Respectively, Research Assistant and Professor of International Trade Policy, Lincoln University.

This research was sponsored by the Foundation for Science and Technology, contract number IER 801.
The Agribusiness and Economics Research Unit (AERU) operates from Lincoln University providing research expertise for a wide range of organisations concerned with production, processing, distribution, finance and marketing.

The AERU operates as a semi-commercial research agency. Research contracts are carried out for clients on a commercial basis and University research is supported by AERU through sponsorship of postgraduate research programmes. Research clients include Government Departments, both within New Zealand and from other countries, international agencies, New Zealand companies and organisations, individuals and farmers. Research results are presented through private client reports, where this is required, and through the publication system operated by the AERU. Two publication series are supported: Research Reports and Discussion Papers.

The AERU operates as a research coordinating body for staff in the University. It can call upon the expertise of staff in all six divisions of the University and has close links with the Commerce Division (45 academic staff), Applied Management and Computing Division, and Human Sciences Division.

The major research areas supported by the AERU include natural resources and public policy, agricultural economics, rural sociology, marketing (both institutional and consumer). In addition to the research activities, the AERU supports conferences and seminars on topical issues and AERU staff are involved in a wide range of professional and University related activities.

Founded as the Agricultural Economics Research unit in 1962 from an annual grant provided by the Department of Scientific and Industrial Research (DSIR), the AERU has grown to become an independent, major source of business and economic research expertise. DSIR funding was discontinued in 1986 and from April 1987, in recognition of the development of a wider research activity in the agribusiness sector, the name of the organisation was changed to the Agribusiness and Economics Research Unit.

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Preface

Market share data provide useful information for researchers. This publication displays New Zealand data for a 31 year period 1966-96, a significantly longer period than in previous New Zealand market share studies. The report provides graphs of New Zealand exports by SITC code for the fifteen most important New Zealand exports to 84 countries. New Zealand import data are analysed for nine products and nine commodity groups from 20 countries. The publication reports the dynamics of New Zealand Export Market Shares and may provide a stimulus to shift share analysis and other studies by international trade researchers.

Ross Cullen
DIRECTOR
Market share data are a very useful indicator of the competitiveness of firms and industries in directly measuring the volume of sales of one firm relative to others. Export market shares for a nation similarly measure the relative sales performance of the country in terms of market access changes to foreign markets as well as firm and industry performance factors.

There is a shortage of regularly available data in New Zealand on export market shares by product and by country market. Statistics New Zealand and the Ministry of Foreign Affairs and Trade (MFAT, 1997) regularly publish New Zealand export and import data in a variety of forms but they do not examine our exports in relation to exports from competing countries. Brownie and Dalziel (1993) carried out a market share analysis of New Zealand exports from 1970-84 using United Nations bilateral trade data for New Zealand and all other suppliers to our major foreign markets. This was in the form of a shift-share analysis. This work was extended by Lattimore and McKeown (1995) using data to 1993 from the same source. This report provides the same base data as these two reports for the period 1966-96 but without the shift-share analysis. It is essentially a statistical publication.
CHAPTER TWO

DATA AND METHODOLOGY

Data was obtained from the United Nations (COMTRADE) trade database for all countries who are members of the organisation for total exports and imports of products at the single digit SITC level plus 4-digit data for beef and sheepmeat and 2-digit data for dairy products, fruit, hides, wood, pulp and paper, textiles fibres and non-ferrous metals (aluminium). These 15 commodities comprise New Zealand's most important export categories. A full listing of the product categories and country coverage are given in Annex 1.

The nominal value of trade data was deflated by the US GDP deflator (1996=1.0) index to provide estimates of the real value of trade (as a proxy for the quantity of trade).

A number of countries had to be excluded from the base data set because data series for some countries were incomplete or contained obvious errors. The basis upon which these exclusions were made is outlined in Annex 2. The exclusion rules were developed to ensure that there was sufficient data to show a trend over the whole period but also to ensure that future analysis of the effects of economic reform in New Zealand on trade could be carried out. This latter analysis will require at least two data points around 1967, 1984 and 1995.
CHAPTER THREE
REAL EXPORT AND IMPORT TRENDS

3.1 Export Trends

The graphs of this section show the trends in real exports from New Zealand (NZ) by product group and for each of 84 countries. The vertical scales of the various graphs differ and show that NZ is a major exporter of natural resource based products including the groups of total food, beverages, total crude materials, mineral fuels and non-ferrous metals. Over the period, the fastest growing real exports have been for dairy products, fruits (mainly apples and kiwi fruit), beverages (beer and wine), wood, pulp and paper, mineral fuels, non-ferrous metals (aluminium) and also chemicals, machines (machinery and transport equipment) and miscellaneous manufacturers (more elaborate or finished goods). The real export value (REV) of beef, sheepmeat, hides and oils have been more static while textile (wool) exports have fallen. The REV trends of NZ's major export products can be seen in Figures 3.1 to 3.5 and trends for the rest of the goods can be seen in Appendix-A.
The changes are the result of a numbers of key factors. Market access has been increasingly restricted over the period for beef and sheepmeat in large part as a result of the entry of the UK into the EU in 1973/74. Market access has been dramatically improved vis a vis Australia through the CER agreement (1983) though the growth in exports was rapid prior to that date. The ‘think big’ projects, including the Tiwai Point aluminium smelter (1971) and the Taranaki methanol plant (mid 1980’s), have boosterized export capacity in these product areas. Niche marketing short production run products where NZ is thought to have a comparative advantage has also played a role in growth. This has occurred in a wide variety of product lines including fruits and vegetables, finished goods and machinery and equipment.

