

The Hawke's Bay economy – historical performance and trends

for Hawke's Bay Regional Economic
Development Agency

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Authorship

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Executive summary

This report provides a description of the Hawke's Bay's economy including its economic performance, productivity, population, wellbeing outcomes and the Māori and Pacific Peoples economies. It is desktop based and is a scene setter for the subsequent consultation phase of the project in which challenges and opportunities for the region will be identified.

Global trends influencing Hawke's Bay

Globally, the last five years has seen significant upheaval across the economy. Economic trends were severely disrupted in 2020 as the COVID-19 pandemic swept the world, leading to lockdowns and economic and social restrictions globally. Supply chains became heavily impacted by disrupted supply of goods, leading to higher shipping rates and uncertain freight movements. Global restrictions on travel and movement saw spending shift away from services and towards goods, stimulating demand for high-quality food exports globally that Hawke's Bay was able to supply.

Monetary stimulus saw interest rates cut globally to spur spending and investment, sending demand for goods and services soaring as restrictions eased. Sustained high levels of monetary and fiscal stimulus kept demand for goods, including Hawke's Bay exports, high for a period, with larger volumes and much higher prices. However, with demand outstripping supply globally, inflation rose to rates not seen in a generation, which was met with sharply tighter monetary policy. Rising interest rates then curbed demand globally, seeing demand for exports diminished, and households and businesses around the world limited spending and investment.

National trends influencing Hawke's Bay

Nationally, economic trends mirrored many global economic trends, but often with a lag. Periods of lockdown and movement restrictions forced a higher rate of working from home as offices were temporarily shuttered, with the national working from home rate at 42% during times of restriction. These periods of restriction also forced households to consider their operating environment, and with a clear uplift in the ability to work from home, a shift from metro areas towards provincial centres, including Hawke's Bay, was observed. Households saw provincial areas as having lower costs of living, lower house prices, and strong social and lifestyle benefits, with these shifts enabled by a more flexible approach to working.

Strong export demand helped support stronger economic outcomes in provincial areas of New Zealand like Hawke's Bay that had a focus on food production, as well as areas that didn't have as much exposure to international tourism. An inability to travel internationally saw household travel spending repurposed into domestic travel, with Kiwis exploring more of New Zealand as the borders remained closed. More recent times have seen inflation hit harder, and lower export demand coupled with high domestic interest rates have curbed local economic activity.

Hawke's Bay population

Population growth in the Hawke's Bay averaged 1.4% over the five years to 2023, compared with 1.3% nationally. Hawke's Bay's population growth exceeded national population growth in three out of the last five years. Factors contributing to its recent

strong performance include strong net international migration, plentiful job opportunities, remote working options, an attractive lifestyle, and affordable housing.

Population growth was strongest in Central Hawke's Bay District (1.4%) and Hastings District (1.3%) over the 5 years to 2023. Napier City, with less space for expansion, had the slowest growth (0.7%pa).

In 2023, 29% of the Hawke's Bay population identified as Māori, which is 11 percentage points higher than the national proportion of 18%. Among the four territorial authorities making up the Hawke's Bay, Wairoa has by far the highest proportion of Māori (69%).

Hawke's Bay's population has both a higher proportion of under 15-year-olds and 65-year-olds and older than the national population. Only 61% of Hawke's Bay's population was of working age (15 to 64-years of age) in 2023 which was four percentage points lower than the national population (65% age).

Hawke's Bay economy

Growth in real gross domestic product (GDP) in Hawke's Bay averaged 3.1% over the five years to 2023, compared with 2.5% in the national economy. Growth in Hawke's Bay exceeded growth in the national economy in four out of the last five years. Prior to 2018 the region underperformed the national economy each year since 2006.

Napier City and Hastings City dominate the Hawke's Bay economy, collectively contributing nearly 90% of the region's economic output in 2023. They have led growth in the region, contributing 94% of the region's growth between 2018 and 2023.

Despite the Hawke's Bay's large agricultural economic base, high value services have been the largest contributors to the region's economic expansion over the five years to 2023. The largest contributor to growth was professional, scientific and technical services which grew 5.8%pa, more than double the rate of growth of the regional economy (2.6%pa).

Hawke's Bays' economy has a strong export orientation. Exports from Hawke's Bay amounted to 31% of the region's GDP in 2023, almost a third larger than the national proportion (22%). Apples, pears and other fruit account for the largest proportion of exports from the Hawke's Bay.

In 2023 Hawke's Bay's GDP per capita (\$55,848 in 2023 prices) was only slightly more than three-quarters of the national level (\$72,329). Contributors to the lower GDP per capita include its smaller proportion of its population that are of working age, lower labour force participation rate and its lower productivity rate.

Hawke's Bay's five largest industries have significantly lower productivity than in the national economy. The most extreme is agriculture, forestry and fishing, Hawke's Bays' second largest industry, which contributes 9.1% of the region's GDP in 2023 and had a productivity level of just 68% of the national productivity level. This may be influenced by the types of agriculture in the region.

The region's lower productivity results in lower average earnings (income earned through employment) and household incomes. Average earnings per filled job in Hawke's Bay was approximately 10% lower than in New Zealand and average household income about 9% below the national level.

Hawke's Bay labour market

Over the five years to 2023 employment growth in Hawke's Bay averaged 2.2%pa, slightly higher than the national average of 2.0%. This is a change in fortunes for the region after lagging the national average for most of the period from 2005 to 2016.

The construction industry was the largest contributor to employment growth in Hawke's Bay over the past five year, adding more than 2,000 jobs over the period.

Historically, Hawke's Bay's unemployment rate has been above the national average but has been closing the gap and by March 2024 the rate was sitting at 3.6%, below the national average of 4.0%. Wairoa has a much higher unemployment rate than the other territorial authorities in Hawke's Bay, with its rate sitting at 7.2%.

The region's NEET rate (those people aged 15 to 24 not in employment, education, or training) has also fallen sharply and was sitting at 10.7% in March 2024, compared to 12.1% nationally.

School leaver attainment in Hawke's Bay sat close to the national average in 2023, although attainment at the crucial University Entrance (UE) level was below average.

Wellbeing in Hawke's Bay

Hawke's Bay has mostly lower wellbeing outcomes than NZ. In 2023, Hawke's Bay only outperformed New Zealand in two wellbeing domains: housing and civil engagement and governance. It underperformed in safety, income and consumption, environment, social connections, jobs and earnings, health and knowledge and skills. Among the four territorial authorities Napier City had the highest outcomes.

Māori in the Hawke's Bay economy and labour market

The number of Māori employed in Hawke's Bay has risen from under 15,000 in 2013 to well above 22,000 by 2023. Over this period Māori employment has grown on average 4%pa compared with 1.4% for non-Māori.

Māori workers are overrepresented in the primary industries (in Hawke's Bay mostly agriculture, forestry and fishing) and goods producing industries both of which tend to require lower skilled workers. At a fine level of industry detail meat processing is by far the largest employer of Māori workers.

The rapid growth in employment of Māori over the last decade and more has resulted in the Māori unemployment rate in Hawke's Bay declining from a post GFC high of 17.1% in 2010 to 7.8% in 2023.

In 2021 there were 831 Māori businesses in Hawke's Bay which amounted to 4.2% of total businesses in the region. This was higher than in the national economy, in which 3.4% of businesses were Māori. Nearly half of all Māori businesses are in the agriculture and construction industries.

Average Māori earnings are lower than average across all ethnicities and gap is widening. The average earnings of Māori workers in Hawke's Bay was \$59,200 in 2023 compared with an average of \$67,100 across all ethnicities.

