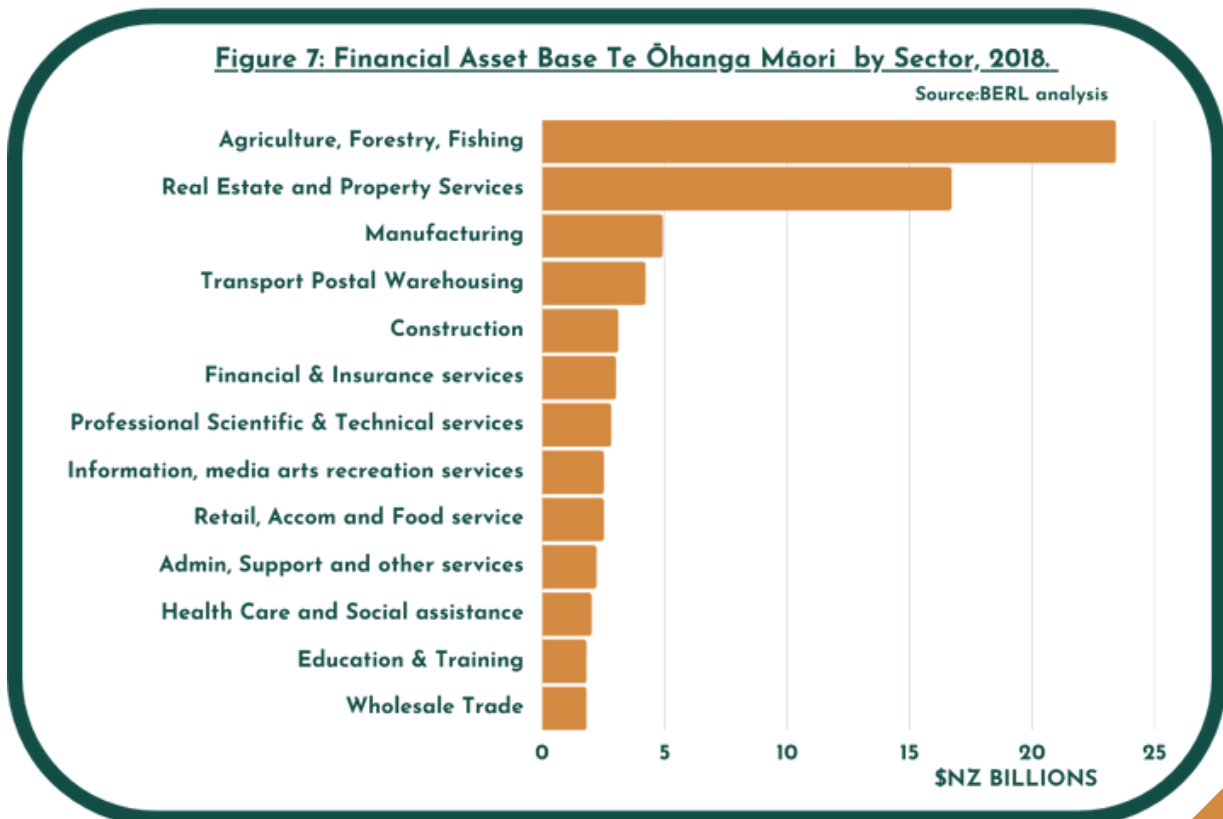
Sectors	2013 (\$million)	2018 \$million	% Change
Primary	1728	2400	34.7
Manufacturing & Construction	1971	3308	67.8
Other Sectors	7221	11339	57
Māori Economy Total	10975	17047	55.3
Other Enterprises	171154	230318	34.6
TOTAL*	182129	247365	35.8

*Excludes Govt Admin & Defence sector Source: BERL, 2018



Growing Asset Base

The Māori asset base is increasingly diverse - the previous concentration of Te Ōhanga Māori in the primary sector has dispersed, spreading risk, and increasing resilience. 'Te Ōhanga Māori now encompasses activity and enterprise additional to, and far beyond, Te Tiriti settlements, and increasingly it is an engine of growth in the economy of Aotearoa' (BERL, 2020).



Natural resources-based sectors dominate with assets in agriculture, fishing and forestry totaling \$23.4 billion. This includes \$8.6 billion in sheep and beef farming, \$4.9 billion in dairy, \$4.3 billion in forestry, \$2.9 billion in fishing and aquaculture and \$2.6 billion in other agriculture including horticulture. Other assets include \$16.7 billion in real estate services and \$4.9 billion in manufacturing including \$2.3 billion in food processing and wood and paper manufacturing.

The research shows total assets were valued at approximately \$70 billion, of which \$23 billion is made up by the primary sector asset base. Fifty percent of New Zealand's fishing quota, 30 percent of the country's sheep and beef production, and 10 percent of the country's total dairy production are owned by Māori. Since 2002, the Māori economy has grown from \$16 billion to \$70 billion, with the Māori asset base growing at 10 percent a year, much faster than the overall economy (Hitchcock, J 2022).

Figure 8: Māori Investment Opportunities by the numbers: Background for Investors: NZTE story.



Leaders in sustainability

The Global financial community is increasingly turning to sustainability - the balance of people, planet and profit - as guiding investment strategy. For Māori it has always been this way.

Māori are closely connected to the environment through whakapapa (genealogy). This relationship brings an obligation that natural resources are nurtured for the benefit of future generations this is captured in the Māori concept of kaitiakitanga which translates as guardianship. The inherent ability to think and act sustainably is a valuable attribute that Māori bring to any investment project.



Natural innovators & entrepreneurs

From earliest times, Māori have been explorers, risk-takers, entrepreneurs, philanthropists and visionaries. Seven hundred years before the first arrival of Europeans, the Māori people navigated the Pacific Ocean and created their own vibrant economy.

This entrepreneurial spirit continues today. Māori entities own and manage a wealth of natural resources across several key sectors; particularly food and beverage, forestry, tourism and construction. Global consumers are attracted to the unique provenance of Māori produced goods and services, as demonstrated by world-class operators such as Kono NZ. Beyond the traditional sectors, Māori are innovating across every area from health to hi-tech, education to eco-tourism. Medicinal cannabis company Rua Bioscience is one such example.

Figure 8: Māori Investment Opportunities by the numbers: Background for Investors: NZTE story
(continued).



Authentic relationships

For Māori, business partnerships are more than just a commercial arrangement - they are underpinned by the concept of whanaungatanga (creating connectedness and relationships).

Māori seek to build mutual trust and integrity when partnering with others. The value they place on whanaungatanga stems from traditional kinship; the kind of relationship built through shared experiences and working together for a common purpose. This can result in business partnerships that are more enduring, confident and stable.

A related concept is that of manaakitanga (which relates to the care and responsibility extended to others). This is strongly reflected in the business philosophies of Māori food and beverage producers, tourism operators and other export sectors.



A purposeful approach

For Māori, the over-arching goal of any investment is to create sustainable prosperity and intergenerational well-being. This is why Māori owned enterprises are usually woven into the fabric of their ancestral regions and local economies. One example is the Waiū Dairy in the regional town of Kawerau, where a collaboration of 11 Māori businesses have partnered with their Japanese shareholder Imanaka. As a majority employer and exporter Waiū will deliver significant benefits to the region and its people.

While operating as global citizens - and being open to and adapting to other cultures and ways of doing business - Māori will always hold true to the aspirations of their people and to their own destiny. For investors this provides a strong platform for corporate social responsibility and long-term value creation.

Figure 8: Māori Investment Opportunities by the Numbers: Background for Investors.



\$3.5b

Source: Statistics on Māori businesses: 2019, Statistics NZ

Total income for Māori authorities in 2018, a seven year high



\$755m

Source: Statistics on Māori businesses: 2019, Statistics NZ

Worth of goods was exported by Māori authorities in 2020



44%

Source: Analysis of Top 200 firms and top 10 Māori business, Deloitte Access Economics April 2020

Average profit margin for the top 10 Māori businesses 2014 to 2019



\$69b

Source: Te Ohānga Māori, The Māori Economy 2018, Reserve Bank of NZ

The value of the Māori asset base and Māori economy

Growth in Māori Labour Force

The Māori population is youthful, with a median age of 26 years and there has been significant growth in the Māori population and labour force, which is set to continue. Māori will be a rising proportion of the future workforce. Between the 2013 and 2018 Censuses, the number of working Māori in Aotearoa grew by 105,000, a 50 percent increase in five years. Despite a period of very high immigration, more than a quarter of the growth in the labour market is the addition of Māori workers (BERL, 2020).

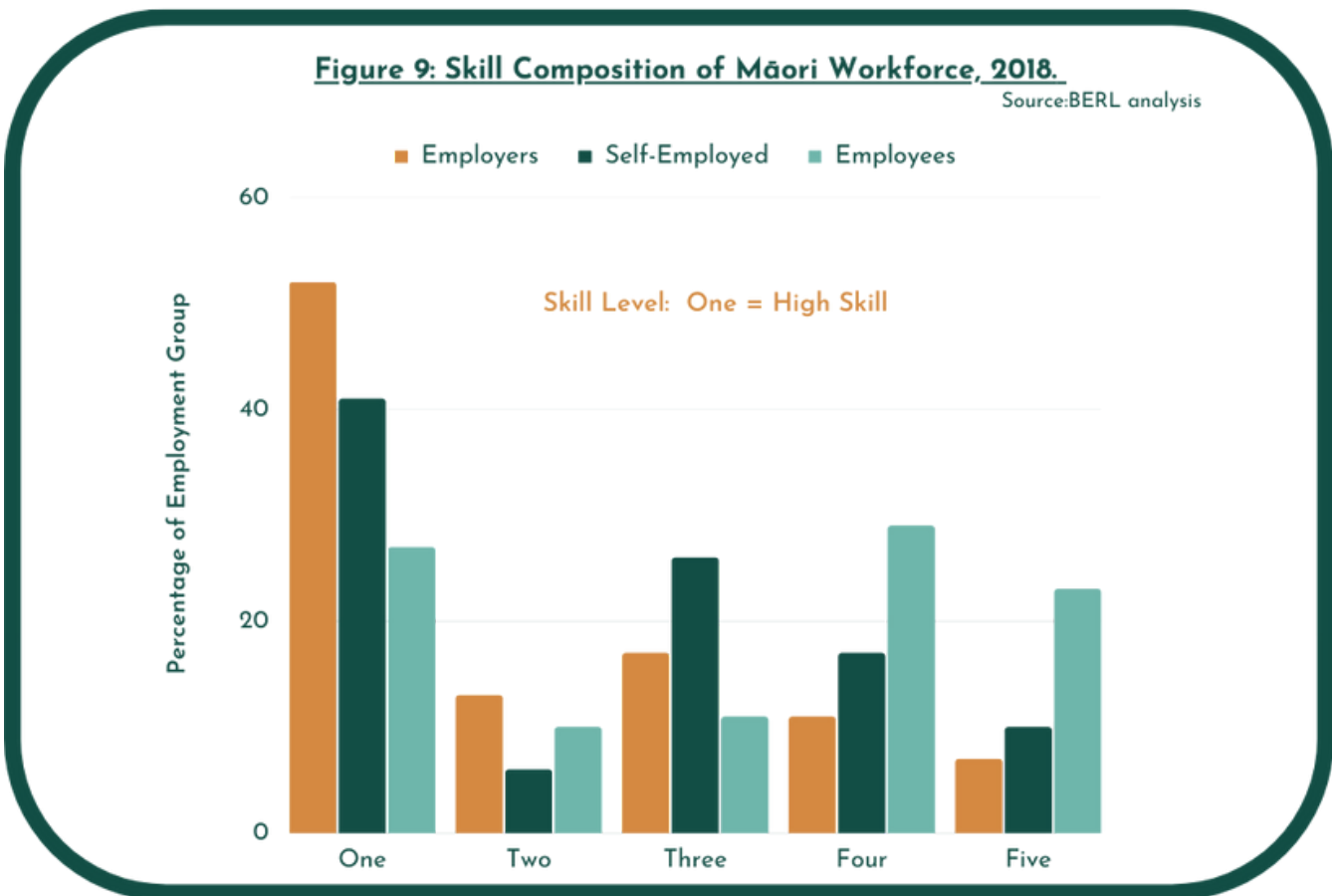
Rangatahi (the younger generation) will be the backbone of the future of Aotearoa, and New Zealand will benefit from supporting them (Reid, Schulze, Green, Groom and Dixon, 2020). The Matapaeroa report from Te Puni Kōkiri found almost 40 percent of Māori-owned businesses have wāhine (female) Māori as owners and identified 23,300 economically significant Māori-owned businesses. On a population proportional basis, Māori enterprise is still only 8 percent of all enterprises in Aotearoa, pointing to significant upside for growth in incomes from businesses and opportunities for talent development (Lo'se, 2022, Te Puni Kōkiri, 2020).

Changing Skill Sets Leading to New Opportunities and Business Growth

Between 2006 and 2013, Māori made a shift from low skilled jobs to skilled and high skilled jobs. The number in high-skilled jobs doubled from 2006 to 2018, from 47,472 to 88,608. There was a significant increase in Māori employed as specialist



managers, as well as Māori employed in design, engineering, science, and transport professionals. Māori in business as either employers or employees are dominated by the highest skill category (Skill Level One). (See Figure 9). Just over 50 percent of Māori employers and 40 percent of self-employed Māori are in this category (Reid, Schulze, Green, Groom and Dixon, 2020).