NZ’s REV trends to 84 countries are analysed under nine country groups. By the early 1980’s with the application of more liberal exchange rate and trade policies, NZ’s real export value has experienced a sustained increase in most markets. While the European Union (EU) (except UK) has been a major export market for NZ during the whole period, Other Asia, Middle East, Pacific Island Nations and Latin American markets were gaining importance especially by late 1970’s. The REV to UK, which was the main trade partner of NZ until the 1970’s, has been declining. This caused NZ to search for alternative markets particularly in Asian
countries. During the period, the other decreasing REV trends can be seen in France, Greece, Netherlands, South Africa and Jamaica. However, considering the relative size of export values, the decreasing REV trends to those countries are not so dramatic as with the UK. The REV of NZ to other main trade partners (Australia, Japan, USA) have also experienced a sustained rise during the whole period. A summary of the countries that are gaining importance according to their relative size in REV of NZ in the period of 1966-96 can be seen in Table 3.1. The REV trends of NZ to major trade partners and to selected recently growing markets can be seen in Figures 3.6 to 3.13, (the REV trends for the remaining countries are given in Appendix-B).

Table 3.1
REV Trends to Major Export Markets

<table>
<thead>
<tr>
<th>Major Export Markets of NZ</th>
<th>1966-1996</th>
</tr>
</thead>
<tbody>
<tr>
<td>with an increasing trend</td>
<td>EC: Belgium, Denmark, Germany, Italy, Portugal, Spain, Sweden Other OECD: Australia, Canada, Japan USA</td>
</tr>
<tr>
<td>with a decreasing trend</td>
<td>EC: France, Greece, Netherlands, UK Africa: South Africa Latin America: Jamaica</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>EFTA: Switzerland</td>
<td>Middle East: Egypt, Jordan, Kuwait, Saudi Arabia</td>
</tr>
<tr>
<td>Africa: Algeria, Morocco</td>
<td>Pacific Isl. Nat.: Fiji, Papua N. Guinea Other Asia: China, Hong Kong, India, Korea Rep., Indonesia, Malaysia, Nepal, Pakistan, Philippines, Singapore, Sri Lanka, Thailand Latin America: Argentina, Brazil, Chile, Mexico, Peru, Venezuela Other OECD: Turkey</td>
</tr>
</tbody>
</table>
3.2 Import Trends

NZ's real import value (RIV) trends are analysed for 9 products and 9 commodity groups and for 20 countries, (the list of products are given in Annex 1). The vertical scales of the various graphs in Figures 3.14 to 3.16 and in Appendix-C show that, NZ is a major importer of industrial based products for the whole period, including mineral fuels, chemicals, total basic manufactures (excluding aluminium) and machines (machine tools and equipment). NZ's natural resource based products (total food, beverages, hides and skins, wood, paper and paper products, textile, oils and fat) do not have a significant share in total imports. However, the RIV trends of beef, sheepmeat, fruits, beverages, hides and oils have been growing especially from the 1980's consistent with the reduction of trade barriers since that time. Except for the years 1981-82, there has been only a small change in dairy imports during the period. It should be noted that the dairy import spike in the early 1980's was the result of extraordinary imports of US dairy products for reprocessing and re-export. The RIV trends in wood, pulp and textile exhibit a declining trend whereas there is only a slight change in imports of mineral fuels.

Figure 3.14: Imports of NZ-Chemicals (5)

Figure 3.15: Imports of NZ-Total Basic Manuf. (6)

Figure 3.16: Imports of NZ-Machines (7)
NZ’s RIV trends from the main trading partners (Australia, Japan, UK, USA) exhibit a sustained growth for 1966-96 except for UK. Among the 20 countries, UK is the only one for which NZ’s imports have been declining since the beginning of the period. This is mainly caused by UK’s entry into EU. The general trends also show that real import values have been growing faster for Middle East and Other Asia countries especially in the second half of the period, which is the period of more liberal exchange rate and trade policies. The only country for which the RIV trend of NZ has not been changing significantly is Canada. The RIV trends with main trade partners can be seen in Figures 3.17 to 3.20, (for the remaining markets see Appendix-D).
CHAPTER FOUR

EXPORT MARKET SHARES

For each product, the export market share (EMS) is calculated by dividing the export value of NZ by the total import value of the relevant country from all sources and expressing it as a percentage. Depending on the relative significance and trends of the real export and import value of commodities over the period, export market shares in various markets are classified and analysed as natural resource based or industrial products. The natural resource based group covers beef at four digit SITC level, dairy products, fruits, hides and skins, wood, pulp and textile products and non-ferrous metals at the two digit level, beverages, mineral fuels and oils and fat at one digit level. Market share analysis for certain countries in beef and for sheepmeat are excluded from the study as the foreign import data in these products exhibit major errors. The industrial based group for this analysis includes chemicals, machinery, basic and miscellaneous manufactures at the one digit aggregated SITC level. For both the commodity groups the analysis emphasises the product and country markets in which NZ has a large EMS (greater than 5%) and particularly the markets which are gaining or losing importance compared to the first period (1966-early 1980's). For the products and markets which NZ doesn’t have a significant EMS, medium sized (1% < EMS < 5%) markets are examined. In order to see the differences between various product markets and changing market performance for the whole period, the data are arranged under tables and the significant market trends are given in figures. Product and country based EMS trends which are not given in text can be seen in the related appendices.