Pacific Peoples in the Hawke's Bay economy and labour market

The number of Pacific Peoples in employment in the Hawke's Bay grew from fewer than 2,000 in 2013 to over 5,000 in 2023. The rate of growth of nearly 10%pa considerably exceeds the rate of all ethnicities (1.9%) over the same period. By 2023 Pacific Peoples accounted for 5.6% of total employment in Hawke's Bay, up from just 2.6% in 2013.

Nearly two-thirds of Pacific Peoples workers were employed in the primary industries and (low value) other services sectors in Hawke's Bay in 2023. Apple and pear growing is by far the largest employer of Pacific Peoples.

Despite strong employment growth of Pacific Peoples in Hawke's Bay over the past decade, the unemployment rate of Pacific People was sitting at a very high rate of 9.2% in 2023, well above the average rate for all ethnicities of 3.8%.

Table 1. Summary of indicators

Indicator	Measurement	Year	Hawke's Bay Region	New Zealand	Wairoa District	Hastings District	Napier City	Central Hawke's Bay District
Population								
Total population	Persons	2023	184,800	5,223,100	9,290	91,900	67,500	16,000
Population change, 2018-2023	Average annual change		1.4%	1.3%	1.3%	1.6%	1.0%	1.8%
Māori population	Persons	2023	51,830	904,100	6,230	25,760	15,830	4,010
% Māori	% of total	2023	28.0%	17.3%	67.1%	28.0%	23.5%	25.1%
Pacific Peoples population	Persons	2023	13,650	476,210	410	9,690	2,980	570
% Pacific Peoples	% of total	2023	7.4%	9.1%	4.4%	10.5%	4.4%	3.6%
Working age population	Persons	2023	113,000	3,391,200	5,420	57,300	40,900	9,250
% Working age population	% of total	2023	61.1%	64.9%	58.3%	62.4%	60.6%	57.8%
Economy								
GDP	\$m, 2023 prices	2023	10,321	377,784	404	5,554	3,605	758
GDP change, 2018-2023	Average annual change		3.1%	2.5%	0.7%	3.3%	3.3%	2.2%
GDP per capita			\$55,848	\$72,329	\$43,445	\$60,436	\$53,412	\$47,356
Exports	\$m, current prices	2023	\$3,229	\$83,777	\$288	\$1,892	\$589	\$461
Exports as % of GDP		2023	31.3%	22.2%	71.3%	34.1%	16.3%	60.8%
Productivity	GDP per filled job	2023	113,685	137,196	113,180	111,933	117,101	111,279
Earnings	Mean annual earnings	2023	\$67,076	\$74,754	\$59,252	\$68,905	\$65,862	\$62,289
Household income	Mean annual HH income	2023	\$113,907	\$125,424	\$92,101	\$122,557	\$108,111	\$105,766
Labour market								
Employment	Filled jobs	2023	90,783	2,753,601	3,566	49,620	30,788	6,809
Employment change, 2018-2023	Average annual change		2.2%	2.0%	0.9%	2.3%	2.3%	1.7%
Unemployment rate	% of workforce unemployec	2023	3.8%	3.3%	7.8%	3.5%	3.9%	3.1%
NEET rate		2023	14.3%	11.2%	22.4%	13.9%	14.0%	12.9%
Māori								
Employment	Filled jobs	2023	22,223	392,194	1,889	12,149	6,585	1,565
Employment change, 2018-2023	Average annual change		3.8%	3.5%	1.3%	3.9%	4.6%	3.0%
Unemployment rate	% of workforce unemployec	2023	7.8%	6.8%	11.8%	7.1%	7.8%	5.9%
Earnings	Mean annual earnings	2023	\$59,203	\$67,801	\$57,225	\$60,042	\$58,778	\$58,425
Businesses	Businesses that are Māori	2021	831	20,499				
	% businesses that are Māori	2021	12.7%	11.0%				
Pacific Peoples								
Employment	Filled jobs	2023	5,070	176,121		3,613	1,097	232
Employment change, 2018-2023	Average annual change		6.7%	4.6%		6.9%	6.5%	5.6%
Unemployment rate	% of workforce unemployec	2023	9.2%	6.0%		8.9%	9.5%	6.3%
Earnings	Mean annual earnings	2023	\$59,278	\$64,899		\$59,207	\$61,172	\$61,079

Introduction

The Hawke's Bay Regional Economic Development Agency has commissioned Infometrics and MartinJenkins to investigate challenges and opportunities within key sectors of the region's economy. The investigation will include a desktop analysis and extensive consultation with stakeholders in the region.

This report is the start of the desktop analysis. It provides a scene setter for the subsequent consultation phase of the project in which challenges and opportunities for the region will be identified.

This report starts with a description of the global and national trends that impact Hawke's Bay's economy. The report then describes the salient features of the Hawke's Bay economy including its economic performance, productivity, population, and wellbeing outcomes. It also describes the Māori and Pacific economies separately.

The report focusses mostly on the Hawke's Bay economy as a whole, but where appropriate delves into some of the differences between the four territorial authorities - Wairoa District, Central Hawke's Bay District, Hastings District and Napier City.

At the beginning of the report there is a summary table, which includes most of the indicators used in the report for Hawke's Bay, New Zealand and the four territorial authorities. At the end of the report there is a *Statistical and graphical appendix* which provides more detailed charts and tables than is feasible in the main body of the report.

Global trends influencing Hawke's Bay

Globally, the last five years has seen significant upheaval across the economy. Economic trends were severely disrupted in 2020 as the COVID-19 pandemic swept the world, leading to lockdowns and economic and social restrictions globally. Supply chains became heavily impacted by disrupted supply of goods, leading to higher shipping rates and uncertain freight movements. Global restrictions on travel and movement saw spending shift away from services and towards goods, stimulating demand for high-quality food exports globally that Hawke's Bay was able to supply.

Monetary stimulus saw interest rates cut globally to spur spending and investment, sending demand for goods and services soaring as restrictions eased. Sustained high levels of monetary and fiscal stimulus kept demand for goods, including Hawke's Bay exports, high for a period, with larger volumes and much higher prices. However, with demand outstripping supply globally, inflation rose to rates not seen in a generation, which was met with sharply tighter monetary policy. Rising interest rates then curbed demand globally, seeing demand for exports diminished, and households and businesses around the world limited spending and investment.

National trends influencing Hawke's Bay

Nationally, economic trends mirrored many global economic trends, but often with a lag. Periods of lockdown and movement restrictions forced a higher rate of working from home as offices were temporarily shuttered, with the national working from home rate at 42% during times of restriction. These periods of restriction also forced households to consider their operating environment, and with a clear uplift in the ability

to work from home, a shift from metro areas towards provincial centres, including Hawke's Bay, was observed. Households saw provincial areas as having lower costs of living, lower house prices, and strong social and lifestyle benefits, with these shifts enabled by a more flexible approach to working.

Strong export demand helped support stronger economic outcomes in provincial areas of New Zealand like Hawke's Bay that had a focus on food production, as well as areas that didn't have as much exposure to international tourism. An inability to travel internationally saw household travel spending repurposed into domestic travel, with Kiwis exploring more of New Zealand as the borders remained closed. More recent times have seen inflation hit harder, and lower export demand coupled with high domestic interest rates have curbed local economic activity.

The Hawke's Bay population

This section describes the growth in the Hawke's Bay population over the past couple of decades.