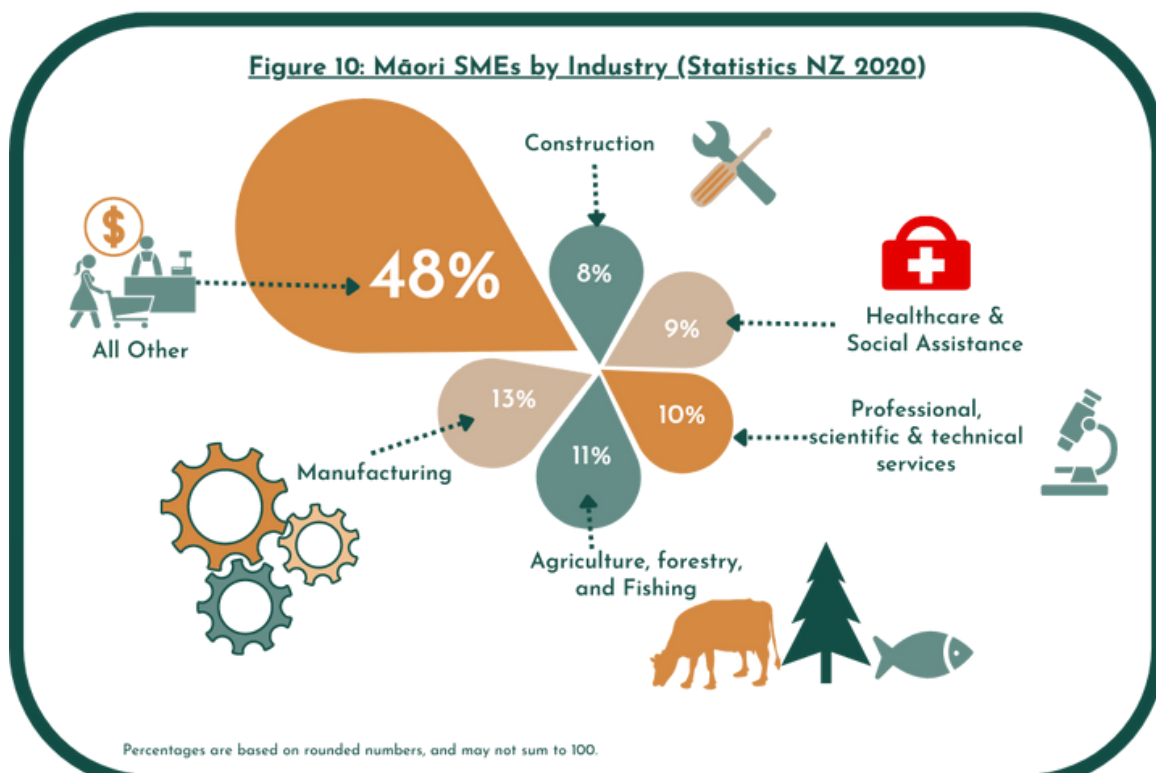
Small to medium Māori enterprises make up 80 percent of the Māori economy asset base. The big three “fishing, farming, and forestry” still dominate in terms of revenue but in the past two decades the Māori economy has broadened dramatically to include film, fashion, food, and a multitude of other enterprises across a broad spectrum of industries (Joshua Hitchcock, 2022).

Māori Industry Sector Features

Statistics New Zealand data shows the following features of the Māori economy as of 2020.

- There are a total of 1,230 Māori authorities.³⁰
- Three-fifths of Māori authorities were classified as essential during COVID-19 lockdowns.
- One-fifth of Māori SMEs reduced the range of goods and services they offered during the lockdown periods of COVID-19
- 50 percent of Māori tourism businesses adapted their business for new markets in response to COVID-19
- Māori authorities exported around \$755 million worth of goods, almost half of which was to China.
- The average Māori farm was five times the size of the average New Zealand farm.
- Total assets for Māori authorities reached \$24.3 billion.
- Māori small-to-medium-sized enterprises (SMEs) are Māori businesses with fewer than 100 employees and are not Māori authorities.

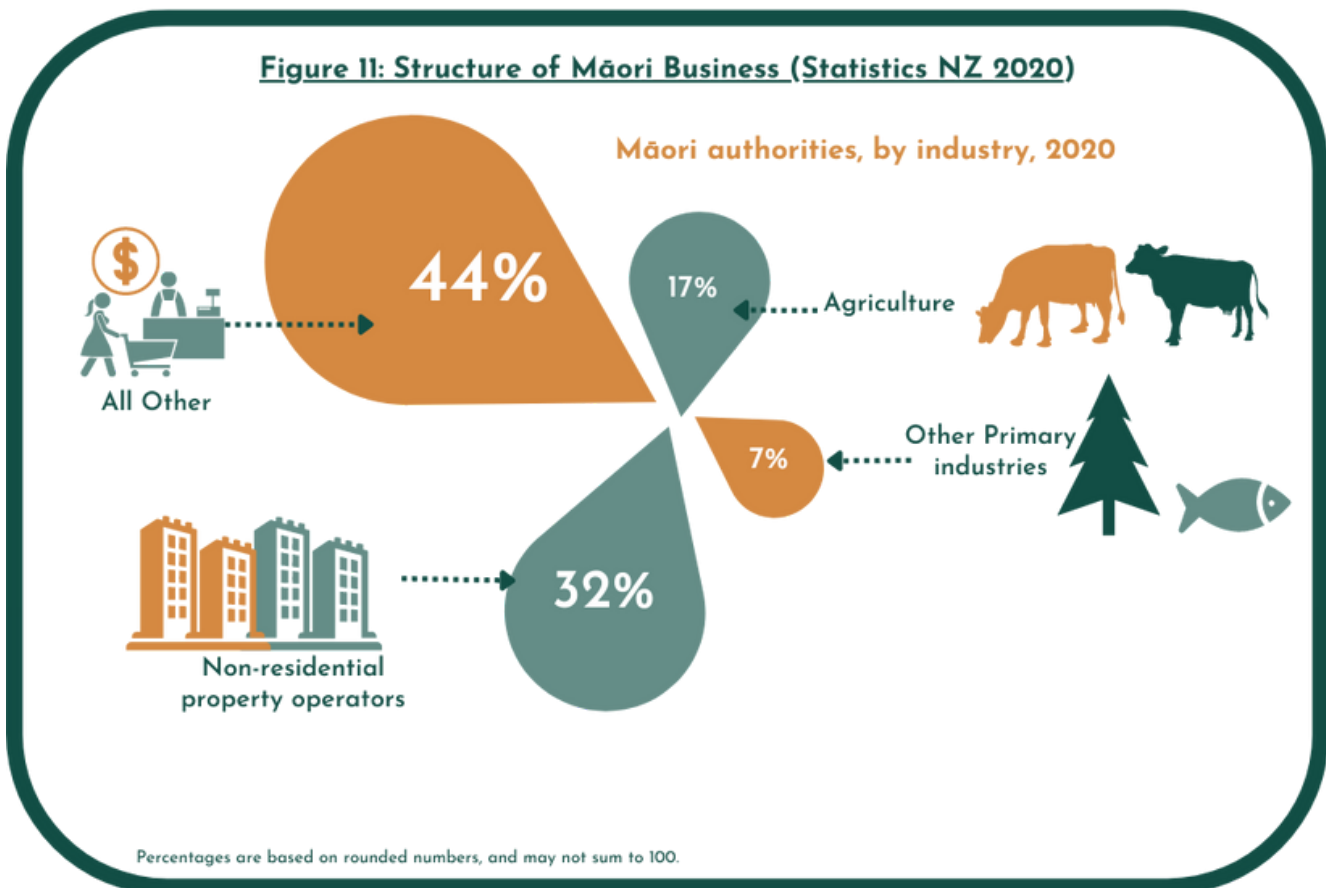
Māori tourism businesses may be either Māori authorities or Māori SMEs. They include businesses in industries such as accommodation and food services; transport, postal, and warehousing; and administration and support services industries (Statistics NZ, 2020).



[30] Māori Authorities are businesses involved in the collective management of assets held by Māori

One-quarter of Māori Authorities are in the primary industries

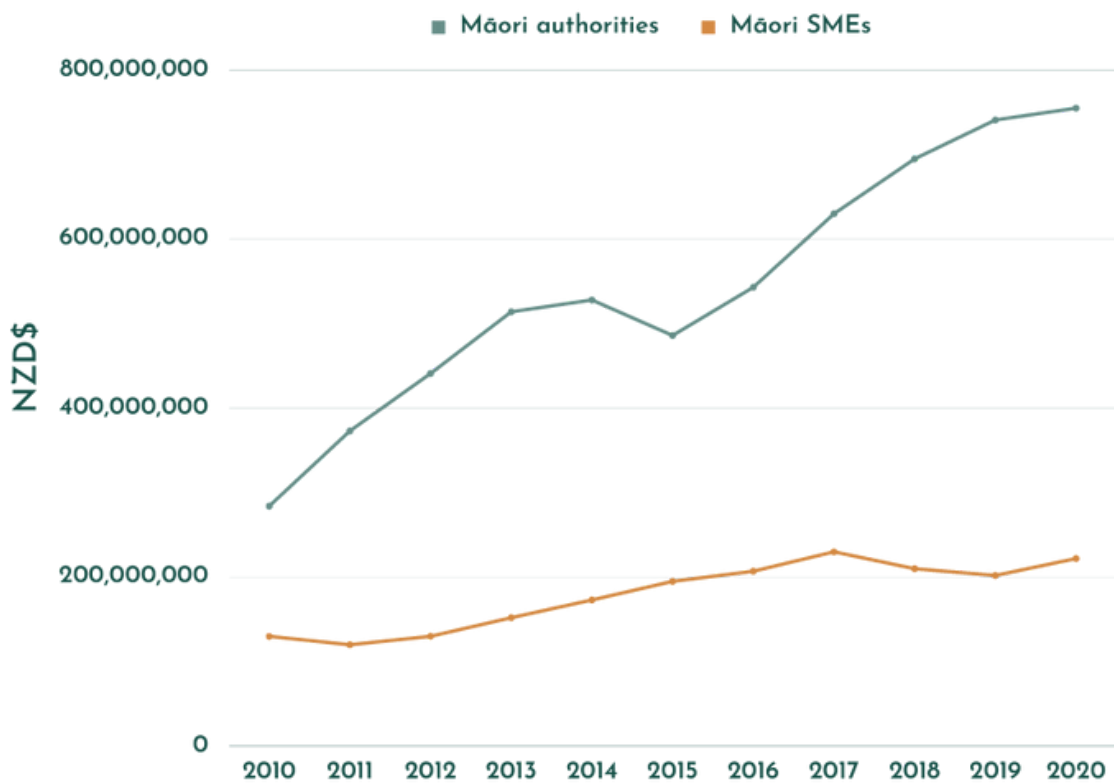
In 2020, 1,230 Māori authorities employed a total of 13,000 people. One-quarter of Māori authorities were in the primary industries, and one-third were non-residential property operators.



Value of Exports to International Markets by Māori business type

- Māori authorities exported \$755 million worth of commodities, 41 percent of which was kaimoana (seafood). Milk powder, butter, and cheese made up a further 20 percent of the value of these exports
- Māori SMEs exported \$222 million worth of commodities in 2020. Almost 19 percent of exports by Māori SMEs were to Australia.
- 47 percent of exports by Māori authorities were to China in 2020, compared with 28 percent of exports by all New Zealand businesses.

Figure 12: Value of Goods Exported by Māori Business Type (Statistics NZ 2020).



SECTION **2**

Māori Values and Māori Business Case Studies



Early History of Māori Contribution to New Zealand Economy

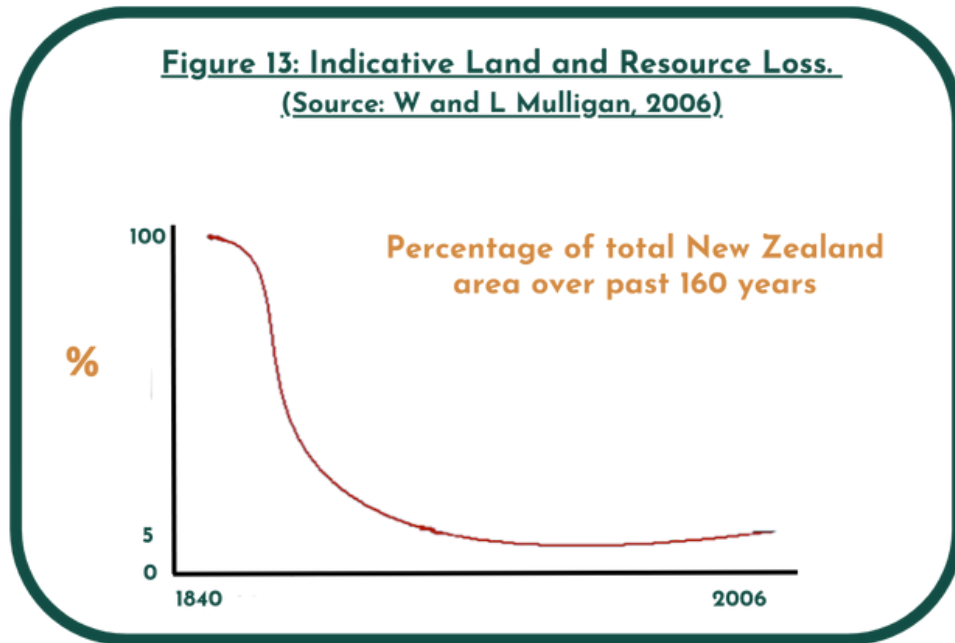
To provide some context to the development of the Te Ōhanga Māori it is important to review some of the history that explains influences on the development of Māori economic activity. The first iteration of the Māori economy is often cited as having started when early whalers and settlers arrived, and the consequent trade that took place between the parties. However, trading for Māori was an embedded part of pre-colonial New Zealand. Trading routes between Iwi and hapu were well established and facilitated the trade of resources abundant in some areas and not others e.g., pounamu (greenstone), kai moana (seafood), and preserved birds.

That the Māori economy was first established in Aotearoa New Zealand several centuries ago has been confirmed by researchers investigating the period before European settlers arrived in New Zealand. Māori leaders like Ngāpuhi chief, Ruatara spent time in Australia realizing that wheat and flour were essential to European diets. Between 1840 and 1860 Māori traders grew and exported these food crops (Hazel Petrie, 2009). The 1840s - 1860s epoch of Māori entrepreneurship is fundamental to what New Zealand was to become with Māori directly responsible for the provision of the resources that enabled early settlers to survive in the often-harsh conditions in New Zealand.