4.1 EMS in Natural Resource Based Products

Beef (fresh and frozen) and dairy products are the main export commodities of NZ according to both relative size of EMS’s and the range of the importer countries. In Table 4.1 and 4.2 it is seen that the major export markets for these products are Other OECD, Other Asia, Pacific Island Nations (Fiji, Papua N. Guinea) and Latin American (Barbados, Jamaica) countries. However, the overall EMS’s for these products exhibit different trends for the period. While EMS of beef have been decreasing during the period and NZ's beef exports seem to lose its significance in several markets (see Table 4.1), EMS's of dairy products have been experiencing a sustained increase in some of the major markets during 1966-96 and also EMS’s have gained importance in some markets compared to the first sub-period, 1966-early 1980’s, including, the Middle East, Latin American and African markets (see Table 4.2). In Figures 4.1-10 NZ’s EMS trends in major markets for beef and dairy products are presented, (for the rest of the markets see Appendices F and G).
Table 4.1 
EMS Analysis for Beef

<table>
<thead>
<tr>
<th>Markets with Large EMS: (5% &lt; EMS)</th>
<th>1966-96</th>
<th>from 1966-84 to 1985-96</th>
<th>Increasing Trend for 1985-96</th>
</tr>
</thead>
<tbody>
<tr>
<td>-major markets for whole period</td>
<td>Australia, Canada, USA, Fiji, Papua N. Guinea, Hong Kong, Indonesia, Korea Rep., Malaysia, Singapore, Barbados, Jamaica</td>
<td>Malaysia</td>
<td></td>
</tr>
<tr>
<td>-markets gaining importance w.r.t. EMS</td>
<td>China, Oman</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-markets losing importance w.r.t. EMS.</td>
<td>Japan, Philippines, Fr.Guiana, Denmark, Cyprus, Malta, Saudi Arabia</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 4.1: NZ-Indonesia: Beef

Figure 4.2: NZ-Philippines: Beef

Figure 4.3: NZ-Australia: Beef

Figure 4.4: NZ-Japan: Beef
Markets with Large EMS: (5% < EMS)
- major markets for whole period
  - Australia, Japan, USA, Fiji, Papua N. Guinea, Indonesia, Malaysia, Mauritius, Philippines, Singapore, Sri Lanka, Thailand, Barbados, Jamaica, Mexico, Venezuela, Portugal, UK
- markets gaining importance w.r.t. EMS
  - China, Korea Rep., Algeria, Morocco, Tunisia, Argentina, Colombia, Ecuador, Guatemala, Poland, Panama, Honduras, Bahrain, Egypt, Jordan, Kuwait, Saudi Arabia
- markets losing importance w.r.t. EMS
  - Kiribati, Pakistan, Costa Rica, Malta

Table 4.2
EMS Analysis for Dairy Products

<table>
<thead>
<tr>
<th>Markets with Large EMS: (5% &lt; EMS)</th>
<th>1966-96</th>
<th>from 1966-84 to 1985-96</th>
<th>Increasing Trend for 1985-96</th>
</tr>
</thead>
<tbody>
<tr>
<td>major markets for whole period</td>
<td>Australia, Japan, USA, Fiji, Papua N. Guinea, Indonesia, Malaysia, Mauritius, Philippines, Singapore, Sri Lanka, Thailand, Barbados, Jamaica, Mexico, Venezuela, Portugal, UK</td>
<td></td>
<td>Australia, Malaysia, Jamaica, Sri Lanka, Thailand, Barbados.</td>
</tr>
<tr>
<td>gaining importance w.r.t. EMS</td>
<td>China, Korea Rep., Algeria, Morocco, Tunisia, Argentina, Colombia, Ecuador, Guatemala, Poland, Panama, Honduras, Bahrain, Egypt, Jordan, Kuwait, Saudi Arabia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>losing importance w.r.t. EMS</td>
<td>Kiribati, Pakistan, Costa Rica, Malta</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 4.5: NZ-USA: Beef

Figure 4.6: NZ-Saudi Arabia: Dairy Products

Figure 4.7: NZ-Morocco: Dairy Products
Fruits (basically kiwi fruit and apples), hides and skins (wool) and textile products can be considered as the second most important export commodities for NZ. Although the trade partners in these goods are not spread widely, NZ’s overall EMS’s in these markets seem to be gaining importance after 1984. From Tables 4.4 and 4.5 it may be observed that Australia and partially the European Union are the major markets for NZ’s exports of hides and textiles. The US market loses its significance in hides and textiles after 1984. The EMS’s in some of the Other Asia markets have been increasing after 1984. The EMS’s in hides and skins have been also growing in some of the Middle East countries. Australia and Pacific Island Nations are the major export markets for NZ’s fruit exports, Table 4.3. Although the average EMS’s are still between 1-5 per cent, Other Asian markets have been also gaining significance for NZ’s fruit exports after 1984. In Figures 4.11-22 NZ’s EMS trends in major markets of fruits, hides and textile products are presented, (for the remaining markets see Appendices H, K and N).
<table>
<thead>
<tr>
<th>Markets with Large EMS: (5% &lt; EMS)</th>
<th>1966-96</th>
<th>from 1966-84 to 1985-96</th>
<th>Increasing Trend for 1985-96</th>
</tr>
</thead>
<tbody>
<tr>
<td>-major markets for whole period</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Australia, Fiji, Kiribati, Papua N.Guinea</td>
<td></td>
<td>Australia</td>
<td></td>
</tr>
<tr>
<td>-markets gaining importance w.r.t. EMS</td>
<td></td>
<td></td>
<td>Mauritius</td>
</tr>
<tr>
<td>-markets losing importance w.r.t. EMS</td>
<td></td>
<td></td>
<td>Vanuatu</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Markets with Medium EMS: (1% &lt; EMS &lt; 5%)</th>
<th>1966-96</th>
<th>from 1966-84 to 1985-96</th>
<th>Increasing Trend for 1985-96</th>
</tr>
</thead>
<tbody>
<tr>
<td>-major markets for whole period</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Japan, Indonesia, South Africa, Philippines</td>
<td></td>
<td></td>
<td>Korea, Malaysia, Singapore, Argentina, UK</td>
</tr>
<tr>
<td>-markets gaining importance w.r.t. EMS</td>
<td></td>
<td></td>
<td>Korea, Malaysia, Singapore, Argentina, UK</td>
</tr>
<tr>
<td>-markets losing importance w.r.t. EMS</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Figure 4.11:** NZ-Fiji: Fruit