Hawke's Bay's population growth has recently surpassed national growth

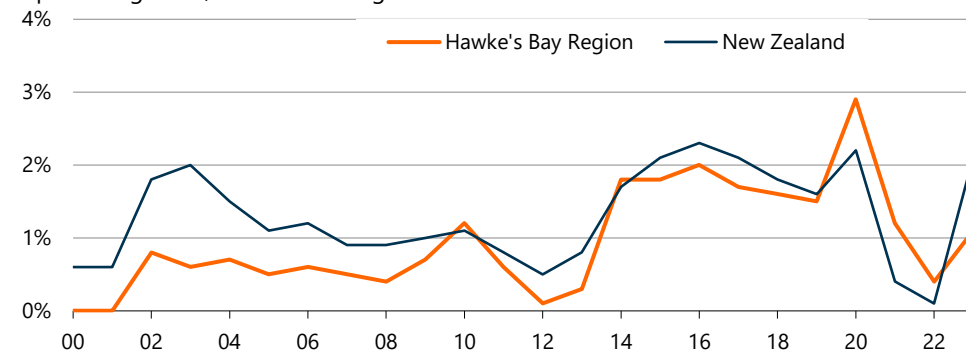
Population growth in the Hawke's Bay averaged 1.4% over the five years to 2023, compared with 1.3% nationally. Hawke's Bay's population growth exceeded national population growth in three out of the last five years.

Stronger population growth in recent years came after a long period during which Hawke's Bay's growth substantially lagged New Zealand's. Factors contributing to its recent strong performance include strong net international migration (the region gained a net 7,910 new residents through international migration flows between 2018 and 2023), plentiful job opportunities, remote working options, an attractive lifestyle, and affordable housing.

Chart 1

Hawke's Bay growth exceeded NZ in recent years

Population growth, annual % change



Central Hawke's Bay's population grows fastest

Chart 2 shows that population growth in Hawke's Bay was strongest in Central Hawke's Bay District (1.4%) and Hastings District (1.3%) over the 5 years to 2023. Napier City, with less space for expansion, had the slowest growth (0.7%pa).

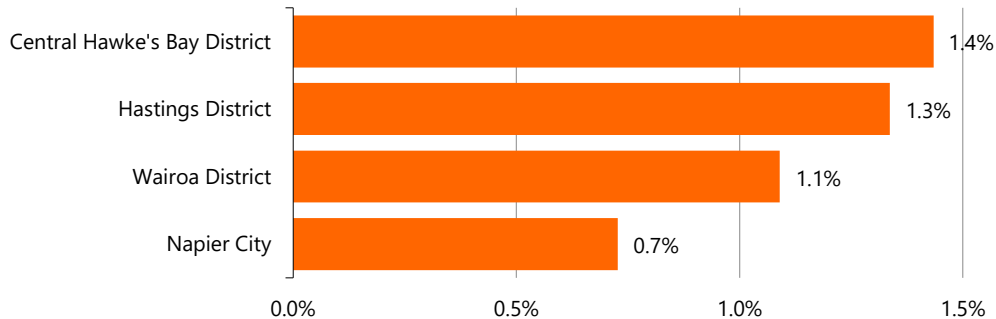
Central Hawke's Bay District and Wairoa District stand out as the districts that have turned their fortunes around. Central Hawke's experienced almost no population growth over the period 1996 to 2013 but since then has experienced average growth of 1.9%pa. Wairoa's population declined from 10,200 in 1996 to a low of 8,300 in 2013 but has since recovered to 9,290 in 2023 after 10 successive years of growth.

Both Napier City and Hastings District have mostly experienced population growth since 1996.

Chart 2

Highest five-year growth in Central Hawke's Bay

Population growth, annual average % change, 2018-2023



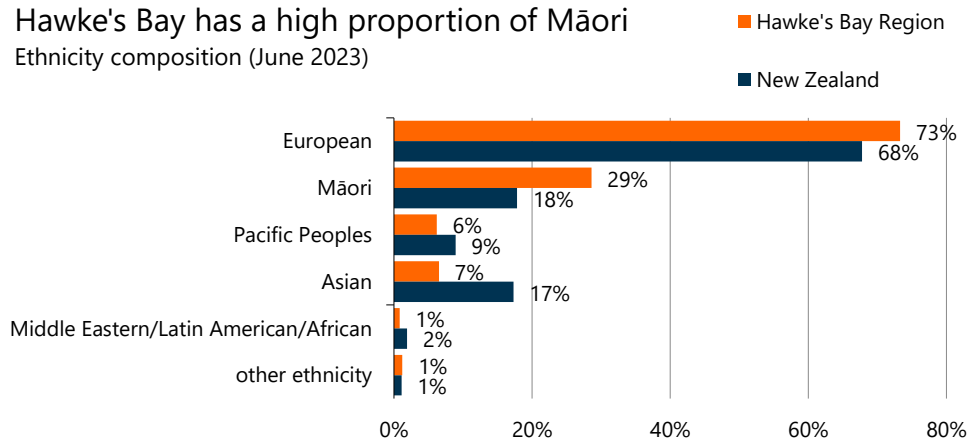
The Hawke's Bay population has a high proportion of Māori

The Hawke's Bay has deep Māori roots, and this is reflected in its large Māori population. Chart 3 shows that in 2023, 29% of the Hawke's Bay population identified as Māori, which is 11 percentage points higher than the national proportion of 18%.

Chart 3

Hawke's Bay has a high proportion of Māori

Ethnicity composition (June 2023)



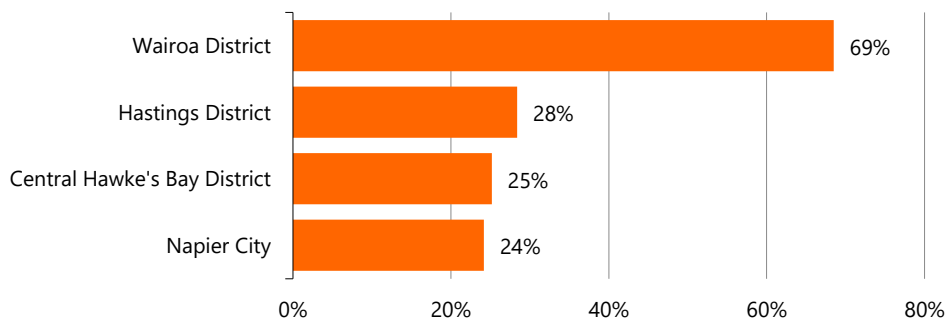
The Asian population is considerably underrepresented in Hawke's Bay. Only 6.5% of the population identified as Asian in 2023, well below the national average of 17.3%. Pacific Peoples are slightly underrepresented while Europeans are slightly overrepresented.

Wairoa has by far the highest proportion of Māori population

Chart 4 shows that among the four territorial authorities making up the Hawke's Bay, Wairoa has by far the highest proportion of Māori, with Māori making up 69% of the district's population. Māori make up between 24% and 29% of the population across the other territorial authorities.