A tipping point for the Māori economy, and for Māori, occurred when the settler population outnumbered that of Māori. What followed were years of dispossession and alienation of Māori from land and resources as the Crown did not adhere to the principles of the Tiriti o Waitangi, (Treaty of Waitangi) signed in 1840 (John Wilson, 2016). Te Tiriti o Waitangi was New Zealand's founding document, and it was meant to establish a partnership between Māori and the British Crown. Although intended to create unity, different understandings of the treaty and breaches of it, have caused much conflict (Claudia Orange, 2012).

Post treaty the Crown confiscation of land, the New Zealand - Māori Wars as well as disease led to a significant decline in the Māori population and alienation of Māori from their land. This had major social cultural and economic impacts with

Figure 13: Indicative Land and Resource Loss.
(Source: W and L Mulligan, 2006).



many Māori moving to the cities, losing their land base and some of their primary industry skills. By 1975, the analysis of data showed Māori only owned just 3% of all land in New Zealand (Joshua Hitchcock, 2022).

The establishment of the Native Land Court in 1862 to investigate title to Māori land led to a wave of land-based businesses being returned to the whenua Māori during the 1900s. This allowed Māori to determine the use of their whenua (land) in their best interests. A second wave led to several iwi owned businesses following the Treaty of Waitangi settlement process which started in the 1990s.

The Waitangi Tribunal was first established in 1975, by the Treaty of Waitangi Act 1975, but it did not cover a wide period of claims. In 1985, the tribunal was empowered to hear historical grievances dating back to 1840. In 1995, the Office of Treaty Settlements (OTS) was established to negotiate and implement the settlement of historical Treaty of Waitangi claims, under the guidance and direction of the New Zealand Cabinet. Cabinet set in 1994 a 'fiscal envelope'³¹ budgeted at \$1 billion.

Since 1989, 54 settlements have been completed, with financial redress (excluding interest and other arrangements) of approximately \$1,500 million and settlements reached in respect of seven of New Zealand's ten largest iwi groups. There are still several settlements to be realised including that of Nga Puhi which is one of the largest iwi groups (NZ Parliament, 2014).

[31] [The 'Fiscal Envelope' and its Consequences](https://www.victoria.ac.nz/nzetc/research/publications/2014/the-fiscal-envelope-and-its-consequences). | NZETC (victoria.ac.nz).

Entrepreneurial Mindset and Adopters of Technology

Since the 1990's Māori businesses have been operating in a third wave, which has seen a proliferation of Māori entrepreneurs and SME owners "making their own mark on the world" through business. "We are thinking generations ahead, we start a business not because we want to see a tidy-as profit margin, although we know that's important, and we can do that now because we understand how the system works. We have learned from the era of colonization and are using this to build our Rangatahi through social enterprise and digital technology" Vincent Egan, CEO - Māui Studios

Academics at Otago University used a lens of 'diverse economies' to explore the complex and multidimensional nature of Māori small and medium-sized enterprises - pākihi Māori. They suggest that this framework will enable a better understanding of the Māori economy in its many distinctive forms... 'that it can more accurately represent the rich diversity of Māori enterprise that has evolved,' Maria Amoamo et al (2018).

Table 2 shows the results of surveys conducted through the annual Business Operations Surveys. It highlights that "Other Māori enterprises" had higher rates of innovation in 2021.



Table 2 : NZ Business that Innovated by Business type*(Source: Stats NZ - Business Operations Survey BOS Series Data Collection - DataInfo+)*

Innovation ¹ type performed	2021 ² Percent
Māori Authorities³	
Goods	13
Operational	20
Organisational	30
Marketing	11
Total innovation rate ⁶	43
Other Māori Authorities⁴	
Goods	25
Operational	31
Organisational	37
Marketing	22
Total innovation rate ⁵	58
All New Zealand businesses⁶	
Goods	18
Operational	21
Organisational	22
Marketing	21
Total innovation rate ⁵	46

Footnotes:

1. Innovation is broadly defined as to include the development or introduction of any new or significantly improved products, processes, and methods. There are four types of innovation: goods (also known as good or service innovation, or product innovation) operational organisational and marketing. It does not include ongoing or abandoned innovation activity.
2. For 2021 we implemented a full coverage of Māori authorities within the BOS scope, that is, those with six or more employees. Caution should be used when comparing Māori authority data for 2021 with data for previous years.
3. Māori authorities are units belonging to economically significant enterprises identified as Māori by the Business Register. Māori authorities are businesses involved in the collective management of assets held by Māori.
4. Other Māori enterprises are Māori businesses that have Māori ownership have self identified the business as a Māori business, are economically significant and are not Māori authorities. Previous releases included data for Māori small-to-medium size enterprises, now expanded to include businesses with over 100 employees.
5. Innovation rate is the proportion of businesses that innovated. This includes businesses with ongoing or abandon innovation activity.
6. All New Zealand businesses included businesses in scope for the Business Operations Survey stock.

Changes to the structure of the Māori Economy have been influenced by the growth of technology-based fields and automation which Māori businesses have been quick to adopt. An example of this includes the establishment of a partnership with Tuaropaki³² to use geothermal energy to drive a milk processing plant at Miraka. This was some twenty years ahead of other companies using geothermal energy. Today Miraka³³ processes three hundred million litres of milk annually and exports whole milk powder, UHT and frozen milk concentrate products to seventeen countries around the world.

“Tuaropaki held geothermal resources and Wairarapa Moana, through their Treaty settlement, owned lands in this part of the Taupo region (sic). While not a cooperative, Miraka is a private company, but with Tuaropaki they operate as a whānau bringing in all the tikanga Māori principles to allow Miraka’s plant uses geothermal steam, producing much less carbon pollution” (Wannan, 2022).

The Mokai dairy plant is located next to some of the largest greenhouses in New Zealand, operated by Tuaropaki. Those are heated by geothermal steam, the by-product of our generators. The steam carries carbon dioxide. Greenhouses and market gardens must feed carbon dioxide in and the by-products of the produce - the green stems not used - then go across the road to the worm farm, mixed with our daf [a dairy farm by-product], and it creates this ecosystem....”(Wannan, 2022)

Values Based approach to Business - Tanga

The 'Tanga values' for many pākihi Māori (Māori businesses) are the foundational values on which Māori businesses are built. As consumers become more environmentally and socially conscious about what they purchase, the ingrained uara (values) within pākihi Māori are creating commercial opportunities around the

[32] Tuaropaki Trust is a Māori Land organisation formed when 297 families amalgamated their land in the 1950's. Their current asset base is over \$1Billion <https://tuaropaki.com/our-story/>

[33] Miraka is a dairy processing company based in Taupō, New Zealand. First established in 2010, at Mokai, 20 minutes north of Taupō, Miraka has one of the lowest carbon footprints in the world. Their plant is powered by renewable 'green' geothermal energy which enable them to achieve 92% less carbon emissions in comparison to coal powered plants. <https://www.miraka.co.nz/> Refer to case study in Section II.

world (Joshua Hitchcock, 2022). Māori business leaders say a values-based approach to business will challenge, evolve, and change how Aotearoa New Zealand as a country does business. "It has to be more than just words on a wall so that hand on heart every one of us can say we're adhering to those values," says Kerensa Johnston, CEO of Nelson based, Wakatū Incorporation.

Impact of COVID 19 on Māori Businesses

COVID, the New Zealand wide lockdown and fallout within the business sector provided Māori with an opportunity to demonstrate their resilience and learn whether the pakihi Māori, 'tikanga values' helped. Tikanga is the set of Māori beliefs based on custom and protocols, values, and practices that have developed over time. They are deeply embedded in the social context, practiced from generation to generation and include Kaitiakitanga,³⁴ Manaakitanga,³⁵ Whakawhānaungatanga,³⁶ and Rangatahi.³⁷ The research by Joshua Hitchcock's team suggested that these values could help Māori businesses withstand the devastating fallout of a global pandemic" (Eugene Carnachan, 2020).

In 2020, after the lockdown finished, the production team from the video series on the Māori Economy returned to re-interview several of the businesses profiled earlier in the series. They found that many businesses had been able to change focus and find new ways to trade. Other data shows that fifty percent of Māori tourism businesses adapted their business to new markets in response to COVID-19 (Stats New Zealand, 2020).

[34] Kaitiakitanga is guardianship or management, e.g., land is considered a resource to be respected according to the principle of kaitiakitanga.

[35] Manaakitanga is hospitality, kindness, generosity, support - the process of showing respect, generosity, and care for others.

[36] Whakawhānaungatanga is the process of establishing relationships, relating well to others.

[37] Rangatahi: young people; the younger generation

Māori Business Focus on Sustainability and Biodiversity

At the heart of Te Ao Māori is the concept that people are closely connected to the land and everything on it. This connection is expressed through kaitiakitanga - guardianship and protection of the environment. As Tangata Whenua (people of the land), Māori see themselves as guardians of the earth, with the responsibility to care for, protect and maintain the environment for generations to come. Te ao Māori (the Māori worldview) has much to teach the world about sustainability.

The values of manaakitanga, kaitiakitanga and whakawhānaungatanga and the way they've shaped relationships for generations mean they take a long term, intergenerational approach to business considering the community, environmental and cultural impacts in everything they do (NZTE, 2023).

Māori have a strong connection to their land and environment, which has led to their focus on biodiversity conservation and management. The Treaty of Waitangi is an important consideration in relation to biodiversity management and is interpreted and given effect to in modern governance arrangements. Customary use of natural resources by Māori is a significant aspect of sustaining Mātauranga Māori.³⁸ Indigenous peoples have played a strong role in conserving biodiversity over many centuries, and Mātauranga Māori could hold some answers.³⁹ The Aotearoa New Zealand Biodiversity Strategy "Te Mana o te Taiao" aims to protect and restore New Zealand's unique biodiversity and taonga (treasures) by understanding the state they are in, the trends that are occurring and the many pressures they face.⁴⁰



[38] Mātauranga Māori is knowledge base on Tradition. See [Māori and Biodiversity](#) link to Environmentguide.org.nz

[39] How Māori Knowledge Could help New Zealanders Turn their Concerns for the Environment into Action <https://theconversation.com/how-maori-knowledge-could-help-new-zealanders-turn-their-concern-for-the-environment-into-action-168831>

[40] Te Mana O Te Taiao <https://www.doc.govt.nz/nature/biodiversity/aotearoa-new-zealand-biodiversity-strategy/te-mana-o-te-taiao-summary/>

Kaitiakitanga is the enduring ethic that stipulates Māori are obliged to actively protect and guard the mauri, tapū⁴¹ and mana⁴² of all their relationships with nature. Such a responsibility is keenly felt within the Māori economy. In a survey of nearly 30 agribusinesses, almost all said that maintaining or enhancing the mauri of the whenua was “extremely important”. Accountability isn’t just tied to ensuring financial viability either - social, cultural, and environmental performance make up Māori businesses’ quadruple bottom line reporting. While the context in which kaitiakitanga is practised may have changed since waka first came ashore in Aotearoa, the environmental ethics of Te Ao Māori remains. As noted by Ngā Pae research leader Professor Chellie Spiller ‘economic success does not need to come at the expense of nature, or the human communities that are a part of nature.’ (Rewiti Kohere, 2023, Mathew Rout, Chellie Spiller et al 2022).

The following section provides examples of Māori owned businesses chosen to illustrate their approaches to managing sustainability in Aotearoa-New Zealand.



[41] Tapu be sacred, prohibited, restricted, set apart, forbidden.

[42] Mana prestige, authority, control, power, influence, status, spiritual power, charisma - mana is a supernatural force in a person, place, or object. Mana goes hand in hand with Tapu, one affecting the other.

Māori Business Case Studies



OKAINS BAY
LONGLINE FISHING



Anagenix.



Okains Bay Seafood



The first example is the New Zealand fishing company Okains Bay Seafood which is turning their would-be waste products such as fish skin and bladders into sought after marine collagen (NZTE, 2023). Using the knowledge of their past (their whakapapa and arrival in New Zealand) Okains constantly looks for ways to 'minimise its impact on the environment, making decisions in every area of the business that are best for the planet, be it out at sea or on the land'. (Okains Company Website, 2023)

The founder and CEO of the company is Greg Summerton (Rākaihautū, Waitaha, Ngāti Māmoē). The website developed by Okains gives the company's history paying homage to Greg's whakapapa and drawing on his ancestral connections to the ocean in longline fishing processes. A key theme of the company is continuing the longlining traditions that were employed by Greg's ancestors - all with a vision to maximise Māori fishery assets through intergenerational growth.

"Most fishing companies around the world know how to produce fresh, quality fish. The only difference we have is the New Zealand brand and our whakapapa. It gives buyers a certain amount of satisfaction that we have a clear desire to look after our environment and business for future generations."

(Greg Summerton, 2020).

The other key message is Okains unwavering drive to provide customers with high value, quality product using sustainable, ethical methods that respect the environment.