**Figure 4.12:** NZ-Malaysia: Fruit

**Figure 4.13:** NZ-Singapore: Fruit

**Figure 4.14:** NZ-Australia: Fruit
Markets with Large EMS:
(5% < EMS) - major markets for whole period

- Australia, Belgium, France
- Turkey, India, Israel, Korea Rep., Pakistan, Uruguay, UK
- USA, Malaysia, Netherlands

Table 4.4
EMS Analysis for Hides & Skins

<table>
<thead>
<tr>
<th>Markets with Large EMS: (5% &lt; EMS)</th>
<th>1966-96</th>
<th>from 1966-84 to 1985-96</th>
<th>Increasing Trend for 1985-96</th>
</tr>
</thead>
<tbody>
<tr>
<td>-major markets for whole period</td>
<td></td>
<td></td>
<td>Belgium</td>
</tr>
<tr>
<td>-markets gaining importance w.r.t. EMS</td>
<td></td>
<td></td>
<td>Turkey, Korea Rep., Israel</td>
</tr>
<tr>
<td>-markets losing importance w.r.t. EMS</td>
<td></td>
<td></td>
<td>USA, Netherlands</td>
</tr>
</tbody>
</table>

Figure 4.15: NZ-Japan: Fruit

Figure 4.16: NZ-Belgium: Hides & Skins

Figure 4.17: NZ-Netherlands: Hides & Skins
Figure 4.18: NZ-Korea Rep.: Hides & Skins

Figure 4.19: NZ-USA: Hides & Skins

Table 4.5
EMS Analysis for Textiles

<table>
<thead>
<tr>
<th>Markets with Large EMS: (5% &lt; EMS)</th>
<th>1966-96</th>
<th>from 1966-84 to 1985-96</th>
<th>Increasing Trend for 1985-96</th>
</tr>
</thead>
<tbody>
<tr>
<td>-major markets for whole period</td>
<td>Australia, UK, Netherlands, Greece</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-markets gaining importance w.r.t. EMS</td>
<td>Fiji, China, India, Mauritius, Pakistan, Belgium</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-markets losing importance w.r.t. EMS</td>
<td>USA., Ireland</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 4.20: NZ-Greece: Textiles

Figure 4.21: NZ-India: Textiles
The general increasing trend of EMS’s in NZ’s main export commodities after 1984 can be observed in exports of wood, pulp and paper products, mineral fuels and non-ferrous metals (aluminium). Considering the number of importing countries and relative size of EMS’s, these commodities are significant only in a very few number of markets. While the traditional trade partner, Australia, is the major market for exports of all these goods, Fiji is another major market for wood products, mineral fuels and non-ferrous metals and Malaysia and Philippines are important for pulp and paper product exports for NZ. Also, Other Asian countries have been gaining significance in other products compared to the first sub-period. NZ’s EMS trends in major markets of these goods are shown in Tables 4.6 to 4.9 and in Figures 4.23 to 4.32, (for the remaining markets see Appendices L, M, O and Q).
### Table 4.6

**EMS Analysis for Wood**

<table>
<thead>
<tr>
<th>Markets with Large EMS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(5% &lt; EMS)</td>
</tr>
<tr>
<td>-major markets for whole period</td>
</tr>
<tr>
<td>-markets losing importance w.r.t. EMS</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Markets with Medium EMS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1% &lt; EMS &lt; 5%)</td>
</tr>
<tr>
<td>-major markets for whole period</td>
</tr>
<tr>
<td>-markets gaining importance w.r.t. EMS</td>
</tr>
<tr>
<td>-markets losing importance w.r.t. EMS</td>
</tr>
</tbody>
</table>

---

**Figure 4.23:**

NZ-Korea Rep.: Wood

**Figure 4.24:**

NZ-Australia: Wood
Table 4.7
EMS Analysis for Pulp

<table>
<thead>
<tr>
<th>Markets with Large EMS: (5% &lt; EMS)</th>
<th>1966-96</th>
<th>from 1966-84 to 1985-96</th>
<th>Increasing Trend for 1985-96</th>
</tr>
</thead>
<tbody>
<tr>
<td>-major markets for whole period</td>
<td>Australia, Malaysia, Philippines</td>
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<td></td>
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<tr>
<td>-markets gaining importance w.r.t. EMS</td>
<td>Indonesia</td>
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<td>Indonesia</td>
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<table>
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<th>Markets with Medium EMS: (1% &lt; EMS &lt; 5%)</th>
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<th>Increasing Trend for 1985-96</th>
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<td>China, Hong Kong, India</td>
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Figure 4.25: NZ-Indonesia: Pulp

Figure 4.26: NZ-Malaysia: Pulp

Figure 4.27: NZ-Australia: Pulp

Figure 4.28: NZ-Japan: Pulp
Table 4.8
EMS Analysis for Mineral Fuels

<table>
<thead>
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<th>Markets for Large EMS: (5% &lt; EMS)</th>
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<th>Increasing Trend for 1985-96</th>
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<tr>
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<tr>
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<td>Australia, Fiji</td>
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<td>- markets losing Importance w.r.t. EMS</td>
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Table 4.9
EMS Analysis for Non-Ferrous Metals

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<th>Increasing Trend for 1985-96</th>
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<td>Fiji, Papua N.Guinea</td>
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<tr>
<td>- markets losing Importance w.r.t. EMS</td>
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Markets for Medium EMS: (1% < EMS < 5%)

<table>
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<th>1966-96</th>
<th>from 1966-84 to 1985-96</th>
<th>Increasing Trend for 1985-96</th>
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<td></td>
<td></td>
<td>Hong Kong, Bahrain, Singapore</td>
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</table>
The less important export products in natural resource based group are oils and beverages. Export markets of NZ in these commodities are not widespread and for beverages the significant markets with respect to relative EMS size are Australia and Fiji, Table 4.11, Figures 4.36 and 4.37. For oils and fat exports, NZ seems to gain significance in Australian and Chinese markets, however it seems to lose importance in Other Asian countries, Table 4.10, Figures 4.33-35, (for the remaining markets see Appendices P and I).