Chart 4

Wairoa has highest proportion of Māori
Māori % of total population (June 2023)



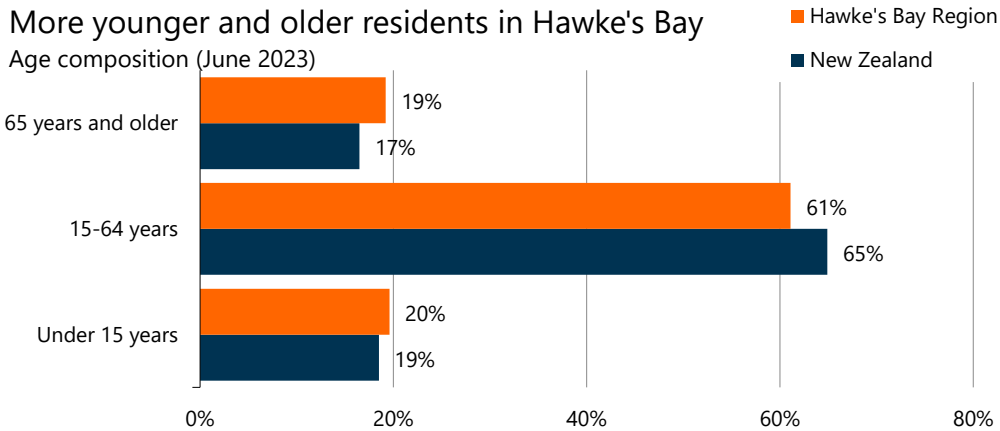
Hawke's Bay's age profile younger and older than NZ's

Chart 5 shows that Hawke's Bay's population has both a higher proportion of under 15-year-olds and 65-year-olds and older than the national population. In 2023 20% of Hawke's Bay's population were under 15 years, compared with 19% of the national population. The high proportion of young people is largely explained by the region's high fertility rate. In 2018, Hawke's Bay had the third highest fertility rate (2.12 births per woman, compared to the national average of 1.75) among New Zealand's 16 regional council areas.

Hawke's Bay region's proportion of persons 65 years and older was 19% compared with 17% in the national population. The region's fine climate and lifestyle make it an attractive option for retirees.

Only 61% of Hawke's Bay's population was of working age (15 to 64-years of age) in 2023 which was four percentage points lower than the national population (65% age). This has significant implications for the region's economy as there is a smaller proportion that economically support the younger and older generations.

Chart 5



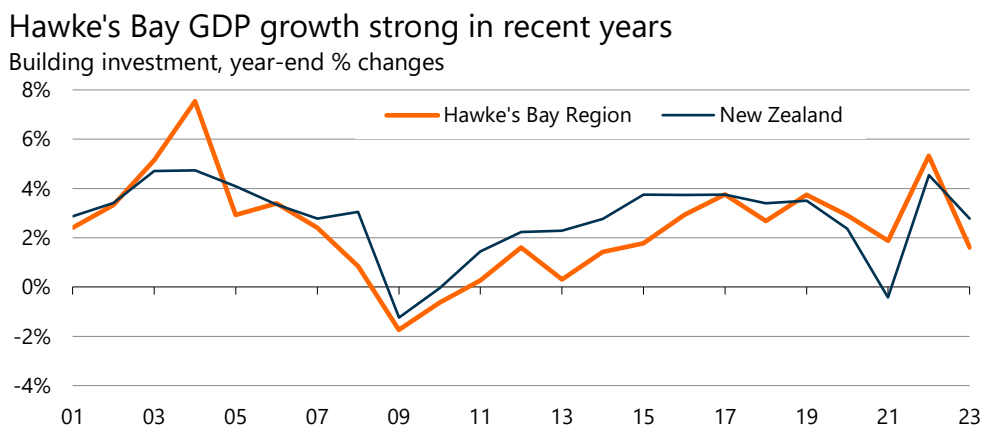
The Hawke's Bay economy

This section looks at the characteristics and recent performance of the Hawke's Bay economy.

Hawke's Bay's economy has outperformed NZ in recent years

Growth in real gross domestic product (GDP) in Hawke's Bay averaged 3.1% over the five years to 2023, compared with 2.5% in the national economy. Growth in Hawke's Bay exceeded growth in the national economy in four out of the last five years. Chart 6 shows that 2018 was a turning point for the Hawke's Bay economy. Prior to 2018 the region underperformed the national economy each year since 2006.

Chart 6



The Hawke's Bay economy performed remarkably well during the COVID pandemic, achieving growth of 1.9% during the year to March 2021, when output in the national economy declined by 0.4%. Demand for food was sustained through the pandemic and regions with large food production sectors, including Hawke's Bay, weathered the economic storm well.

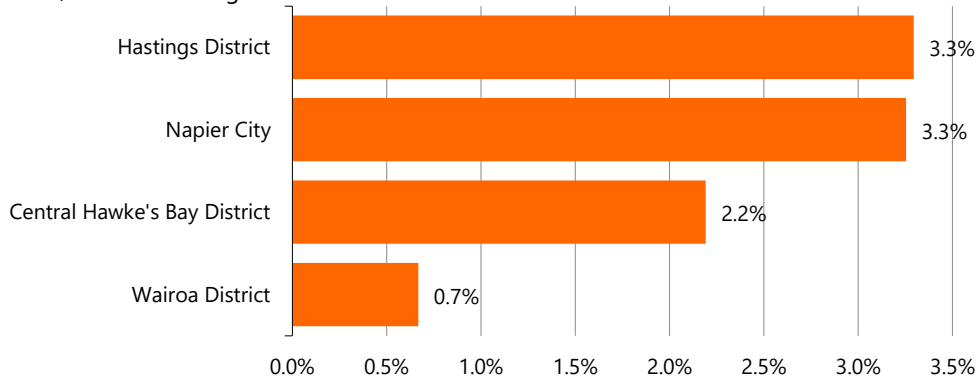
Napier and Hastings have led Hawke's Bay's growth

Napier City and Hastings City dominate the Hawke's Bay economy, collectively contributing nearly 90% of the region's economic output. Not only are they the largest economies, but they have led growth in the region, contributing 94% of the region's growth between 2018 and 2023. Chart 7 shows that both Napier City and Hastings City grew at an average of 3.3%pa between 2018 and 2023 while Central Hawke's Bay District and Wairoa District grew at a much more modest 2.2%pa and 0.7%pa respectively.

Chart 7

Hastings and Napier led growth over last five years

GDP, annual % change



Hawke's Bay economy is heavily export oriented

A significant proportion of economic output from the Hawke's Bay economy is exported. Chart 8 shows that exports from Hawke's Bay amounted to 31% of the region's GDP in 2023, almost a third larger than the national proportion (22%).

Among the four territorial authorities in the region, Wairoa (71%) and Central Hawke's Bay (61%) had the highest export proportions, reflecting the dominance of the primary sector in these areas with their high export propensity.

Chart 8

Hawke's Bay economy heavily export oriented

Total exports as % of GDP, 2023

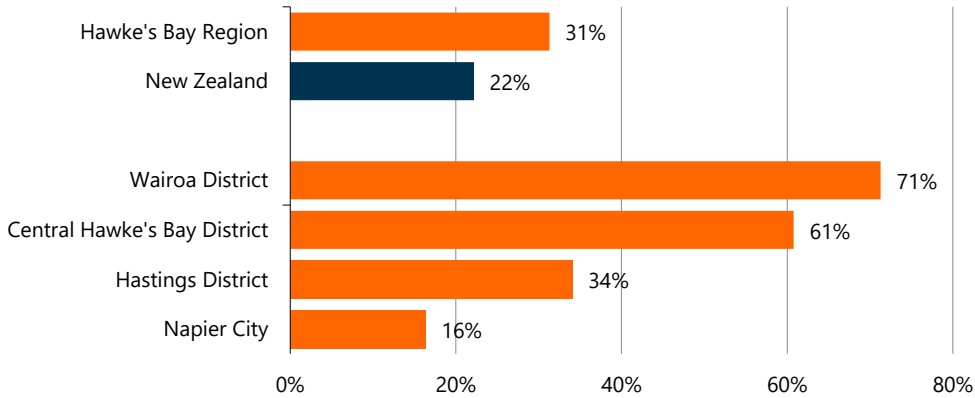
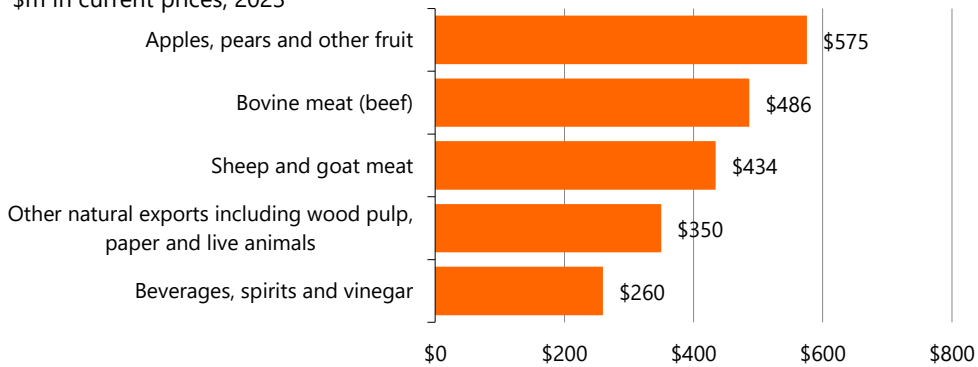