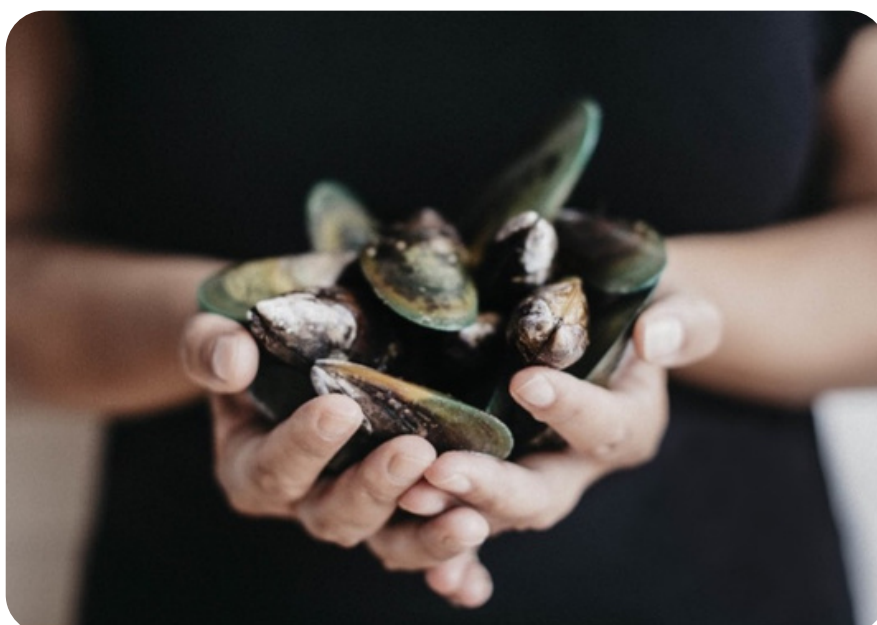
Kono NZ LP

An associated business of Wakatū Corporation, Kono NZ LP is a food and beverage producer and exporter of premium wine, seafood, craft beer, fruit, and natural fruit bars. Aspiring to be the world's leading indigenous food and beverage provider, Kono has a global consumer focus, including a wholly owned trading entity in Shanghai. Kono is a specialist across all aspects of its operations from farming, harvesting, processing and the marketing of seafood, wine, craft beer, cider, apples, pears, kiwifruit, hops and natural fruit bars.

The company farms more than 530 hectares of land and sea and has a geographical spread of export partners across the world. Nelson based, Kono's operations are focused on the Nelson, Tasman, and Marlborough region.

'New Zealand's Greenshell mussels and Pacific oysters are recognised among the world's most sustainable seafoods. Kono grows, harvests and processes mussels at its Marlborough based factory and exports to the Asian and U.S markets. Its marine farm and contracting business provide harvesting, farm maintenance and specialist consultancy advice to aquaculture farmers throughout New Zealand. Kono also fishes, packs, and distributes crayfish (lobster).

'Our connection to the land and sea is at the heart of our identity as Māori. Food and hospitality underpin our way of life' (Kono NZ Website, 2023).



Wakatu through its multiple companies is focused on building partnerships and developing trade with Thailand and many other countries within Southeast Asia. They sell premium products such as Greenshell Mussels to Thailand and have been filling a market gap due to Thailand mussel supplies having been impacted by environmental conditions. Wakatu works in partnership with companies supplying ingredients for a range of products that can support health and wellness.

Interviews with stakeholders at Wakatu Corporation provided some insights on the Te Taihu strategy that they and their community have embraced. The vision for their strategy is: "Tūpuna Pono" which means To Be Good Ancestors. At the heart of their strategy is the wellbeing of the people within Te Taihu (Oranga Te Taihu), which stretches from the West Coast, through Golden Bay, Nelson and the Marlborough Sounds to Blenheim on the East Coast. With a particular focus on the wellbeing of current and future generations, as the current generation, they plan to pass on the taonga (natural resources) of Te Taihu in a better state than when these taonga were placed in their care.





New Zealand's first Māori-owned milk processing company and the world's first to be powered by renewable 'green' geothermal energy. Miraka is the Māori word for milk. Established in 2010 and founded upon a Te Ao Māori world view - kaitiakitanga is a core value of the business, caring for the land, natural environment, and people. Miraka has a low-carbon manufacturing footprint of 92% less carbon emissions than other traditional coal-powered factories. The emission savings is equivalent to taking 7,000 cars off New Zealand roads for one year. In 2011 in the lush green valleys of Mokai, north of Taupō, New Zealand, two Māori-owned organisations joined together to build the world's first dairy-processing plant powered by geothermal energy. Their ambition was to use milk production to bring prosperity to the local community, while applying world-leading sustainable farming practices.

The Miraka dairy plant at Mokai, 30km northwest of Taupō, is one of only two in the world powered by geothermal energy and processes 300 million litres of milk annually. Miraka is one of New Zealand's largest Māori export businesses, sending NZD \$300 million of premium whole milk powder, UHT milk, frozen cream, and milk concentrate and customised milk powders to more than 17 countries around the world.

Miraka has 100 farmer suppliers within a 100km radius of the factory. Farmers become part of Te Ara Miraka, the company's world-class on-farm excellence programme which embraces care for the land, animals, and best on-farm practices. Miraka incentivises its dairy farmers through a combination of loyalty and premium payments of up to 20 cents per kg MS. Miraka is one of the largest employers in the Taupō region with almost 150 staff from 13 different nationalities.

Kaitiakitanga acknowledges that we are all 'naturally connected' to each other, to the land and water, and to the birds, animals, and trees. An impact on one has an impact on all.

Tikanga acknowledges that there is a natural balance to what we do. Our role is to find that balance. Connection (hononga), respect (whakaute), and unity (kotahitanga) are practices that Miraka associate with tikanga. As a result, we do things differently - every day and every hour (Miraka Website, 2023).

As Chief Executive of Miraka, Karl Gradon explained to NZTE interviewers after attending the Te Hono Boot Camp at Aoraki in 2022, *'Kaitiakitanga is not just a strategy, it's a value. We do everything with that in mind.. that's what makes Miraka different - it is about partnering with like-minded and like-hearted organisations'*.

Karl explains during the interview published on the [Te Hono](#) website, that the whakapapa of Miraka started as collaboration when several Māori trusts embarked on a “bold move” to generate more value for Māori business. They partnered with Vietnamese company, Vinamilk, and the Global Dairy Network to form Miraka in 2010.

The company's infrastructure is built on what Karl says is their “taonga”, geothermal energy with steam sourced from Tūaropaki, moving through the processing plant where it is cleaned and reboiled. This ensures Miraka has a 92% lower carbon footprint in their processing facility compared to other coal-fired boilers. These “visionaries” paved the way for the Mokai closed-loop ecosystem that Miraka operates in. This system sees the steam used to power Taupō and the South Waikato District, also power the boilers in Miraka's plant. This is then transferred across the road to heat the greenhouses for local premium produce. The offcuts from this greenhouse and the DAF, a nutrient rich by-product from Miraka, are then combined and used in a worm farm. From there, the worm farm creates compost which nurtures a native nursery, the trees from which make their way back to the local whenua. It is a unique ecosystem and one that firmly grounds Miraka in the community.



Miraka are proud to also have strong relationships with local iwi, hapu, marae, trusts and councils. A long-term aspiration is to have '100 suppliers for 100 years' signaling a long-term focus on strategic partnerships that are grounded in a shared values system.

In the coming years, Miraka will accelerate their kaitiakitanga strategy, focusing on strengthening their existing relationships and ensuring brand partners can extract value from Miraka's unique story. They expect their 100-strong supplier base of dairy farmers to grow to 140 over the next few years.

The next significant development for Miraka will be to tap into hydrogen which is being produced by Tuaropaki Trust (a shareholder in Miraka). Tuaropaki has partnered with Japanese company, Obayashi, to establish Halcyon Power which operates the hydrogen plant not far from the Miraka plant. This hydrogen asset would be the first at scale for New Zealand and could result in the transformation of Miraka's entire truck fleet to hydrogen (Te Hono Website, 2022).



Moana New Zealand

Moana is the largest Māori-owned fisheries company in New Zealand (Aotearoa). Moana NZ was originally Aotearoa Fisheries Limited, which took ownership of a number of Māori-owned fishing companies in 2004 through the allocation of the Māori Fisheries Settlement assets and the passing of the Māori Fisheries Act. Moana NZ owns in trust on behalf of iwi a 50 percent shareholding in Sealord Group Limited. The other 50 percent shareholding is owned by Japanese seafood company, Nippon Suisan Kaisha, Limited.

Headquartered in Auckland, Moana NZ company fishes and harvests solely from the coastal waters around New Zealand, exporting fin fish, lobster, Pacific oysters, wild pāua (abalone) and farmed blue pāua. Their values are noted on their company website.

We fish and harvest solely from the coastal waters of New Zealand. Moana connects the world to the true taste and rare magic of New Zealand's best kaimoana and kai ora.

kei konei mātau kia taea ai te hono mai mō ake tonu atu ki te hā tūturu, ki te mana motuhake o ngā tino kaimoana o Aotearoa.

We are here so people will always be able to share in the true taste and rare magic of New Zealand's best seafood.

hāngai ki te ūkaipō true provenance mo ngā uri whakatipu true for generations

We are one of the world's most pristine and sustainably managed fisheries. Connecting you to the taste of a true and pure place. We have a deep sense of responsibility and respect for our kaimoana, honouring the taonga we have been entrusted with. Taking a long-term view in everything we do; we work in harmony with nature to ensure the sustainability of our fisheries for future generations. (Moana NZ Website, 2023)





Anagenix - Nutraceutical Supplier

Anagenix began operating in 2010. The initial aim was to be a producer of branded ingredients for global nutraceutical, and food and beverage companies. The company started like most others in the primary sector, with a plan, capital, science, and highly skilled and motivated people. They had early success with sales, distribution, investors, high growth, and good market relationships. The thinking was to develop innovative bioactive products from New Zealand horticultural and marine resources. The company's two founders came from diverse backgrounds, one with a science and formulation background, and the other, with experience of building technology companies for niche global markets. The founders then invited in new investors attracting Māori as partners, working with Fomana Capital, a boutique Māori investment company. Anagenix today is solely export-focused.

Anagenix has now developed and trademarked two branded ingredients: Actazin and ApuraGreen, both derived from New Zealand green kiwifruit. Actazin provides ingredients for digestive support as a prebiotics with a unique combination of kiwifruit nutrients and bioactives. ApuraGreen is a paste designed for baking and food preparation to help companies formulating food product to be able reduce salt, sugar, and fat; enhance shelf life and flavours as well as provide a prebiotic to support gut microbiota.

The company has undertaken clinical trials to demonstrate the health benefits both Actazin and a gold kiwifruit ingredient called Livaux . The results have been published and provide good scientific substantiation of the products. The company



has learned since they started that it takes time to learn what consumers want in a product. After five years in the market, they have a deeper understanding of consumers and the potential risks with the current business model. The focus is now understanding what people want when it comes to healthy living and nutrition.

Anagenix has seen the growing investment in gut health and the food-health relationship as well the convergence of pharmaceuticals and nutrition. Today it operates by designing and developing nutraceutical, nutritional products and IP using its knowledge of gut health and dietary intervention to license the use of NZ bioactives.

As Chris Johnson, Managing Director of Anagenix notes, 'our journey has shifted from a focus on products to people. We integrate a design approach through insights with fast prototyping in-market. We incubate ideas and commercialise, secure IP and match the demand to relevant in-market information to potential ingredients from New Zealand' (Te Hono website, 2022)



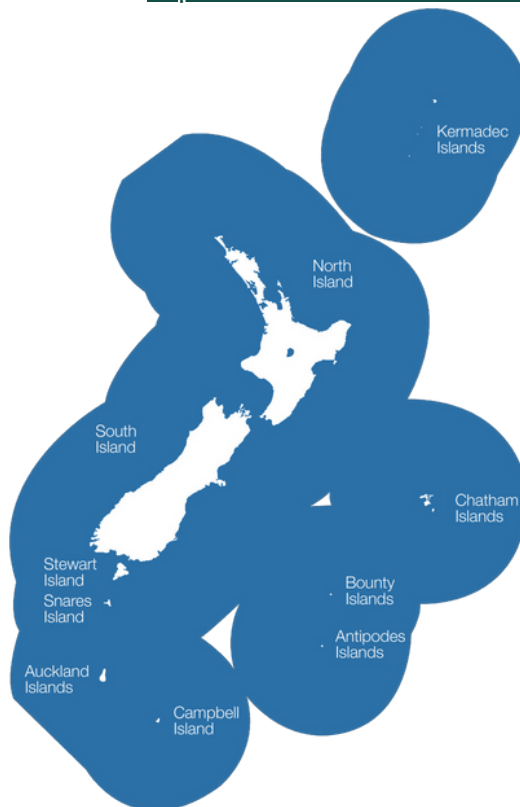
Growing International Opportunities and Trade

The overview of the Māori economy highlights that Māori employers are increasingly prominent, with high numbers of skilled Māori moving into entrepreneurship, developing SMEs and employing considerable numbers of people. Māori collectives and range of business types are delivering wellbeing across several dimensions and through a wide variety of efforts. These include community engagement, participation, and contribution through whānau and family groups, paid employment as well as unpaid voluntary work and Trust and business enterprise activities. Together these are contributing to improved economic and social wellbeing for Māori. The examples of Māori-led companies summarised above illustrate how Māori use resources, carefully managing how their business may impact the environment using technological innovations to sustainably manage their operations in line with their core values. As noted in the next section there are many parallels with the approach taken by those companies adopting the Thai BCG model.

New Zealand's Exclusive Economic Zone (EEZ) includes New Zealand's territorial sea and its continental shelf that covers almost 1.7 million square kilometers (MFAT1, 2023). Māori have a significant share of New Zealand's fishing quota and access to marine life.

Figure 14 - NZ Exclusive Economic Zone

(Source: Most NZ <https://mostnewzealand.com/ocean.html>)



The Regional Comprehensive Economic Partnership (RCEP) was concluded and signed in November 2020. It came into force in January 2022 and is a free trade agreement initially negotiated between the 10 members of ASEAN (Brunei-Darussalam, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Thailand, and Viet Nam) and six regional countries with which ASEAN has existing free trade agreements (Australia, China, India, Japan, South Korea, and New Zealand). The RCEP will play a key role in New Zealand's Trade Recovery Strategy, and it is anticipated that the agreement will add an additional \$186 billion to the world economy. As with all New Zealand's contemporary trade agreements, the RCEP includes a specific provision preserving the pre-eminence of the Treaty of Waitangi in New Zealand.⁴³

Recent decades have seen significant research, information, and effort into establishing the concept of the Māori economy within the context of New Zealand policy, data, and strategic directions. In 2022, dedicated "Māori Trade and Economic Cooperation" chapters were included in the UK-NZ FTA, highlighting the importance of, and underscoring the recognition of Māori business interests to shape New Zealand trade approaches and outcomes (MFAT2, 2022).