### Table 4.10
**EMS Analysis for Oils & Fat**

<table>
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<tr>
<th>Markets with Medium EMS: (1% &lt; EMS &lt; 5%)</th>
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<th>Increasing Trend for 1985-96</th>
</tr>
</thead>
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<td>Japan, Mauritius, South Africa, Fiji</td>
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<td>Australia, China</td>
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<td>-markets losing importance w.r.t. EMS</td>
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### Table 4.11
EMS Analysis for Beverages

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<td>Papua N.Guinea, Fiji</td>
<td>Fiji</td>
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<td>-markets losing importance w.r.t. EMS</td>
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### Figure 4.36
NZ-Fiji: Beverages

### Figure 4.37:
NZ-Australia: Beverages
4.2 EMS in Industrial Products

NZ’s exports of industrial based products are spread very narrowly during the whole period, Table 4.12 to 4.15. The main trade partners for these products are Australia and Pacific Island Nations particularly Fiji. While NZ has a medium sized EMS in Australian chemical, basic and miscellaneous manufacture and machinery markets, the EMS trends have been increasing for the overall period, Figures 4.39, 4.41 and 4.44. NZ has a large EMS size in Fiji markets for these goods but the trends have been volatile, Figures 4.38, 4.40, 4.42 and 4.43. Although not as significant as with other countries, NZ has also medium sized EMS in Japanese basic manufacture imports and in Kenya’s miscellaneous manufactures market, (see Appendices R, S, T and U for the remaining markets).

<table>
<thead>
<tr>
<th>Markets with Large EMS: (5% &lt; EMS)</th>
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<th>from 1966-84 to 1985-96</th>
<th>Increasing Trend for 1985-96</th>
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<td>-markets losing importance w.r.t. EMS</td>
<td>Vanuatu</td>
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Figure 4.38: NZ-Fiji: Chemicals

Figure 4.39: NZ-Australia: Chemicals
Table 4.13
EMS Analysis for Basic Manufactures

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<th>Markets with Large EMS: (5% &lt; EMS)</th>
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Figure 4.40: NZ-Fiji: Basic Manufactures

Figure 4.41: NZ-Australia: Basic Manufactures
### Table 4.14
EMS Analysis for Machines

<table>
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<th>Markets with Large EMS: (5% &lt; EMS)</th>
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<th>1966-96</th>
<th>from 1966-84 to 1985-96</th>
<th>Increasing Trend for 1985-96</th>
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Figure 4.42:
NZ-Fiji: Machines

[Graph showing NZ-Fiji: Machines]
### Table 4.15
EMS Analysis for Miscellaneous Manufactures

| Markets for Large EMS:  
(5% < EMS) | 1966-96 | from 1966-84 to 1985-96 | Increasing Trend for 1985-96 |
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<td>Fiji</td>
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<td>Kiribati</td>
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<td>-markets losing Importance w.r.t. EMS</td>
<td></td>
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<td>Vanuatu</td>
</tr>
</tbody>
</table>

| Markets for Medium EMS:  
(1% < EMS < 5%) | 1966-96 | from 1966-84 to 1985-96 | Increasing Trend for 1985-96 |
<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
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<td>-major markets for whole period</td>
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<td>-markets gaining Importance w.r.t. EMS</td>
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4.3 Concluding Remarks

In general, NZ is a small trader in most of these markets/countries and the capacity to maintain market share if a market is growing is accordingly small. This can lead to volatility in NZ's apparent competitiveness as measured by market share. NZ's EMS trends with its traditional trade partners and nine country groups can be summarised as follows.

Generally, exports of NZ have a large share and an extensive product coverage particularly in imports of the countries included in Pacific Island Nations, Other Asia and Other OECD groups. EMS's in the Australian import markets have been increasing except in beef and hides. The increase of EMS's in beverages, mineral fuels and oils & fats are particularly evident after mid 1980s but for the whole period for the remaining products. The EMS trends for beef and hides are volatile. NZ market shares in Japanese markets have had mixed trends. Beverages, crude materials, hides, fats and machinery and equipment show consistent upward trends. Beef and dairy products have trended downwards. The EMS trends in the remaining products have
been more volatile with a tendency for EMS's to decline from the mid-1980's. Chemicals and wood are two exceptions to this latter point with recent upward trends in EMS. Market shares of NZ exports in UK markets have been either very volatile or declining over the whole period. The exceptions have been for fruit, beverages and machines where the EMS's are increasing slightly. Declining trends occured for total food including beef and dairy, total crude materials including textiles, oils & fat, and chemicals. For the remaining commodities there has been an irregular export pattern between NZ and UK. In US import markets, there has been a sustained growth in EMS's in beef, fruits, beverages, total basic manufactures including non-ferrous metals, machines, wood, pulp and mineral fuel markets particularly after the mid 1980's. The trend is declining in the total crude materials including textiles and hides & skins and the chemicals market. There has been little change in the EMS for total food (including dairy), oils & fat and miscellaneous manufactures.