Chart 9 shows that apples, pears and other fruit account for the largest proportion of exports from the Hawke's Bay. More than \$575m were exported in 2023, accounting for 17% of total goods exports from the region. Meat categories are the next largest with beef accounting for nearly 15% and sheep and goat another 13%. A full list of goods exports is provided in Table 4 in the *Statistical and graphical appendix*.

Chart 9

Apples, pears and other fruit are largest exports

\$m in current prices, 2023



Recent economic growth driven by high value services

Despite the Hawke's Bay's large agricultural economic base, high value services have been the largest contributors to the region's economic expansion over the five years to 2023.

The economic output of professional, scientific and technical services grew 5.8%pa, more than double the rate of growth of the regional economy (2.6%pa). Output from the industry increased by \$202m, making it the largest contributor to the region's \$1,455m increase in GDP between 2018 and 2023.

Chart 10 shows that health care and social assistance was the second largest contributor to overall growth over the five-year period, expanding by 4.1%pa and adding an

additional \$174m to the region's GDP. Table 4 in the *Statistical and graphical appendix* shows the contribution of all industries to economic growth in Hawke's Bay for the period 2018-2023.

Chart 10

Professional services the largest contributor to growth

\$m increase in GDP, 2018-2023



The four territorial authorities have had different growth industries. Napier's property market has been a significant contributor to its growth, with the rental, hiring and real estate services adding \$85.2m to the City's GDP over the over the five years to 2023. Hastings' health care and social assistance industry was the largest contributor to growth over the same period, adding \$137.3m. The professional, scientific and technical services industry was the largest contributor in Central Hawke's Bay, adding \$14.8m and the construction industry in Wairoa, adding \$5.2m.

Contribution to GDP growth by ANZSIC L1 industries

ANZSIC Level 1 industries	GDP (\$m)		Absolute growth (\$m)	Annual growth
	2018	2023		
Professional, scientific and technical services	502.2	703.8	201.6	5.8%
Health care and social assistance	645.1	818.9	173.8	4.1%
Construction	591.2	712	120.8	3.1%
Retail trade	504.7	617.3	112.6	3.4%
Manufacturing	1131.8	1240.7	108.9	1.5%
Rental, hiring and real estate services	624.8	733.4	108.6	2.7%
Wholesale trade	355.5	446.1	90.6	3.9%
Public administration and safety	313.8	371.4	57.6	2.8%
Administrative and support services	183.7	239	55.3	4.5%
Information media and telecommunications	72.1	108.5	36.4	7.0%
Electricity, gas, water and waste services	192	224.8	32.8	2.7%
Accommodation and food services	192.1	224.4	32.3	2.6%
Other services	121.2	143.9	22.7	2.9%
Transport, postal and warehousing	406.4	422.2	15.8	0.6%
Financial and insurance services	220.4	236.1	15.7	1.2%
Arts and recreation services	66.7	75.9	9.2	2.2%
Mining	11.2	6.9	-4.3	-7.8%
Agriculture, forestry and fishing	945.5	935.8	-9.7	-0.2%
Education and training	348.9	336.6	-12.3	-0.6%
Total	8865.5	10320.7	1455.2	2.6%

Chart 40 in the *Statistical and graphical appendix* shows the five largest contributors to growth for each of the four territorial authorities.

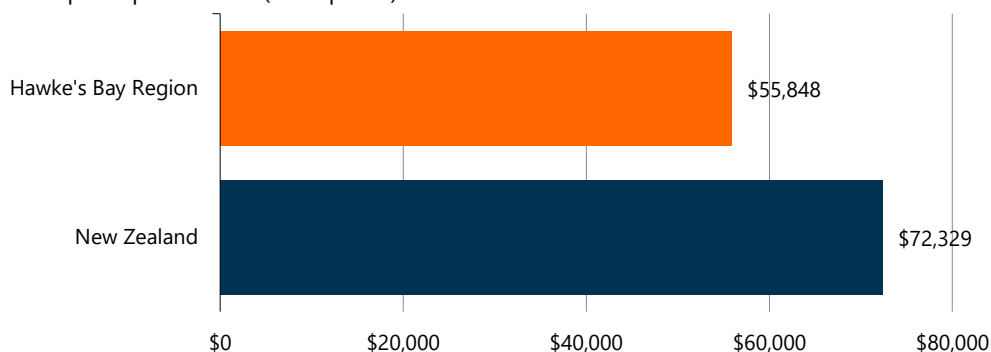
GDP per capita is lower in Hawke's Bay than in NZ

The size of an area's economy relative to the size of its population is an important determinant of an area's economy ability to support the livelihoods and wellbeing of the local population. Chart 11 shows that in 2023, Hawke's Bay's GDP per capita (\$55,848 in 2023 prices) was only slightly more than three-quarters of the national level (\$72,329).

Chart 11

GDP per capita is lower in Hawke's Bay than NZ

GDP per capita in 2023 (2023 prices)



There are multiple contributors to Hawke's Bay's lower output per capita

Hawke's Bay has a smaller proportion of working-age people

Hawke's Bay's working-age population comprises a smaller proportion of the total population as it has both a higher proportion of young people (under 15-years old) and older people aged 65 years and over. In 2023 only 61% of Hawke's Bay's population were of working age population compared to 65% in the national economy according to Stats NZ's estimated resident population.

A smaller proportion of the working-age population available to work

At 69%, the labour force participation rate in Hawke's Bay/Gisborne is somewhat lower than the 72% recorded in the national economy over the year to March 2024, according to Stats NZ's Quarterly Labour Force Survey.

Output per worker is lower in Hawke's Bay

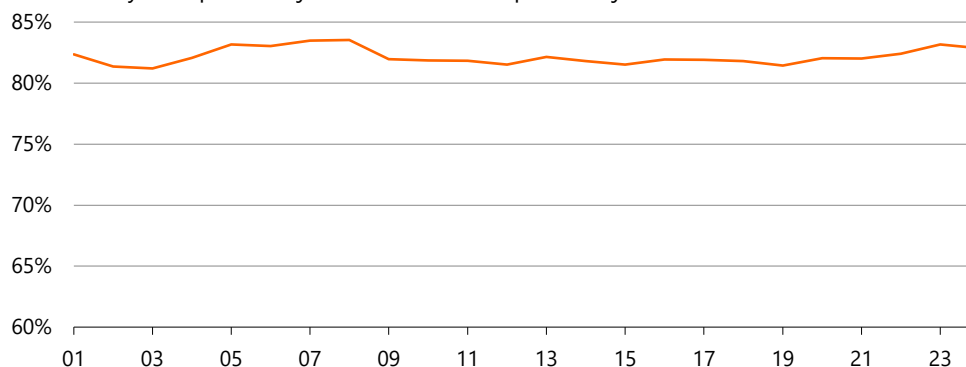
To compound the economic impact of the region's demography and labour market participation, output per filled job (a measure of productivity) is considerably lower in Hawke's Bay than in the national economy. GDP per worker in Hawke's Bay (\$113,685) was 17% lower than the equivalent measure in the national economy (\$137,196) in 2023.