The Māori economy has significant potential to expand trade and investment abroad, specifically with countries like Thailand, which shares similar traits being an agricultural-based economy and which also places importance on values such as environmental sustainability, growth of SMEs, and the promotion of local wisdom/traditional knowledge, creative products with Thai identity such as handicrafts and novel foods, that can contribute towards economic development.

[43] [RCEP-Summary-of-Outcomes.pdf \(mfat.govt.nz\)](#)

SECTION **3**

Thailand Economy Overview



INTRODUCTION: Bio-Circular-Green Economy Model and Case Study Examples

In Thailand, since 2021 the Bio-Circular-Green (BCG) Economy concept has been championed by the Royal Thai Government for its Asia Pacific Economic Cooperation (APEC) host year in 2022. It is a promising post-pandemic growth strategy where science, innovation and technology are applied to promote the efficient use of resources, maintain, and restore ecosystems, and reduce waste to build a system where government and business can thrive.



Source: Bangkok Post

Thailand opted for the BCG that aims to use natural assets more efficiently with the least impact on the environment as possible. BCG applies a whole of society approach where the government, private sector, academia, and society, collectively implement this principle, eventually putting Thailand on track to building back a healthier, greener, and more inclusive economy as the pandemic subsides (AsiaOne, 2021).

The Thailand BCG Transformation report⁴⁴ (2022) was a collaboration between the National Research Council of Thailand (NRCT), the National Institute of Development Administration, Sustainable Development and Sufficiency Economy Studies Center and collaborating agencies who conducted the study and edited the book. The eBook which can be accessed online has 40 cases studies providing detailed insights on the rationale of the BCG and the equally important 'Sufficiency Economy Philosophy (SEP) that is the basis for the BCG strategy.

[44] [Thailand's BCG Transformation](#)

The BCG Model success stories show how Thai companies are adopting the BCG Model strategy working towards the goals of sustainable development (SDGs). As noted in the report.

"While Thailand's successes of the 20th century - millions lifted out of poverty, and the creation of basic security, public healthcare, and education - remain well established, the 21st century has brought with it new challenges in the form of climate change, rising inequality, economic volatility, and environmental degradation.

To remedy these, the Thai government has embarked on a national platform known as the Bio-Circular-Green (BCG) strategy. At its heart, this strategy is a pragmatic roadmap leading to a more self-reliant and prosperous economic future for Thailand, one that also allows the environment and local communities to thrive.

The BCG strategy has as its basis the Sufficiency Economy Philosophy (SEP), which encapsulates the decades of leadership, in words and deeds, of His Majesty the late King Bhumibol Adulyadej. His Majesty's Sufficiency Economy Philosophy has given Thailand an inspiring foundation for its pursuit of sustainable development".

Thailand's BCG Transformation (2022)

The BCG and SEP approaches seem to align well with Māori philosophy and ways of being as illustrated in the case study examples in Section 2. The Māori approach includes self-determination through rangatiratanga and mana motuhake⁴⁵. The following whakataurangi (proverb) is from Sir Apirana Ngata⁴⁶, a Māori tribal leader from Ngati Porou, a former politician and scholar.

[45] [Motuhake](#)

[46] [Ngata, Apirana Turupa - Dictionary of New Zealand Biography - Te Ara](#)
[Link to BCG Report](#)

The proverb tells Māori to pursue new knowledge from the world to gain future benefits to grow and thrive while holding true to Māori culture. It is a message of adapting to a changing environment while maintaining core values and is still relevant today.

E tipu e rea mo ngā rā o tō ao	Grow up and thrive for the days destined to you
Ko tō ringa ki ngā rākau ā te Pakeha Hei to ara mō tō tinana	Put your hands to the new world (Pakeha) tools to provide physical sustenance
Ko tō ngākau ki ngā tāonga a ō tīpuna Māori Hei tikitiki mō tō mähuna Ko tō wairua ki tō Atua, Nānā nei ngā mea katoa	Keep your heart to the treasures of your Māori ancestors Your soul to your God, to whom all things belong

The BCG approach aims to contribute to the global efforts of comprehensively addressing all environmental challenges, including climate change, extreme weather, and natural disasters. This BCG strategy has been advanced as part of the national agenda by the Thai government to act as a new economic model for inclusive and sustainable growth aiding post-pandemic recovery. It aims to capitalize on Thailand’s strengths in biological diversity and cultural richness and employ technology and innovation to transform Thailand to a value-based and innovation-driven economy. Aligned with the UN Sustainable Development Goals (UNSDG)⁴⁷ the BCG was the topic of policy dialogues at APEC meetings held in Thailand in 2022. Meetings were held to exchange ideas on how APEC could meet its sustainable economic growth objectives across APEC workstreams and to explore potential partnerships across government, the private sector and academia.

One of the aims of this report is to identify opportunities for Thai enterprises to engage with those led by Māori enterprises and to determine the potential for collaboration using the BCG approach to mutual benefit. Royally initiated and funded projects were first introduced by the late King Bhumibol Adulyadej The Great in the 1960's. Two of these are described in the next section.

[47] [UN SDG goals](#)

Royal Project Foundation

Royal Project Foundation is a Thai non-profit organisation based in north Thailand that was founded by the late King Bhumibol Adulyadej The Great as an umbrella organization for his charitable initiatives and research. Starting work in 1969, the Royal Project Foundation had the aim of improving the quality of life of the hill-tribe people, to diminish their reliance on growing opium while at the same time restoring forest and water resources. Since then, the Royal Project has supported more than 39,277 families, 288 villages, 168,445 people living in the highland through its 38 development centers located in 5 Northern provinces: Chiang Mai, Lampung, Chiang Rai, Phayao, and Mae Hong Son. The Royal Project is based on the King's espoused vision for a Sufficiency Economy Philosophy (see figure over page).

Projects with the Royal Project Foundation have included growing red beans, coffee, wintering trees and cut flowers, among others. Currently there are 4,710 projects that are part of this royal initiative - each one changing, developing, and adapting to the issues that need to be solved in the communities and regions of Thailand⁴⁸. All projects are designed to achieve the main goal of the Royal Project Foundation which is to improve the quality of life of Thai communities.



[48] <https://www.royalprojectthailand.com/>

Figure 15: The Royal Project Model (Source <https://royalproject.org/pageeng/model/>)



Doi Tung Development Project (DTDP)

This project was set up 1988 in the Golden Triangle in Thailand to help change opium cultivation into reforested areas. The Doi Tung Development Project (DTDP) was initiated in 1998 by the late Princess Mother, HRH Princess Srinagarindara. It is the flagship project of The Mae Fah Luang Foundation (MFLF) which was first established by Her Royal Highness, Princess Srinagarindra under Royal Patronage in 1969 as the Thai Hill Crafts Foundation. The goal of this was to help the hill communities by marketing their traditional crafts and support the education of more than 400 ethnic minority youth. Since then, the DTDP has operated for 30 years in northern Thailand's Chiang Rai province covering the Mae Fah Luang and Mae Sai Districts along the border between Thailand and Myanmar. The activities of the Project have ranged from rehabilitation for opium addicts, provision of healthcare and education, to creating alternative ways to earn a livelihood. These have now benefited a total population of 10,000 people across 6 ethnic groups. Recently the Project's contract with the Department of Forestry was extended until 2051 to ensure continuation of the sustainable development programme for local employment and climate change adaptation/mitigation. The Doi Tung community has become self-reliant, resilient, and thriving with a range of livelihood opportunities. The DTDP serves as a 'Living University' for sustainable development, environmental management, minority rights, and social entrepreneurship and has around 900 study visits and training programmes each year.

The focus on empowering people to be at the center of their own development came from the Princess Mother's vision for the Doi Tung Project of "helping people to help themselves." It represents an important cornerstone of the UN 2030 Global Agenda for Sustainable Development. Working alongside the inhabitants of the Nang Non-Mountains in northern Chiang Rai for over thirty years, the Foundation has successfully developed a blueprint for development that is respectful of people's aspirations and their ability to help themselves, is environmentally sustainable, and replicable.

After the Princess Mother passed away in 1995, His Majesty King Bhumibol Adulyadej The Great took the Foundation under his patronage and appointed his daughter, Her Royal Highness Princess Maha Chakri Sirindhorn, as honorary President. The Foundation's mandate is to continue the legacy of the Princess Mother to benefit as many people as possible and to inspire new generations to be responsible citizens⁴⁹.

[49] <https://www.maefahluang.org/en/about/#origin>

BCG Case Study Examples



INTRODUCTION

Below is a summary of four case studies featured in the BCG Transformation report. These were selected to highlight synergies with Māori businesses and identify the potential for engagement between Thai and Māori enterprises. The 40 case studies in the report all demonstrate the potential of the BCG and SEP, drawing on many of Thailand's strengths: its grassroots, local wisdom and culture, sense of entrepreneurship and resourcefulness and its application of a values-based approach to development. To be included in the BCG report the case studies had to meet the following criteria.

- 1) proven track record of success (usually five years)
- 2) represent various aspects of SEP
- 3) cover a key sector of BCG development (e.g., food or tourism) for its region
- 4) present diversity in terms of either geographical location, operation size or application of technology

The Sampran Model

Arus Nawarach transformed a once many storied resort into a centre of organic produce and ecotourism creating an entire value chain based on sustainability principles. The Sampran Model uses two of the principles of SEP. It encouraged farmers to adopt organic farming principles, using at first moderation to expand the idea step-by-step. At first only five farmer families agreed to venture into organic farming with them but today there are 193 families working under the Sampran Model. The approach has encouraged farmers to cut out middlemen and go direct to customers via markets. In this way the livelihood of the farmers has improved, and their debt has been reduced due to spending less on expensive chemicals. Increasing knowledge, another important part of SEP, plays a key role in this case study as the founder Arus needed to seek help from the village head and Subdistrict Administrative Organization to learn about organic farming. This led to producers attending events, sharing knowledge about how to develop sustainable farming, boosting their business acumen, learning to negotiate better prices, as well as creating more value-added products and organic brands. This has helped develop farmers as entrepreneurs and engage the younger generation to sell products online. Today, the enterprise's expansion includes an organic community known as the Suk Jai Market, which is hosted on the Suk Jai resort's grounds. More notably, producers, entrepreneurs and consumers are connected through TOCA (Thai Organic Consumer Association), which is an application through which farmers can track activities and sell their produce directly to consumers who can trace where their food comes from.

Today, the Suk Jai Market generates over 30 million baht (about US\$848,000) in income for organic vendors every year. Every weekend some 60 sellers gather to serve the nutritional needs of 1,400 customers on average. The Sampran Model brings organic producers together with MICE (Meetings, Incentives, Conferences, and Exhibitions) businesses. And today some 19 hotels and three exhibition centers buy 300 tonnes of organic produce through this network per year. The founder is looking to drive systematic change to transform the entire food system and create sustainable futures for the entire organic community while improving the livelihoods of Thailand's 20 million farmers who represent almost a third of the country's population.

Traditional Medicine

During the 1997 Financial Crisis, pharmacist Dr. Supaporn spearheaded the establishment of the Chao Phraya Abhaibhubejhr Hospital Foundation (CAF), commonly known as 'Abhaibhubejhr.' Seventy percent of the profits from the potions, ointments and cosmetics go to support the hospital, which is also dedicated to Western-style medicine with 30 percent of profits going to awareness-raising activities designed to promote the benefits of these age-old tonics. The focus of the founder is the preservation of folkloric wisdom and medicines as much of that wisdom is disappearing as Western-style medicines, devices, hospitals, and clinics proliferate. Places like Wat Pho in Bangkok, a temple known for its traditional Thai massage school and the country's first 'university,' where the recipes for herbal medicines are inscribed on the walls, are now rare. Our success is measured by being able to prompt Thais to realize that the traditional wisdom, herbs and plants that they already have are good things," says Dr. Supaporn. For more than 20 years, Abhaibhubejhr has been at the forefront of herbal medicine in Thailand. It was the very first enterprise to use Indian gooseberries to make cough syrups, veld grapes for hemorrhoid treatment, mangosteen peels for treating wounds and derris scandens vines for musculoskeletal pain.



During the COVID-19 pandemic, they were the first local organization to spread awareness about the potential of strengthening the immune system with green chiretta. The hands-on doctor is proud of how the foundation can care for its network of farmers whilst producing quality, organic herbal remedies and products for the hospital and the public. Some buy their products to resell as retailers. Other communities across the country, some right in Prachinburi where the hospital is located, help to plant herbs that can be made into medicines. These farmers have two-year contracts with the foundation that guarantee them fixed prices. With sales of 400 million baht (about US\$11 million) in 2021 Abhaibhubejhr uses the BCG approach as follows:

- Manufacturing self-reliance: Produces herbal medicines for basic illnesses to enable more affordable, accessible healthcare
- Alternative treatments: Emphasizes the wisdom of ancient knowledge and healing practices using Thailand's biodiversity
- Capacity-building: Runs youth camps to educate children about nature
- Local economy: Connects with villagers, buying their organic produce, supporting them as retailers
- Quality control: Employs certified external audit teams
- Biobank: Plans to establish a garden full of plants with medicinal properties for future research

Hemp Thai

Hemp Thai is one of the pioneers in Thailand's hemp industry. Specializing in organic hemp products, the business is dedicated to empowering the Hmong hill tribe people, promoting new and more sustainable ways of agriculture, and bringing fresh and more creative products to the market. For centuries, the Hmong hill tribe of the mountainous north used this versatile material from the cradle to



the grave for everything from cribs to funerary shrouds. Now the Hmong in Tak are poised to take advantage of the legalization of hemp cultivation to serve burgeoning domestic and international market. The global market value of hemp alone is projected to reach US\$18.6 billion by 2027, with the Thai market expected to grow at a compound annual rate of 126 percent per year over the next five years.