The EMS's in Pacific Island Nations are rising for the whole period except in hides & skins in which NZ has little trade. During the period, EMS's in this group are increasing for total food including dairy, fruits, total crude materials including wood, pulp, textile and oil markets. The EMS trends are erratic in beef, hides and non-ferrous metal markets. There has been insignificant EMS change over the whole period in beverages, mineral fuels, chemicals, total basic manufactures, machines and miscellaneous manufactures.

Apart from UK, the general EMS trends of NZ in the overall EU group have been declining in dairy, total crude materials including hides, textile and oil markets. The EMS's are increasing in total food (including fruits and vegetables) especially by early 1980s. The EU is not a major export market in rest of the product groups; beef, beverages, wood, pulp, mineral fuels, chemicals, basic manufactures and miscellaneous manufactures.

NZ's exports to overall Middle East countries accelerated during early 1980s mainly in total food. Generally, the EMS trend has been erratic for total food but it has been increasing in dairy markets and decreasing in beef markets. During the period, NZ also exported fruit, hides and textiles occasionally to the Middle East countries. For the other products EMS's have been insignificant in total imports of other countries.

In Latin American markets, EMS's start to rise by the mid-1980s in dairy, fruits and total crude materials. The EMS trend is volatile in food markets but it is very low in other commodity markets. The other country groups where NZ has low trade volumes and small market shares are EFTA, Other Europe and Africa. In the EFTA country group, the only significant and decreasing trend is seen in textiles. In other product markets, EMS's are either volatile (hides and skins) or at low levels (total food). For the whole period, NZ has no exports or very low exports (total food including beef, dairy and fruits) to the countries in Other Europe group. Lastly, the EMS trends in African markets are volatile except for textiles and oils and fats. The EMS's in these two markets have been declining.
References


Annex 1

Commodity Classification for Exports

SITC

0  Food and Live Animals (including 0111, 0112, 02, 05)
   0111  Beef fresh, frozen
   0112  Sheepmeat etc. fresh, chilled, frozen
   02   Dairy Products and Eggs
   05   Fruit and Vegetables

1  Beverages and Tobacco

2  Crude Materials, excluding fuels (including 21, 24, 25, 26)
   21  Hides, Skins, Furs undressed
   24  Wood, Lumber, Cork
   25  Pulp and Waste Paper
   26  Textile Fibres

3  Mineral Fuels etc.

4  Animal, Vegetable Oil, Fats

5  Chemicals

6  Basic Manufactures (including 68)
   68  Non Ferrous Metals

7  Machines, Transport Equipment

8  Miscellaneous Manufacturing Goods
Annex 1 (contd.):

Country Composition of World Regions

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<th>Latin America</th>
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Annex 2

Criteria for Inclusion of Data

The data period (1966-96) is thought to contain two main sub-periods; pre-reform (1966-84) and post-reform (1985-96). In deciding on the rules for the inclusion of countries, we have tried to ensure that there is sufficient data both to show a trend over the sub-periods and to carry out future research on the trade effects of economic reform in New Zealand. With this aim in mind (and in order not to lose any information), it was decided to include the countries which have the data in at least half of the number of years in either of the sub-periods (single or contiguous years) and also which have the three years data centered around the years 1967, 84, 96. Accordingly included countries must have data which falls in one of the criteria below:

- complete series (1966-96),
- data contiguous for at least six single years (1984-96),
- data existing for at least six single years (1984-96),
- data contiguous for at least nine years (1966-84),
- data existing for at least nine single years (1966-84),
- data gathered around all the years of 67, 84, 95 at least for three years.

In addition to these, when exports of NZ in a commodity to a country is greater than total imports of that country in that commodity, the country is excluded from the study because there are obviously major data errors.

NZ’s EMS data in Australian and Fiji markets have been scaled to 100 per cent in certain years in which the EMS exceeds 100 per cent by a very small amount. It is assumed that the export data are correct and that the import data are of lower quality.
APPENDIX-A

Exports of NZ (real, in 1996 prices)

Exports of NZ-Total Food (0)

Exports of NZ-Beef (0111)

Exports of NZ-Seafood (0112)

Exports of NZ-Beverages (1)

Exports of NZ-Total Crude Materials (2)

Exports of NZ-Hides & Skins (21)

Exports of NZ-Pulp (25)

Exports of NZ-Textile (26)
Exports of NZ (real, in 1996 prices)
Exports of NZ (real, in 1996 prices)
Exports of NZ (real, in 1996 prices)

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Other Europe
Exports of NZ (real, in 1996 prices)

Other Europe

Exports of NZ-Poland

Middle East

Exports of NZ-Bahrain

Exports of NZ-Cyprus

Exports of NZ-Egypt

Exports of NZ-Irak

Exports of NZ-Jordan

Exports of NZ-Kuwait

Exports of NZ-Malta
Exports of NZ (real, in 1996 prices)
Exports of NZ (real, in 1996 prices)
Exports of NZ (real, in 1996 prices)

Latvia

Exports of NZ-Uruguay

Exports of NZ-Venezuela

Other OECD

Exports of NZ-Canada

Exports of NZ-Turkey

44
Imports of NZ (real, in 1996 prices)
APPENDIX-D

Imports of NZ (real, in 1996 prices)

EC

Imports of NZ-Finland

Imports of NZ-Germany

Imports of NZ-Italy

Imports of NZ-Netherlands

EFTA

Imports of NZ-Sweden

Imports of NZ-Switzerland

Middle East

Imports of NZ-Saudi Arabia

Other Asia

Imports of NZ-China

47
Imports of NZ (real, in 1996 prices)

Other Asia

- Imports of NZ-Hong Kong
- Imports of NZ-Korea Rep.
- Imports of NZ-Singapore
- Imports of NZ-Thailand