Chart 12 shows that Hawke's Bay's average productivity has moved between a maximum of 84% of the national economy's in 2007 and a minimum of 81% in 2002. Since 2017, Hawke's Bay's productivity has been on a slight upward trajectory, which is in line with many of its improving economic indicators.

Chart 12

Hawke's Bay productivity consistently lower than NZ

Hawke's Bay GDP per filled job as % of NZ GDP per filled job



There are multiple reasons why a region may have a lower productivity which include the type of industries present in the local economy, skills of workers, technologies used by firms, and the physical characteristics of the region including its climate and topography.

A major contributor to a region's productivity is the mix of industries. Areas with high concentrations of highly productive industries tend to have high average productivity.

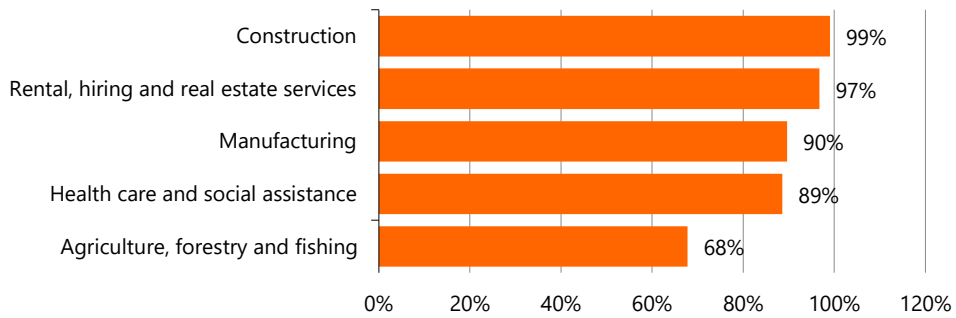
Chart 13 shows that Hawke's Bay's five largest industries have significantly lower

productivity than in the national economy. The most extreme is agriculture, forestry and fishing, Hawke's Bays' second largest industry, which contributes 9.1% of the region's GDP in 2023 and had a productivity level of just 68% of the national productivity level.

Chart 13

Top five industries have lower productivity than NZ

Hawke's Bay productivity as % of NZ productivity, 2023



The lower productivity of agriculture in Hawke's Bay may be influenced by the industry composition of the sector. The sector in Hawke's Bay is dominated by horticulture which has lower productivity than other parts of the agricultural sector, for example dairy farming, which are dominant in the national economy.

Table 2 shows the relative size of each industry in Hawke's Bay and its productivity relative to NZ. All industries have lower productivity in Hawke's Bay than in the national economy except retail trade which is approximately equal.

Table 2

Industry productivity is lower in Hawke's Bay than NZ

Industry		GDP (\$m)	Productivity (GDP per filled job)		Hawke's Bay productivity as % of NZ
			Hawke's Bay Region	Hawke's Bay Region	
Code	Name				
A	Agriculture, forestry and fishing	\$936	\$87,132	\$128,478	68%
B	Mining	\$7	\$92,000	\$460,354	20%
C	Manufacturing	\$1,241	\$109,933	\$122,642	90%
D	Electricity, gas, water and waste services	\$225	\$305,435	\$477,299	64%
E	Construction	\$712	\$82,322	\$83,104	99%
F	Wholesale trade	\$446	\$147,276	\$156,987	94%
G	Retail trade	\$617	\$78,397	\$78,256	100%
H	Accommodation and food services	\$224	\$41,873	\$45,264	93%
I	Transport, postal and warehousing	\$422	\$126,332	\$133,437	95%
J	Information media and telecommunications	\$109	\$199,449	\$376,483	53%
K	Financial and insurance services	\$236	\$174,244	\$277,517	63%
L	Rental, hiring and real estate services	\$733	\$346,925	\$358,498	97%
M	Professional, scientific and technical services	\$704	\$126,674	\$132,939	95%
N	Administrative and support services	\$239	\$52,958	\$63,883	83%
O	Public administration and safety	\$371	\$98,150	\$118,592	83%
P	Education and training	\$337	\$50,923	\$61,351	83%
Q	Health care and social assistance	\$819	\$76,755	\$86,616	89%
R	Arts and recreation services	\$76	\$66,755	\$104,653	64%
S	Other services	\$144	\$42,199	\$63,632	66%

Source: Infometrics

Within the region, Hastings District has the highest GDP per capita

Chart 14 shows that among the four territorial authorities in the region, Hastings has the highest GDP per capita and Wairoa the lowest. The differences in GDP per capita are largely explained by the geographic spread of jobs and demographic factors rather than differences in productivity.

Chart 14

Hastings has highest GDP per capita

GDP per capita in 2023 (2023 prices)

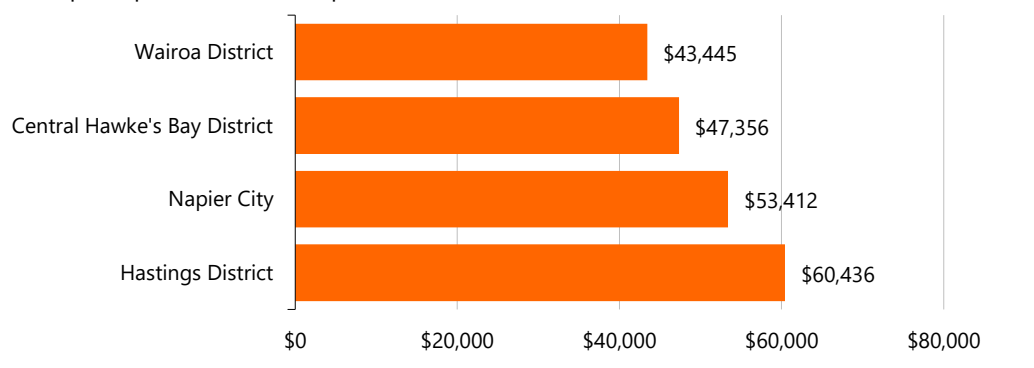
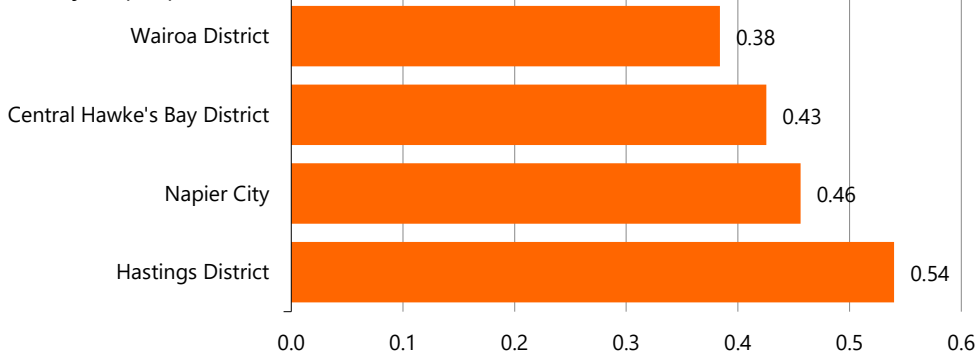


Chart 14 shows that Wairoa has the lowest GDP per capita. Contributing to this is the fact that it has the smallest proportion of its population in the working ages (15-64 years) and has the highest unemployment rate among the four territorial authorities. This means Wairoa has the lowest proportion of its total population in employment and contributing to economic output. This is illustrated in Chart 15 which shows that there are only 0.38 filled jobs per person in Wairoa in 2023, well short of the regional average of 0.49.