Arthit Ritrawee is the co-founder of HempThai, one of the country's longest-standing manufacturers and exporters of hemp fibers and products. HempThai is dedicated to using every part of the hemp tree to ensure zero waste using the following principles of the BCG model;

- Creative economy: Intellectual and cultural capital to create new hemp products
- Organic: Grows organic hemp that is resistant to bacteria, mold, and dust mite
- Zero waste: All parts of the hemp plant are use
- Value-added products: Hemp used to make food, brick blocks and more
- Research: Work with Thailand Textile Industry to experiment on types of hemp fabrics
- Capacity building: Provides mentors for farmers and Hmong people to grow hemp using good agricultural practices (GAP).

Today, the company helps educate the Hmong people on how to make their products even more valuable to the international market, such as turning fibers into types of threads or promoting natural dyeing techniques and weaving patterns.

In Arthit's words, "This way, the Hmong will be able to improve their quality of life while passing on their heritage." In the future, he plans to locate new areas where production can be expanded. Within the next three years, HempThai plans to build a network of farmers working another 3,000 to 5,000 rai (about 1,200 to 2,000 acres) to supply raw materials to the construction industry.



PlaNeat

PlaNeat is a company aiming to address issues of waste in the production chain. The company's business model aligns with the BCG strategy in several ways, such as by transforming the surplus seafood caught in nets, and creating new foodstuffs for people and natural fertilizers for farmers.

PlaNeat's most innovative initiative is using the leftover fish, known as bycatch, which is trapped in nets and normally thrown away, to create valuable food products. This value creation process started with consultations between PlaNeat and various research bodies and educational institutions, particularly the Prince of Songkla University. While the brainstorming often revolves around developing new products from neglected bycatch species like yellowtail fish or herring, the company and the experts discuss how to market these products in countries like Japan, Hong Kong and China, where demand is high for seafood. This plan is in line with the BCG strategy to "create value-added products through research and technology."

With its prime location flanking the Gulf of Thailand, Songkhla is a longstanding base for both local and commercial fisheries in Thailand. The region's infrastructure is well developed with a good labour force which have helped make Thailand a key player in the Asia-Pacific region's fresh, processed and frozen seafood production chain.

The brainchild of Suthep Chaithanee, an executive of the parent company Southern Seafood Products, PlaNeat Seafood aims to be a forerunner in driving Thai fisheries towards a more sustainable path.



Using the approach to maximize value and minimize waste revealed that often-scraped fish heads and fishbones are a good source of amino acids and IAA hormones. The company developed a decomposition process to turn these inedible castoffs into resources for the agricultural sector. They now produce amino acid-filled fertilizers from marine fish for farmers to experiment with in Songkhla, Phatthalung, Nakhon Si Thammarat, Trang and Satun provinces. These are chemical-free and can be used to accelerate plant growth without ruining the local ecosystems. Farmers provide reports on the growth of their vegetables to measure how the fertilizers help. In another innovation PlaNeat developed bio-calcium in collaboration with the Southern Science Park at the Prince of Songkla University. This is produced from the fish bones left over from processed seafood and is used as a compound for food supplements and cosmetics. PlaNeat applies the BCG as follows:

1. Create Value-added products through R&D: Consulting research agencies and educational institutions on how to convert and develop bycatch into food products, fertilizers, and compounds for food supplements and cosmetics
2. Waste management: Using the by-products to make foodstuffs with a target towards achieving zero waste
3. Producing Aquaculture for food: Use technology to boost the South's economy by highlighting aquaculture as an important food source.

Thailand Strengths



INTRODUCTION

Thailand has strengths in agricultural activities, rich natural resources, and diversity in terms of both biological resources and physical geography and the BCG model focus will be promoting four industries in Thailand. These are agriculture and food; medical and wellness; bioenergy, biomaterial and biochemical; and tourism and the creative economy. This report is looking at agriculture and food industry opportunities that could lead to potential collaborations between Thai companies and Māori enterprises. To provide some context a summary of recent trade between Thailand and New Zealand is provided.

New Zealand - ASEAN Trade

Appendix 6 has a series of tables showing New Zealand trade with Thailand and other ASEAN countries. These were presented at the Māori Business Roundtable meeting held in Wellington with High Commissioners and Ambassadors from ASEAN countries in July 2022. Professor Siah Ang, Director of SEA Cape provided this material.

Thailand and New Zealand Trade

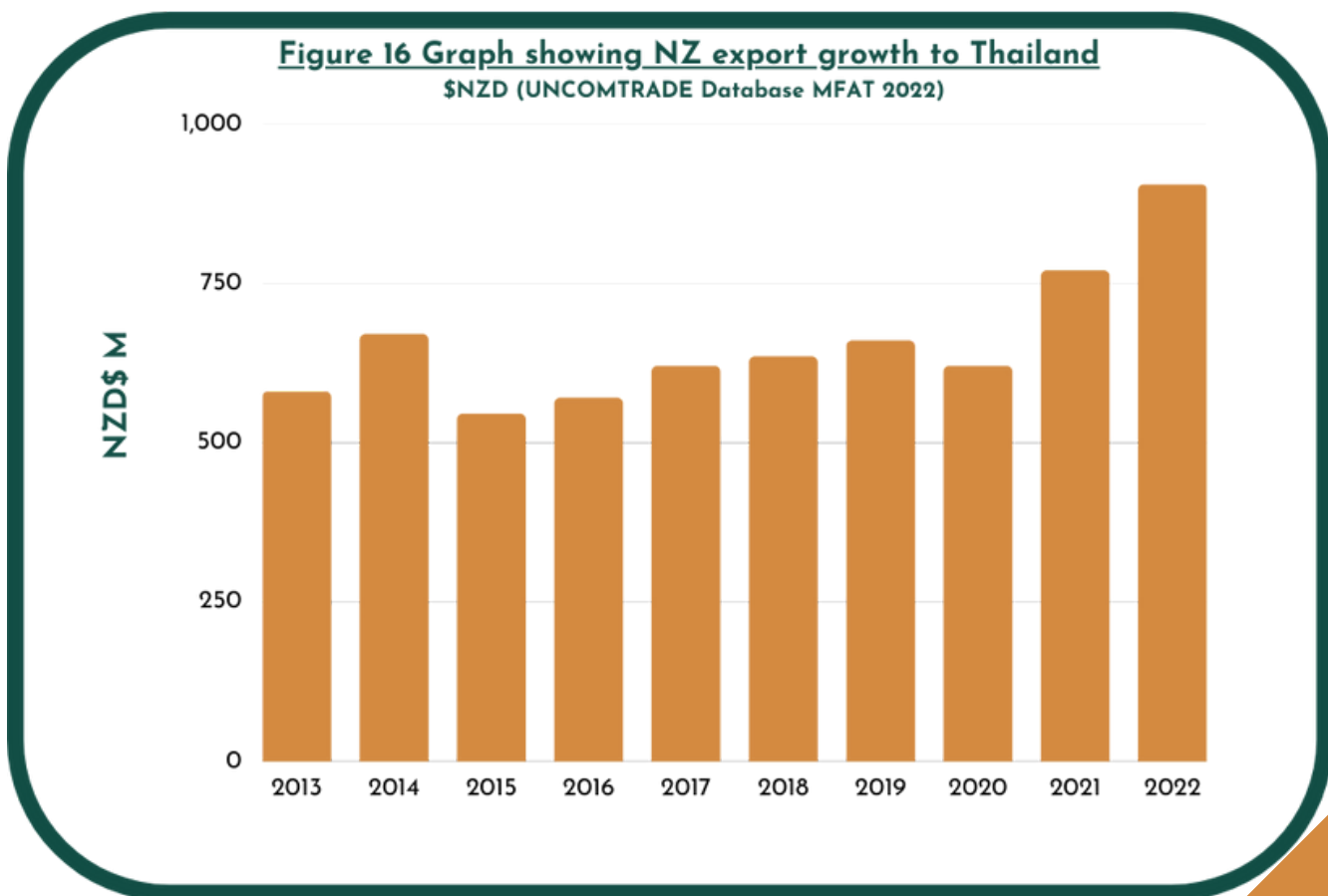
The Closer Economic Partnership (CEP) between New Zealand and Thailand came into force in 2005 and since that time total exports have almost doubled with New Zealand importing twice as much from Thailand as before the CEP. The Thailand CEP is most relevant to businesses trading in goods and making investments. Services are not included yet but are covered in the Free Trade Agreement with Thailand in the AANZFTA. In November 2011, a joint general review of the CEP found the agreement had created significant trade and economic benefits for both countries. Since then, the two countries have been working together to modernise the agreement under a "CEP refresh plan." This includes extending the CEP to include services and government procurement, and a review of the Special Agricultural Safeguards that allow tariffs to be reimposed in certain circumstances (MFAT, 2022).

In 2013, Thailand's Prime Minister Yingluck Shinawatra and a business delegation attended a formal Māori welcome and ceremony in Auckland along with

New Zealand Prime Minister, John Key.⁵⁰ Two agreements were signed at this time by the Prime Ministers, one focused on education partnerships and one on science, technology, and innovation collaboration.

As noted in Section I, the RCEP, negotiated between 10 members of ASEAN and six regional countries, includes Thailand and New Zealand and this was signed in November 2020.

Thailand is now New Zealand's eighth largest two-way trading partner. Trade has also been increasing under the ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA) with total trade in goods between the two countries being NZ\$2.94b in 2020. The graph below illustrates New Zealand export growth to Thailand with Table 3 showing that exports are dominated by commodities, food, and agriculture. While both Thailand and New Zealand (and Māori) would like to aim for high value market segments based on sustainable practice this is yet to be realised. A BCG focus could provide potential for such two-way trade.



[50] [Thailand-NZ aim to increase trade and investment](#)

New Zealand exports to Thailand in 2020 were approximately NZ\$869m (MFAT, 2023) with the main exports (Table 3) being dairy products, fruits and nuts and paper. Thailand exported to New Zealand mainly manufactured goods. Exports to Thailand in 2022 were US\$906.73 million (United Nations COMTRADE 2022).

Table 3: Trade between Thailand and NZ in 2020
(UNCOMTRADE Database, MFAT 2022)

Total Trade	(2020) \$2.94B NZD	Product Mix
New Zealand Exports to Thailand	\$869M	Dairy products; edible fruits and nuts; paper and paperboard
New Zealand Imports from Thailand	\$2.23B	Manufactured goods; Motor vehicles, plastics, tyres, air conditioners and refrigerators

The statistics for Māori enterprises trading with Thailand or individual countries in Southeast Asia are more difficult to get at a granular level. However, Table 4 uses export data from Statistics New Zealand showing that exports from both Māori enterprises and Māori Authorities to “Other markets” increased as a percentage of their total business in 2021 relative to 2020.

As highlighted in previous graphs New Zealand’s top ten exports to Thailand in terms of value are dominated by the primary sectors of food, beverage, and animals.

Table 4: Breakdown of Exports from New Zealand to Thailand
(NZD) (UNCOMTRADE Database, MFAT 2022)

New Zealand Exports to Thailand	Value NZD	Year
Dairy products, eggs, honey, edible products	\$505.64M	2022
Edible fruits, nuts, peel of citrus fruit, melons	\$49.50M	2022
Mineral fuels, oils, distillation products	\$44.37M	2022
Pulp of wood, fibrous, cellulosic material, waste	\$36.76M	2022
Albuminoids, modified starches, glues, enzymes	\$36.46M	2022
Meat and edible meat offal	\$28.31M	2022
Wood and articles of wood, wood charcoal	\$24.97M	2022
Cereal, flour, starch, milk preparations and products	\$24.94M	2022
Fish, crustaceans, molluscs, aquatic invertebrates	\$18.73M	2022
Products of animal origin	\$16.86M	2022

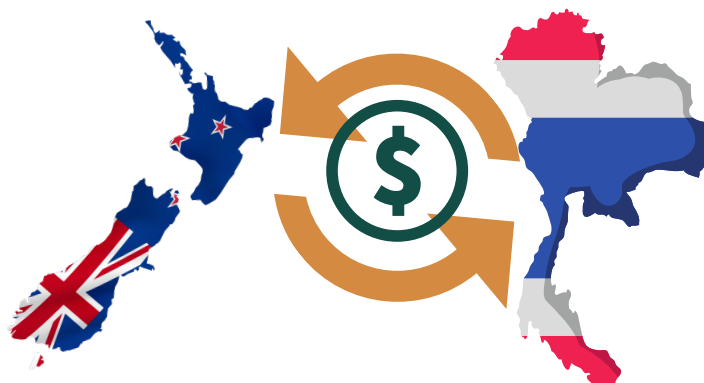
Illustrating the trend of increased meat shipments to Thailand, the New Zealand Meat Industry Association (MIA) reported an increased volume of beef exports to Thailand in 2021. Shipments were up 1425 per cent compared to 2020 making Thailand that year New Zealand’s 10th largest market for beef by volume. MIA CEO, Sirma Karapeeva said a contributing factor for the growth was the removal of beef safeguards initiated when the NZ-Thailand Closer Economic Partnership (CEP) was first negotiated 15 years ago (MIA, 2023).

Opportunities

In 2021 an opportunities assessment report was completed by NZTE to look at the potential market for AgriTech products in Thailand. The market has been valued at NZ\$3.8b per year, but in New Zealand sales of AgriTech-related products to Thailand in 2020 were just NZ\$12m (MFAT,3 2021).