- Imports of NZ-Indonesia
- Imports of NZ-Malaysia
- Imports of NZ-Taiwan
- Imports of NZ-Canada

Other OECD
Market Share Analysis - Total Food (0)
New Zealand Exports in Countries' Imports

Africa

NZ-India

NZ-Seychelles

NZ-South Africa

Pacific Nation Islands

NZ-Tunisia

NZ-Druze Darum

NZ-Fiji

NZ-Kiribati

NZ-Papua N.Guine

NZ-Vanuatu
APPENDIX-F

Market Share Analysis-Beef (0111)
New Zealand Exports in Countries' Imports
APPENDIX-G

Market Share Analysis - Dairy (02)

New Zealand Exports in Countries' Imports

EC

NZ-Belgium

NZ-Denmark

NZ-France

NZ-Germany

NZ-Greece

NZ-Italy

NZ-Netherlands

NZ-Portugal
Market Share Analysis-Fruit (03)
New Zealand Exports in Countries' Imports

EC

NZ-Italy

NZ-Netherlands

NZ-Portugal

NZ-Sweden

NZ-Switzerland

NZ-UK

EFTA

NZ-Norway

NZ-Switzerland
Market Share Analysis-Fruit (05)
New Zealand Exports in Countries' Imports

Middle East

NZ-Bahrain

NZ-Cyprus

NZ-Israel

NZ-Jordan

NZ-Kuwait

NZ-Oman

NZ-Qatar

NZ-Saudi Arabia
Market Share Analysis: Fruit (05)
New Zealand Exports in Countries' Imports
Market Share Analysis-Fruit (05)
New Zealand Exports in Countries' Imports

Latin America

NZ-Venezuela

Other OECD

NZ-Canada

NZ-USA
APPENDIX I

Market Share Analysis - Beverages (1)
New Zealand Exports in Countries' Total Imports
Market Share Analysis-Beverages (1)
New Zealand Exports in Countries' Total Imports

NZ-Spain

NZ-Sweden

NZ-UK

NZ-Norway

NZ-Switzerland

NZ-Bahrain

Middle East

Pacific Island Nations

NZ-Kuwait

NZ-Papua N.Guine
Market Share Analysis - Beverages (1)
New Zealand Exports in Countries' Total Imports

Pacific Island Nations

NZ-Vanuatu

Other Asia

NZ-China

NZ-Hong Kong

NZ-India

NZ-Indonesia

NZ-Korea

NZ-Malaysia

NZ-Philippines
Market Share Analysis-Crude Materials (2)
New Zealand Exports in Countries' Total Imports
Market Share Analysis: Crude Materials (2)
New Zealand Exports in Countries' Total Imports

EC

NZ-Italy

NZ-Netherlands

NZ-Portugal

NZ-Spain

NZ-Sweden

NZ-UK

EFTA

NZ-Norway

NZ-Switzerland
Market Share Analysis—Crude Materials (2)
New Zealand Exports in Countries' Total Imports

Other Europe

NZ-Hungary

NZ-Iceland

Middle East

NZ-Poland

NZ-Bahrain

NZ-Egypt

NZ-Israel

NZ-Kuwait

NZ-Malta
Market Share Analysis - Crude Materials (2)
New Zealand Exports in Countries' Total Imports

Africa

NZ-Zambezia

NZ-PRI

NZ-Papua NEW Guinea

NZ-China

Pacific Island Nations

NZ-Banua Dam

NZ-Kiribati

NZ-Vanuatu

NZ-Nonga Kena

Other Asia

NZ-China

NZ-Nonga Kena

NZ-Chinese
Other OECD

New Zealand Exports in Countries' Total Imports

Graph showing fluctuations in New Zealand exports to the USA from 1990 to 1999.
APPENDIX K

Market Share Analysis-Hides Skins (21) New Zealand Exports in Countries' Total Imports

NZ-Austria

NZ-Denmark

NZ-Finland

NZ-France

NZ-Germany

NZ-Greece

NZ-Ireland

NZ-Italy

92
Market Share Analysis—Hides Skins (21)
New Zealand Exports in Countries' Total Imports

Middle East

NZ-Malta

Other Asia

NZ-China

NZ-Hong Kong

NZ-India

NZ-Malaysia

NZ-Pakistan

NZ-Thailand

NZ-Mexico

Latin America
Market Share Analysis - Hides Skins (21)
New Zealand Exports in Countries' Total Imports

Latin America

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NZ-Uruguay

NZ-Australia

NZ-Canada

NZ-Japan

NZ-Turkey
Market Share Analysis-Wood (24)
New Zealand Exports in Countries' Total Imports

EC

NZ-UK

NZ-norway

Pacific Island Nations

NZ-Fij

NZ-China

NZ-Hong Kong

NZ-India

NZ-Malaysia

NZ-Philippines
Market Share Analysis - Wood (24)
New Zealand Exports in Countries' Total Imports

Other Asia

NZ-Singapore

0.90
0.80
0.70
0.60
0.50
0.40
0.30
0.20
0.10
0.00

NZ-Thailand

0.60
0.50
0.40
0.30
0.20
0.10
0.00

Other OECD

NZ-Canada

0.10
0.09
0.08
0.07
0.06
0.05
0.04
0.03
0.02
0.01
0.00

NZ-Japan

3.00
2.50
2.00
1.50
1.00
0.50
0.00

NZ-USA

1.20
1.00
0.80
0.60
0.40
0.20
0.00
Market Share Analysis—Textiles (26)
New Zealand Exports in Countries' Total Imports

Other Europe

NZ—Iceland

NZ—Poland

NZ—Egypt

NZ—Israel

NZ—Algeria

NZ—Morocco

NZ—South Africa

NZ—Tunisia
Market Share Analysis - Textiles (26)
New Zealand Exports in Countries' Total Imports

Pacific Island Nations

Other Asia

NZ-Chile

NZ-Hong Kong

NZ-Indonesia

NZ-Korea Rep.