Chart 15

Wairoa has fewest jobs per capita

Filled jobs per person, 2023



Hastings has considerably more filled jobs per person than Napier which contributes to its higher GDP per capita. Napier has a lower employment density because it has a high proportion of its land allocated to residential and is a place to live for many people working in Hastings District.

Earnings and household incomes are lower in Hawke's Bay than in NZ

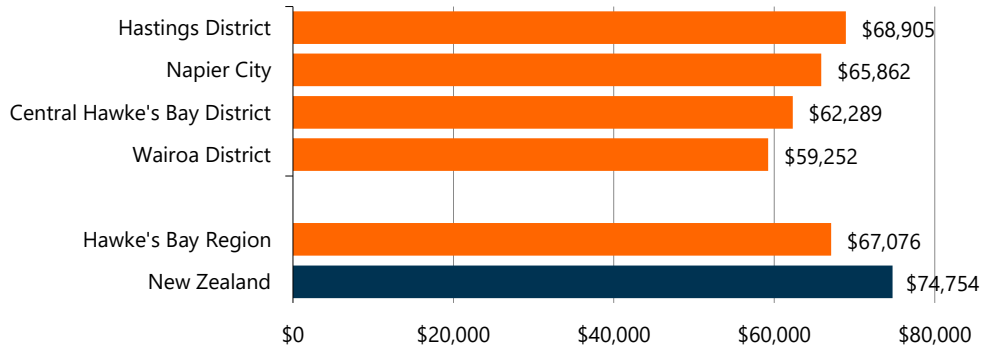
In an earlier section¹⁸ we noted that GDP per capita in Hawke's Bay was lower than in the national economy and that the region's lower productivity was a contributing factor. It follows that the region's lower productivity results in lower average earnings (income earned through employment) in Hawke's Bay.

Chart 16 shows that average earnings per filled job in Hawke's Bay was approximately 10% lower than in New Zealand. Average earnings in the four Hawke's Bay territorial authorities also follow their relative productivity levels. Chart 16 shows that average earnings were highest in Hastings District and lowest in Wairoa District. The gaps in average earnings between the four territorial authorities have stayed relatively constant over the last decade with them experiencing similar rates of growth (all around 4%pa).

Chart 16

Hawke's Bay average earnings lower than NZ

Average earnings per filled job, 2023



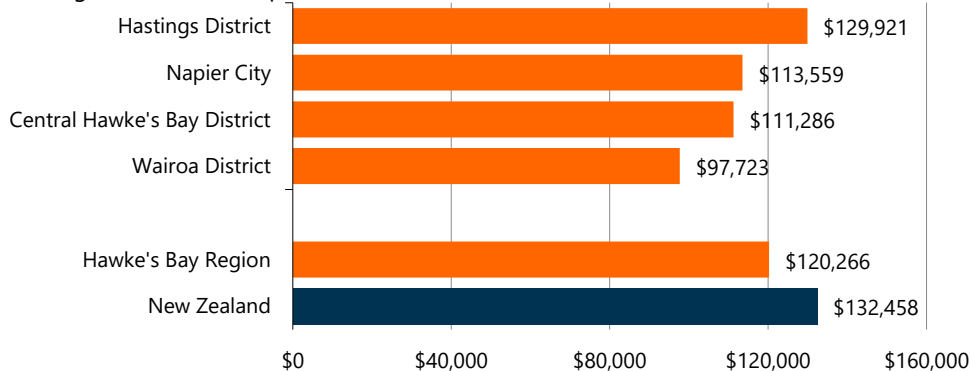
Earnings are the major source of household income, so it follows that household incomes trends in Hawke's Bay are similar to average earnings. Chart 17 shows that the average household income in Hawke's Bay was a touch above \$120,000 per annum in 2023, about 9% below the national household income.

Across the territorial authorities within the region, household incomes were highest in Hastings District (\$129,921) and lowest in Wairoa (\$97,723).

Chart 17

Hawke's Bay household income lower than NZ

Average annual income per household, 2023



The Hawke's Bay labour market

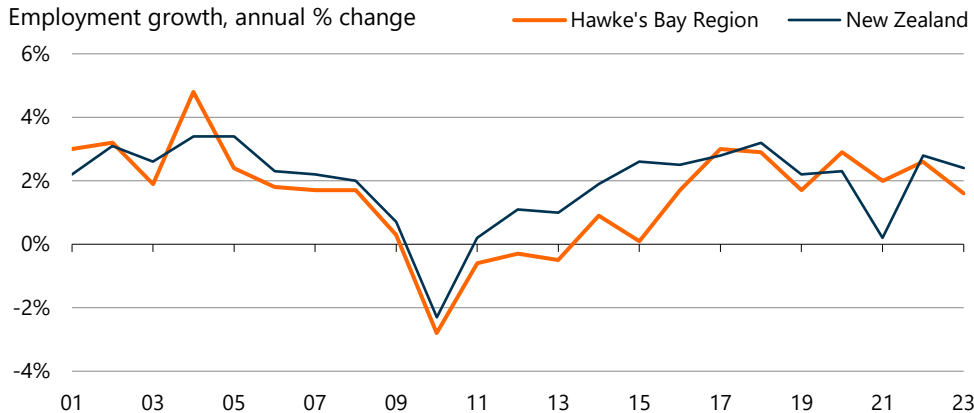
This section describes the growth in employment opportunities in Hawke's Bay and its impact on the unemployment rate and participation in the labour market.

Strong employment growth in Hawke's Bay in recent years

Chart 18 shows over the five years to 2023 employment growth in Hawke's Bay has averaged 2.2%pa, slightly higher than the national average of 2.0%. This is a change in fortunes for the region after lagging the national average for most of the period from 2005 to 2016.

Chart 18

Strong employment growth in recent years

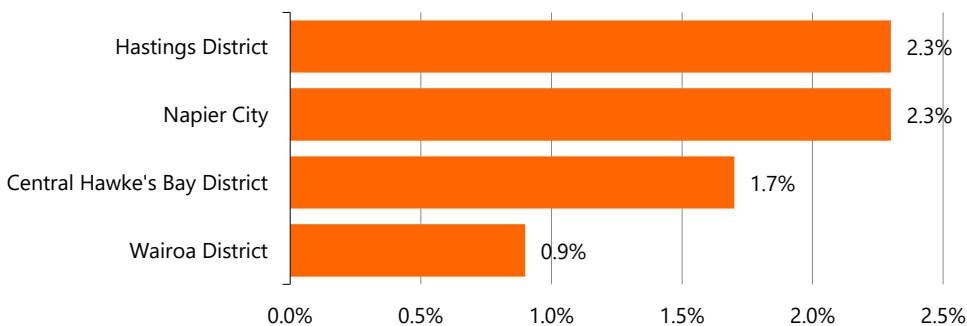


All four of the Hawke's Bay territorial authorities experienced employment growth over the five years to 2023 (Chart 19) with Hastings District and Napier City experiencing the fastest growth.