Thailand is a food production hub and is referred to as the food basket of Southeast Asia, contributing around 23% to Thai GDP. Being a large agricultural powerhouse there is strong interest in improving productivity in Thailand which is characterised as having small-scale farms, a declining and ageing pool of farm labour and low farm income. The NZTE report identified opportunities for New Zealand companies as follows:

- The Thai AgriTech industry needs to solve issues in the industry, e.g., increasing crop yields and labour productivity; reducing chemicals in crops; improving access to financing and financial literacy of farmers; improving cold climate vegetable production; and establishing better farm management processes.
- There is potential for New Zealand exporters of AgriTech related to precision agriculture, using drones and satellite imagery, big data for crop management, front- and back-end financial management for farmers, and post-harvest logistics and traceability.
- There are opportunities to collaborate with Thai companies on sustainability initiatives. These could include genetics, water and energy use and dietary supplements to support animal health. In 2020 the Thai Domestic Milk industry was valued at NZ\$3.5b.
- Thailand is the world's second largest producer of cassava and tapioca, and it is a large producer of organic products (rice, ready to eat foods). This could provide opportunities for companies in New Zealand focused on organic markets.
- Thailand has both inland freshwater and coastal/marine aquaculture with farmed shrimp representing almost half of total aquatic yields (MFAT [3], 2021).



SECTION 4 Next Steps



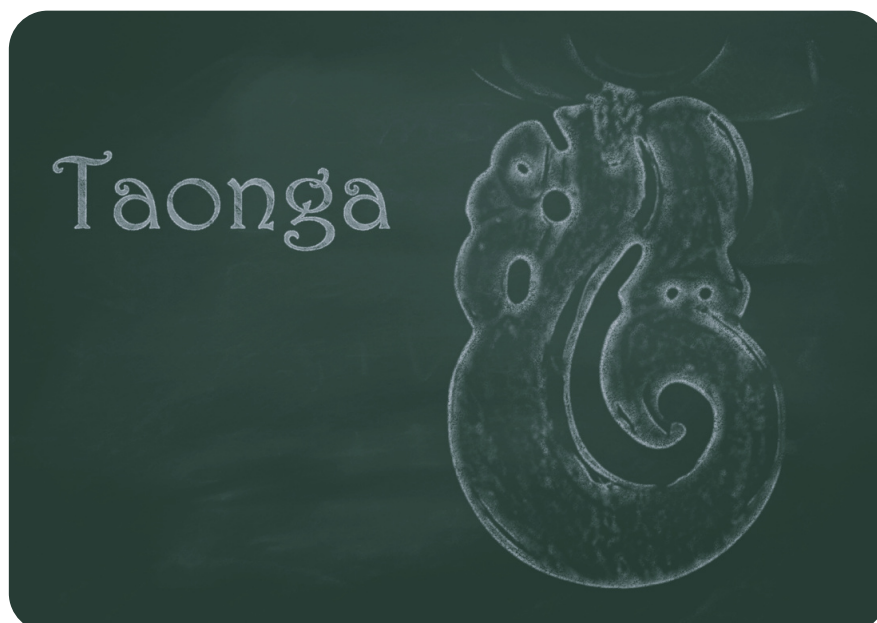
Doing Business with Māori

There is a strategic opportunity for Thailand to become an active business partner with Māori. Māori can provide the following elements:

- Significant and growing asset owners in primary industries (farming, forestry, fisheries)
- Young and dynamic demographic and future workforce
- Growing economic activity that is outpacing the wider New Zealand economy
- Treaty of Waitangi rights, including 'first rights' to certain Crown (government) assets
- Commitment to educational outcomes: application in science, technology, and innovation
- Scalability - partners who can assist in and be active in joint ventures with foreign parties
- Most importantly, values aligned with the Thai BCG with a commitment to developing a sustainable, green, and circular economy.

The Process

As previously outlined Māori and Māori businesses are neither homogeneous nor do they operate in isolation. This is particularly true for Māori businesses that attract investment, invest directly, trade and export internationally. The process for undertaking business with Māori can seem complex and challenging but it does not need to be. Good advice, understanding and a programme of engagement and



and promotion can provide the building blocks. There are four important steps outlined below;

1. **Mātauranga - Understanding Hononga (Connections):**

a. Comprehension is important for engaging with Thailand businesses and government and positioning as a strategic partner. Building an understanding of Māori and in this case, context is critical to creating meaningful relationships and who to have relationships with.

b. This report and the recommendations are part of this process. There is much for both Māori and Thai to learn from each other's cultures. It should also be noted that Māori are attracting more interest from international businesses and governments. For example, the UK High Commissioner now has a Māori advisor on staff⁵¹ and other countries are creating indigenous to indigenous relationships.⁵²

2. **Rangatiratanga - Leadership - Mana Esteemed Interaction:**

a. Māori are accustomed to Rangatira ki te Rangatira - Chief to Chief interaction where leadership engagement and ongoing dialogue is a powerful signal. Mana is about respect and acknowledging authority.

b. Ensuring an approach where leaders from Thailand engage with Māori leaders. Context is important here. An example: if Thailand leaders, such as the Ambassador are to meet Tribal and/or business leaders then understanding the protocol is critical. If it is strictly business leaders, then it will be a blend of protocol and discussions.

3. **Mahi Whakato - Prepare the Foundation:**

a. From meetings with Rangatira and/or business leaders target a few mutual areas to pilot key projects. Make the project(s) mutually beneficial in terms of learning about business opportunities, educational exchanges, and cultural advancement.

b. Include in these projects over time a series of Thailand visits to NZ and NZ visits to Thailand. From these visits there can be further refinement of plans and business opportunities can be shaped.

[51] [UK High commission in New Zealand to recruit Māori adviser and te reo teacher | New Zealand | The Guardian](#)

[52] [Indigenous Business Sector Group - ANZLF](#)

Learning from Each Other Through Engagement

This report has highlighted potential synergies between Māori-led enterprises and Thai companies using the BCG approach to manage their businesses. The Māori and BCG case studies covered in Sections II and III provide some good examples of like-minded approaches to managing business sustainably. Section I highlights how Māori people, and therefore their businesses thrive by using a collective approach that builds on their relationships and connections to iwi, whānau, and hapu. Māori networks support the development of partnerships through regular meetings (hui) to get business done.

Trust based relationships are critical for realising the potential for learning from each other. Key to this process is holding face-to-face meetings to assimilate information and insights while building shared agendas for collaboration and trade. Some initial thoughts about engagement are outlined in Table 5.

Engagement Methods: Initial Thoughts

Māori people, and therefore their businesses thrive by using a collective approach that builds on their relationships and connections to iwi, whānau, and hapu. Māori networks support the development of partnerships through regular meetings (hui) to get business done.

The section above summarises the potential for learning from each other. The key is building information and insights, actioning meetings, and building relationships. To do this some initial thinking is outlined in Table 5 below.

Table 5: Māori and Thai Stakeholder Engagement: Initial thoughts

Activity	Action
Hosting	Set up Māori Tribal/Business and Thailand representatives' meetings, social and commercial
Hui - Operational	Have teams work on specific challenges. Regularly meetings to share information, brainstorm, network and build connections
Trade Delegation/Missions	Arrange two-way (twice yearly) Thailand and Māori trade and site-businesses delegation visits.
Seminars	Agree subjects and run seminars to increase knowledge and exposure
Webinars	Conduct webinars with guest speakers to increase knowledge and exposure to specific sector specialists
Formal Māori Gatherings	Invite Thailand delegates to attend key Māori events, business and cultural and vice versa.

SECTION 5 Recommendations & Further Research



Recommendations and Further Research

The overview provided of the Māori economy and Thailand's BCG strategy shows there is significant potential for engagement between Thai and Māori enterprises. To build on this potential it would be helpful to have in-depth knowledge of Thai companies working in the sectors of interest. To develop such knowledge, there are three recommended actions:

1. Thailand Research Insights: Conduct face to face interviews with four to six Thailand BCG companies and with Thailand policy advisors on BCG. The rationale for holding interviews with Thai businesses will help provide two-way learning, drawing on both primary and secondary data and potentially fast-tracking ways to work together. Speaking with policy advisors will provide background on the BCG as a new policy, learnings about BCG applications, the potential barriers and what might represent new opportunities between Māori and Thailand companies.

2. Delegation Strategy: Create a Thai Māori BCG strategy with the commitment to a 10-year programme holding a series of business and educational meetings with cultural exchanges in both countries. This will help develop a framework through which to build relationships between the parties. It will include co-designing a plan with key objectives and measurable outcomes.

3. Research Māori - Research Thailand: Develop specific research programmes that extend the focus of this report covering the topics identified by the Thai Government to adopt the BCG. The aim would be to bring Māori and Thai researchers together with a focus on identified sectors of interest. This will provide Thailand with research insights on the Māori approach as well providing Māori enterprises more information about Thailand's approach.

Concluding Remarks

This report has shown that the Māori economy is currently worth NZ\$70 billion and is steadily growing at 5 percent per annum. A report by Te Puni Kōkiri, The Ministry of Māori Development shows that it is expected to reach NZ\$100 billion in assets by 2030. Māori values, focus on biodiversity and sustainable practice align well with Thailand's Bio-Circular-Green economy which aims to add value to the

agriculture sector by bringing 21st century insight and technologies to bear on the Kingdom’s biological resources. According to data collected by the Thailand Board of Investment (BOI), in the first nine months of 2020, local and international companies invested USD 1.7 billion in Thailand, with more than 300 projects listed as BCG activities. The Thai Government has noted that the BCG Model is part of the national agenda for the country’s development with a framework focused on farming and food, healthcare and pharmaceuticals, bioenergy, and biomaterials⁵³

This report was limited to providing examples of Māori and Thai companies working in the food and farming sectors, highlighting potential opportunities in these markets. Clearly there are many other potential areas for collaboration and some of these are listed in Table 6 below. As noted above we believe that setting up a programme of research and engagement through a series of meetings focused on different topics is one way to find potential avenues that can facilitate trade partnerships. Developing a plan with specific objectives will be key to this.

Table 6: Further Research Topics/Themes

Thailand-Māori Research	Research Topics
Research programme or series of topics for engagement meetings	Healthcare/nutraceuticals/pharmaceuticals
	Tourism/ecotourism
	Biotechnology and biomaterials
	Agri-technology/ Regenerative Farming
	Marine/Aquaculture
	Bioenergy/Carbon

[53] <https://www.inhousecommunity.com/article/bio-circular-green-new-opportunities-in-thailand-from-buzz-word-to-action/>

Appendices

APPENDIX 1: NZ GDP

Table 7: NZ GDP 2013 - 2018 Statistics NZ

Industry Sector	2013 ²	2014	2015	2016	2017	2018
Agriculture, forestry, and fishing	12155 ³	11842	12494	12815	12987	13081
Mining	3250	3328	3492	3350	2883	3148
Manufacturing	21534	21741	22212	22722	23237	23848
Electricity, gas, water, and waste services	6326	6278	6465	6742	6728	6705
Construction	10998	11563	12563	13463	14486	14785
Wholesale trade	11043	11271	11556	11483	11766	12258
Retail trade and accommodation	13346	13917	14781	15613	16503	17460
Transport, postal, and warehousing	8844	9030	9667	10144	10551	11066
Information media and telecommunications	6776	7398	7970	8487	8225	8383
Financial and insurance services	11938	12457	12846	13160	13880	14550
Real Estate, rental and hiring services	27701	28415	28747	30132	31194	31566
Prof, scientific, technical, admin, and support	19880	20927	21533	22626	24079	25282
Public administration and safety	8871	9162	9446	9727	9924	10341
Education and training	9237	9175	9222	9322	9350	9484
Health care and social assistance	12464	12702	13060	13270	13939	14525
Arts, recreation, and other services	6632	6688	6998	6997	7355	7468
Gross domestic product ¹	206338	211653	219516	227385	235675	243059

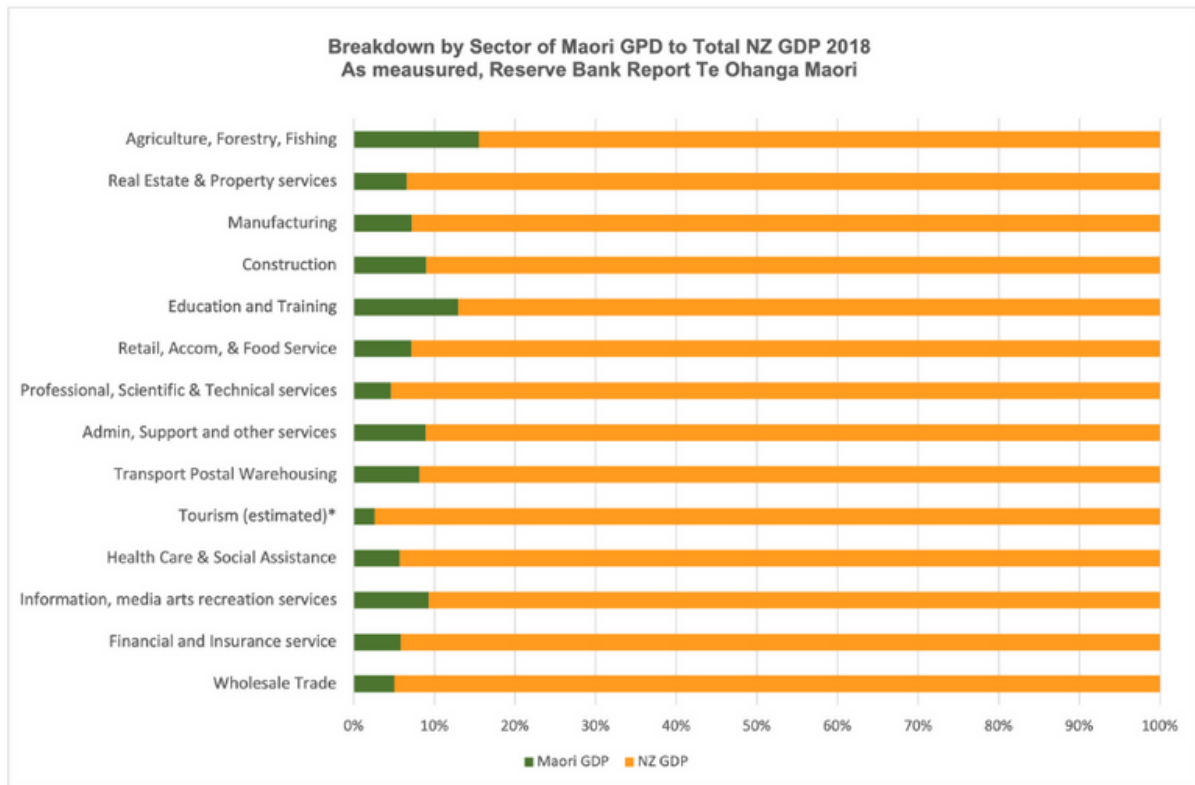
1 - Includes unallocated taxes on production and imports, balancing items