NZ-Malaysia

NZ-Mauritius
Market Share Analysis - Textiles (26)
New Zealand Exports in Countries' Total Imports

Other Asia

NZ-Pakistan

NZ-Philippines

Latin America

NZ-Singapore

NZ-Thailand

Other OECD

NZ-Mexico

NZ-Canada

NZ-Japan

NZ-Turkey
New Zealand Exports in Countries' Total Imports

Other OECD
### Market Share Analysis - Oils

**New Zealand Exports in Countries' Total Imports**

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Market Share Analysis-Oils Fat (4)
New Zealand Exports in Countries' Total Imports

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APPENDIX-Q

Market Share Analysis—Non-Ferrous Metals (as)
New Zealand Exports in Countries’ Total Imports

NZ-Belgium

NZ-Denmark

NZ-France

NZ-Germany

NZ-Italy

NZ-Netherlands

NZ-Spain

NZ-Sweden
### Market Share Analysis: Non-Ferrous Metals (68) 
**New Zealand Exports in Countries' Total Imports**

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| NZ-Fiji | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| NZ-Singapore | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| NZ-Thailand | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| NZ-Malaysia | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

115
Market Share Analysis-Chemicals (5)
New Zealand Exports in Countries' Total Imports

Other Europe

NZ-Hungary

NZ-Iceland

Middle East

NZ-Poland

NZ-Bahrain

NZ-Cyprus

NZ-Egypt

NZ-Isreal

NZ-Jordan

120
Market Share Analysis-Chemicals (5)
New Zealand Exports in Countries' Total Imports

Pacific Island Nations

Other Asia

NZ-Papua N.Golne

NZ-Vanuatu

NZ-China

NZ-Hong Kong

NZ-India

NZ-Indonesia

NZ-Korea Rep.

NZ-Malaysia

122
Market Share Analysis - Chemicals (5)
New Zealand Exports in Countries' Total Imports

NZ-Brazil

NZ-Chile

NZ-Colombia

NZ-Guatemala

NZ-Jamaica

NZ-Mexico

NZ-Panama

NZ-Peru
Market Share Analysis-Chemicals
New Zealand Exports in Countries' Total Imports

Latin America

NZ-Uruguay

NZ-Venezuela

Other OECD

NZ-Canada

NZ-Japan

NZ-Turkey

NZ-USA
Market Share Analysis-Basic Manufactures (6)
New Zealand Exports in Countries' Total Imports

- NZ-Austria
- NZ-Belgium
- NZ-Denmark
- NZ-Finland
- NZ-France
- NZ-Germany
- NZ-Greece
- NZ-Ireland
Other Europe

NZ-Hungary

NZ-Iceland

Middle East

NZ-Poland

NZ-Bahrain

NZ-Cyprus

NZ-Israel

NZ-Jordan

NZ-Kuwait
Market Share Analysis - Basic Manufactures (6)
New Zealand Exports in Countries' Total Imports

Middle East

NZ-Malta

NZ-Oman

NZ-Qatar

NZ-Saudi Arabia

NZ-Kenya

NZ-Seychelles

NZ-South Africa

NZ-Singapore

Pacific Island Nations
Market Share Analysis—Basic Manufactures (6)
New Zealand Exports in Countries’ Total Imports

Other OECD

NZ-Japan

NZ-Turkey

NZ-USA


Market Share Analysis - Misc. Manufactures (8)
New Zealand Exports in Countries' Total Imports
Market Share Analysis-Misc. Manufactures (8)
New Zealand Exports in Countries' Total Imports

Pacific Island Nations

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Market Share Analysis-Misc. Manufactures (8)
New Zealand Exports in Countries’ Total Imports

Other Asia

NZ-Mauritius

NZ-Nepal

NZ-Pakistan

NZ-Philippines

NZ-Singapore

NZ-Sri Lanka

Latin America

NZ-Thailand

NZ-Argentina
APPENDIX-U

Market Share Analysis-Machines (7)
New Zealand Exports in Countries' Total Imports

EC

NZ-Austria

NZ-Belgium

NZ-Denmark

NZ-Finland

NZ-France

NZ-Germany

NZ-Greece

NZ-Ireland
Market Share Analysis - Machines (7)

New Zealand Exports in Countries' Total Imports

EC

NZ-Italy

NZ-Netherlands

NZ-Portugal

NZ-Spain

NZ-Sweden

NZ-UK

EFTA

NZ-Norway

NZ-Switzerland
Market Share Analysis-Machines (7)
New Zealand Exports in Countries' Total imports

Pacific Island Nations

NZ-Brazil Daran

NZ-Kiribati

NZ-Papua N.Guine

NZ-Vanuatu

Other Asia

NZ-China

NZ-Hong Kong

NZ-India

NZ-Indonesia
Market Share Analysis: Machines (7)
New Zealand Exports in Countries' Total Imports

Other Asia

NZ-Korea Rep.

NZ-Malaysia

NZ-Mauritius

NZ-Nepal

NZ-Pakistan

NZ-Philippines

NZ-Singapore

NZ-Sri Lanka
Market Share Analysis - Machines (7)
New Zealand Exports in Countries' Total Imports

Latin America

NZ-Ecuador

NZ-Salvador

NZ-Guadeloupe

NZ-Guatemala

NZ-Jamaica

NZ-Mexico

NZ-Panama

NZ-Peru
Market Share Analysis-Machines (7)
New Zealand Exports in Countries' Total Imports
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