2 - Year End March

3 - NZ \$ Million

APPENDIX 2: TOTAL GDP showing Māori GDP as a percentage

Figure 17: Total GDP Showing Māori GDP at a Percentage as measured in 2018



APPENDIX 3: Primary Industry Exports from New Zealand 2015-2021

Table 8 : Primary Industry Exports from New Zealand MPI 2021

Primary industries export revenue 2015-21 (\$NZ Millions)

Industry Sector	2015	2016	2017	2018	2019	2020	2021
Dairy	14050	13289	14368	16655	18107	19630	19450
Meat & Wool	9000	9200	8355	9542	10176	10430	10680
Horticulture	4185	5000	5165	5392	6111	6400	6530
Seafood	1562	1768	1744	1777	1963	2090	2210
Other primary sector*	2417	2714	2639	2709	2852	3060	3140
<u>Total Food & Beverage Exports</u>	<u>31214</u>	<u>31971</u>	<u>32541</u>	<u>36075</u>	<u>39209</u>	<u>41610</u>	<u>42010</u>
Change year on year		2%	2%	11%	9%	6%	1%
* Includes live animals, honey and processed foods							
Total including Forestry	36079	37323	38220	42700	46329	47870	48865
Change year on year	-7%	3%	2%	12%	8%	3%	2%

Source MPI: [Situation and Outlook for Primary Industries 2021](#)

APPENDIX 4:

New Zealand Exports by Destination 2021

Table 9: NZ Exports by Destination 2021

(Source: Exports by Destination Table 3 Overseas Merchandise Trade Nov 2022, published by Stats NZ Dec 2022)

Destination			Month of			Three months ended			12 months ended		
			November			November			November		
Rank	Code	Name	2021	2022 F	%	2021	2022 F	%	2021	2022 F	%
			\$ (million)		change	\$ (million)		change	\$ (million)		change
Country groups											
	96	Asia	3,400	3,747	10.2	8,837	10,225	15.7	35,651	40,150	12.6
	95	Europe	389	436	12.1	1,270	1,436	13.1	5,869	6,475	10.3
	06	OECD	2,285	2,629	15.0	6,653	7,725	16.1	27,074	30,999	14.5
	01	APEC	4,752	5,243	10.3	12,754	14,703	15.3	50,578	56,743	12.2
	05	EU	254	314	23.8	872	1,043	19.6	4,029	4,681	16.2
	02	ASEAN	415	784	89.0	1,455	2,296	57.8	6,083	8,631	41.9
Top 20 countries											
1	CN	People's Republic of China	2,196	2,020	-8.0	5,194	5,346	2.9	20,052	20,335	1.4
2	AU	Australia	734	815	11.0	2,082	2,479	19.1	7,996	8,643	8.1
3	US	United States of America	545	645	18.5	1,653	1,881	13.8	6,634	7,626	15.0
4	JP	Japan	346	377	9.0	888	948	6.7	3,563	4,150	16.5
5	KR	Republic of Korea	178	211	18.7	495	606	22.5	1,985	2,616	31.8
6	ID	Indonesia	83	157	88.5	271	536	98.0	1,271	2,083	63.9
7	SG	Singapore	85	242	185.5	367	654	77.9	1,219	1,792	47.0

APPENDIX 4: New Zealand Exports by Destination 2021

Table 9 : NZ Exports by Destination 2021 (continued)

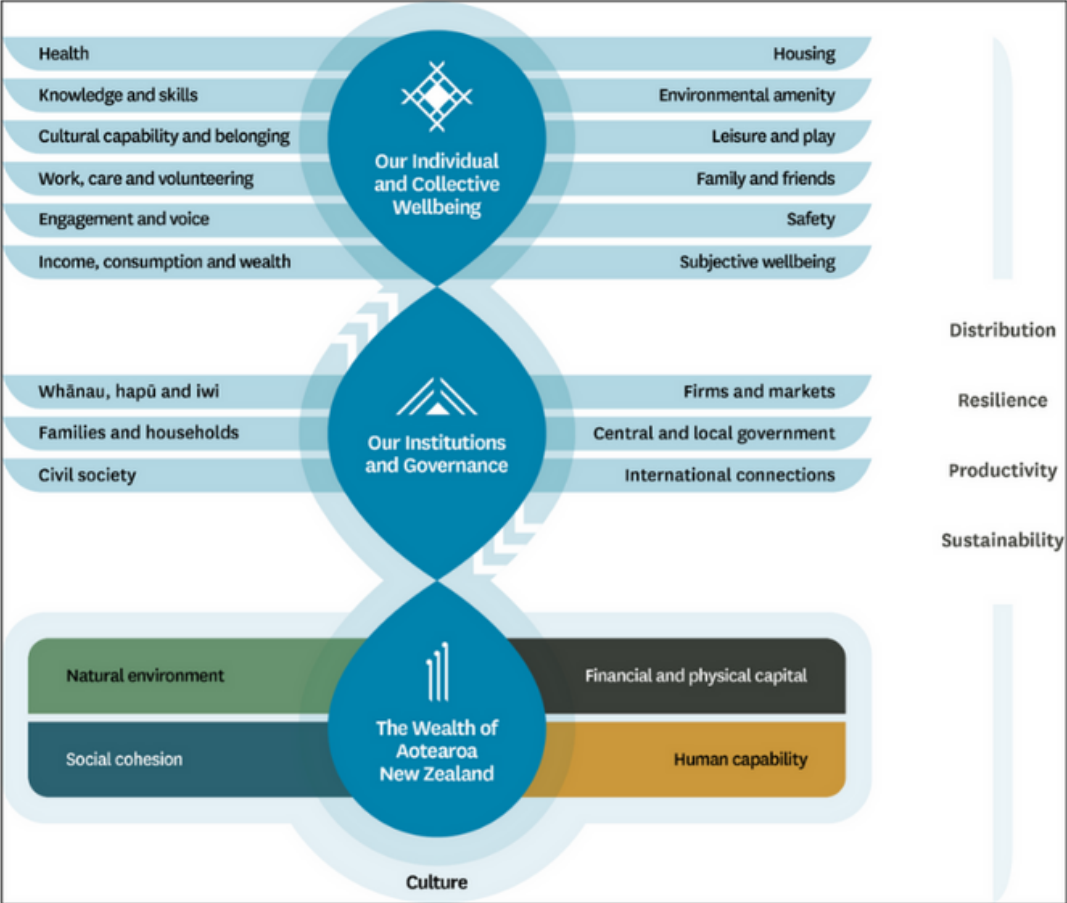
(Source: Exports by Destination Table 3 Overseas Merchandise Trade Nov 2022,
published by Stats NZ Dec 2022)

8	TW	Taiwan	87	127	46.4	298	395	32.8	1,342	1,715	27.8
9	GB	United Kingdom	103	107	4.7	311	352	13.1	1,380	1,494	8.3
10	TH	Thailand	79	114	44.1	250	302	20.7	1,050	1,392	32.6
11	MY	Malaysia	77	115	48.8	234	339	44.8	997	1,366	37.1
12	HK	Hong Kong (SAR)	102	86	-15.1	298	279	-6.6	1,197	1,106	-7.6
13	NL	Netherlands	65	74	13.6	184	252	37.1	773	1,055	36.5
14	VN	Viet Nam	44	85	92.4	160	221	38.0	800	1,013	26.6
15	SA	Saudi Arabia	67	97	44.1	153	260	69.6	594	956	60.9
16	AE	United Arab Emirates	56	100	79.9	160	266	66.1	829	937	13.0
17	PH	Philippines	43	70	60.1	153	232	51.7	670	908	35.7
18	DE	Germany	55	54	-3.2	171	197	15.7	809	894	10.5
19	CA	Canada	76	71	-6.4	185	232	25.5	717	886	23.6
20	DZ	Algeria	15	232	1466.8	29	325	1041.7	263	763	190.1

APPENDIX 5: Living Standards Framework

Figure 18 Living Standards Framework

Source:BERL 2020



APPENDIX 6: Trade ASEAN - Māori Business Roundtable (SEA CAPE 2022)

Figure 19: Why ASEAN; Why Māori

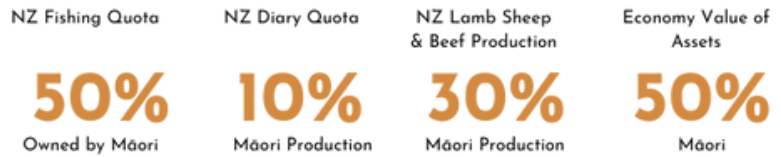
CONTEXT

1. Māori historical ties with Asia
2. Regional and National influence
3. Lift population living standards & incomes
4. Environmental
5. Economic

Why ASEAN?



Why Māori?



APPENDIX 6: Trade ASEAN - Māori Business Roundtable (SEA CAPE 2022)

Figure 20: Total NZ product Exports to ASEAN 2014-2020

	2014	2015	2016	2017	2018	2019	2020
All products (USD)	4,201	3,376	3,367	3,821	3,905	3,829	3,722
As a percentage of ASEAN's total imports	0.34	0.31	0.30	0.30	0.27	0.27	0.29
Top 4 product areas (%)							
Dairy produce; birds eggs;natural honey;edible products of animal origin, not elsewhere...	55.15	49.18	43.70	51.98	49.45	53.09	53.50
Edible fruit and nuts;peel of citrus fruit or melons	3.21	4.49	4.96	4.23	4.31	5.58	5.93
Meat and edible meat offal	4.95	5.19	5.09	5.27	4.80	3.80	4.48
Wood and articles of wood;wood charcoal	4.05	4.73	5.09	4.83	6.80	4.67	4.41
Total of Top 4 product areas	67.36	63.59	61.33	68.27	67.74	70.42	68.32

APPENDIX 6: Trade ASEAN - Māori Business Roundtable (SEA CAPE 2022)

Figure 21: NZ Product Exports by ASEAN Country (2018-2020)

USD \$Million	Phillippines			Malaysia			Thailand		
	2018	2019	2020	2018	2019	2020	2018	2019	2020
NZ Product Exports to X	529.2	563.2	469.9	701.4	693.8	682.3	637.9	639.3	617.1
NZ Product Imports from X	99.9	95.3	84.5	1429.7	1339.1	1067.3	1927.8	1763.1	1478.1

USD \$Million	Vietnam			Indonesia			Singapore		
	2018	2019	2020	2018	2019	2020	2018	2019	2020
NZ Product Exports to X	480.1	522.6	533.1	676.2	684.9	696.5	834.6	678.5	671.5
NZ Product Imports from X	641.2	697.3	630.8	644.7	677.0	656.5	1474.5	1218.8	1006.7

Source: SEA CAPE

APPENDIX 6: Trade ASEAN - Māori Business Roundtable (SEA CAPE 2022)

Figure 22: NZ Service Trade by ASEAN Country (2016-2018)

USD \$Million	Philippines			Malaysia			Thailand		
	2016	2017	2018	2016	2017	2018	2016	2017	2018
NZ Service Exports to X	147.6	184.0	208.3	179.6	211.7	215.9	149.0	162.0	182.0
NZ Service Imports from X	75.2	90.2	112.8	94.0	97.3	95.5	126.0	139.3	161.2

USD \$Million	Vietnam			Indonesia			Singapore		
	2016	2017	2018	2016	2017	2018	2016	2017	2018
NZ Service Exports to X	57.8	73.9	82.3	75.2	91.7	98.3	274.3	305.5	323.8
NZ Service Imports from X	46.6	56.8	59.5	83.5	91.7	127.3	931.4	911.6	987.4

Source: SEA CAPE

APPENDIX 7: Glossary of Terms

(Source: Maria Amoamo et al. (2018))

Hapu	sub-tribe(s) that share(s) a common ancestor
Iwi	tribal kin group; nation
Kaitiakitanga	guardianship or management, e.g., land is considered a resource to be respected according to the principle of kaitiakitanga.
Kaupapa Māori	Māori topic/event/ enterprise run by Māori for Māori
Mana	prestige, authority, control, power, influence, status, spiritual power charisma - mana is a supernatural force in a person, place, or object. Mana goes hand in hand with Tapu, one affecting the other.
Manaakitanga	hospitality, kindness, generosity, support - the process of showing respect, generosity, and care for others.
Mātauranga	knowledge, tradition, epistemology
Mana Motuhake	separate identity, autonomy, self-government, self-determination, independence, sovereignty, authority - mana through self-determination and control over one's own destiny.
Pākihi	business, enterprise, venture
Rangatahi	young people; the younger generation
Runanga	a Māori assembly or council
Tapu	be sacred, prohibited, restricted, set apart, forbidden
Tikanga	customs and practices
Whānau	family; nuclear/extended family
Whakauaki	proverb
Whakapapa	whakapapa is the Māori word for genealogy and can be interpreted literally as 'the process of layering one thing upon another' (Ngata [1944] 2011, p. 6). For many, everything has a whakapapa. Accordingly, there is a genealogy for every word, thought, object, mineral, place, and person (Roberts 2015).
Whakawhanaungatanga	process of establishing relationships, relating well to others.

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