Chart 19

Highest employment growth in Hastings and Napier

Employment growth, annual average % change, 2018-2023



Construction industry largest contributor to jobs

Employment in the construction industry in Hawke's Bay grew on average by 5.5%pa over the five years to 2023, more than double the regional average of 2.2%. The industry added more than 2,000 jobs to the region's labour market (Chart 20). The recent construction boom in Hawke's Bay started around 2017 and coincides with the acceleration of employment growth in the region. The construction outlook for the Hawke's Bay has weakened considerably, meaning the industry will not be a major contributor to employment growth in the medium term.

Chart 20

Construction is largest job creator in Hawke's Bay

Change in employment, 2018-2023



Chart 20 shows that health care and social assistance, and manufacturing were the next largest contributors to employment growth, expanding by 3.2%pa and 2.2%pa respectively and adding 1,539 and 1,183 jobs respectively over the five-year period.

Hawke's Bay's unemployment rate has dropped below NZ rate

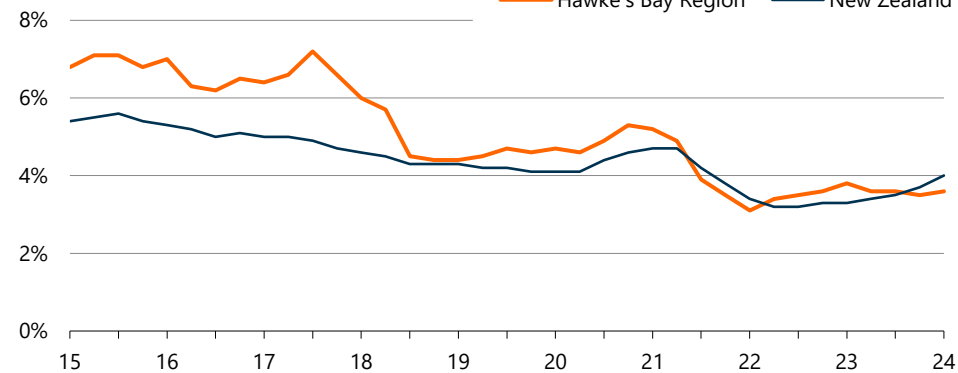
Historically, Hawke's Bay's unemployment rate has been above the national average but has been falling over the past year and as at March 2024 was below the national rate. Hawke's Bay's annual average unemployment rate over the year to March 2024 was 3.6%, compared with 4.0% nationally (Chart 21).

The gap between the unemployment rate in Hawke's Bay and nationally was at its peak in September 2017 when the rate in Hawke's Bay was 2.3 percentage points higher than the national rate. The fall in the unemployment rate from its peak in 2017 has coincided with the uptick in employment growth.

Chart 21

Unemployment has fallen below the national rate

Unemployment rate, annual average %



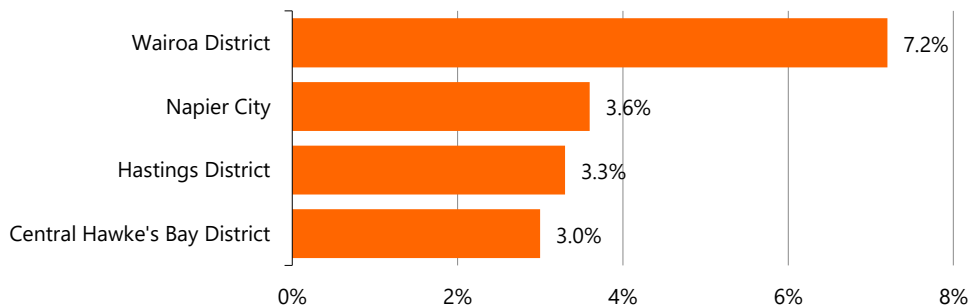
Uneven unemployment outcomes across the region

Wairoa has a much higher unemployment rate than the other territorial authorities in Hawke's Bay, with its rate sitting at 7.2% over the year to March 2024 (Chart 22). Contributing factors to its high unemployment rate are limited job opportunities, geographical isolation, and its dependence on agriculture and forestry which have a strong seasonal component.

Chart 22

Unemployment outcomes differ across the region

Annual average unemployment rate, March 2024



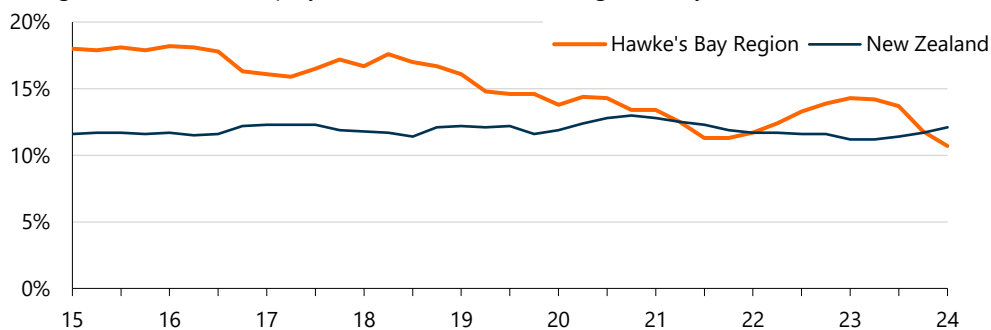
NEET rate has fallen sharply in Hawke's Bay

As more employment opportunities have arisen in Hawke's Bay in recent years, the NEET rate (those people aged 15 to 24 not in employment, education, or training) has fallen sharply (Chart 23). The Hawke's Bay's NEET rate was sitting at 10.7% in March 2024, compared to 12.1% nationally. The NEET rate has trended down since 2018 in the Hawke's Bay while nationally it has remained relatively constant.

Chart 23

The NEET rate has declined sharply in the Hawke's Bay

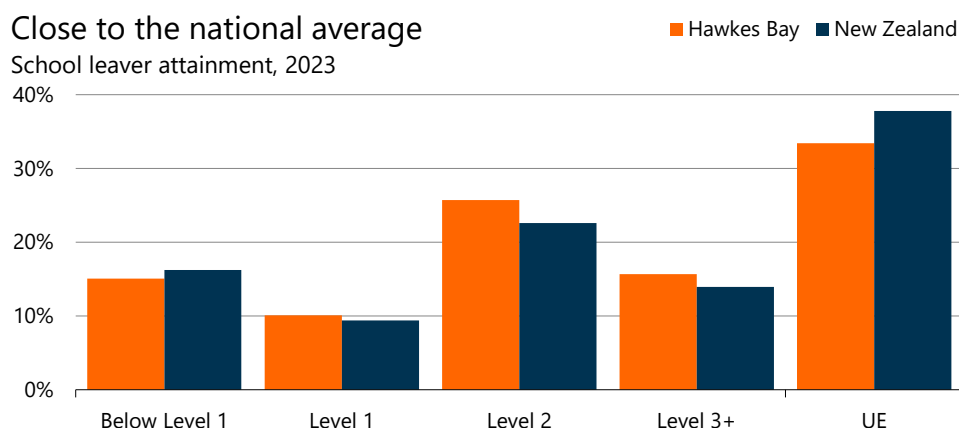
% aged 15-24 not in employment, education or training, March years



School leaver attainment close to the national average, but worsening

School leaver attainment in Hawke's Bay sat close to the national average in 2023, although attainment at the crucial University Entrance (UE) level is below average (Chart 24). Some 25% of Hawke's Bay school leavers attained NCEA Level 1 or below compared with the national average of 26%, 41% attained NCEA Levels 2 or 3 compared with the national average of 37%, and 33% attained UE compared with 38% nationally.

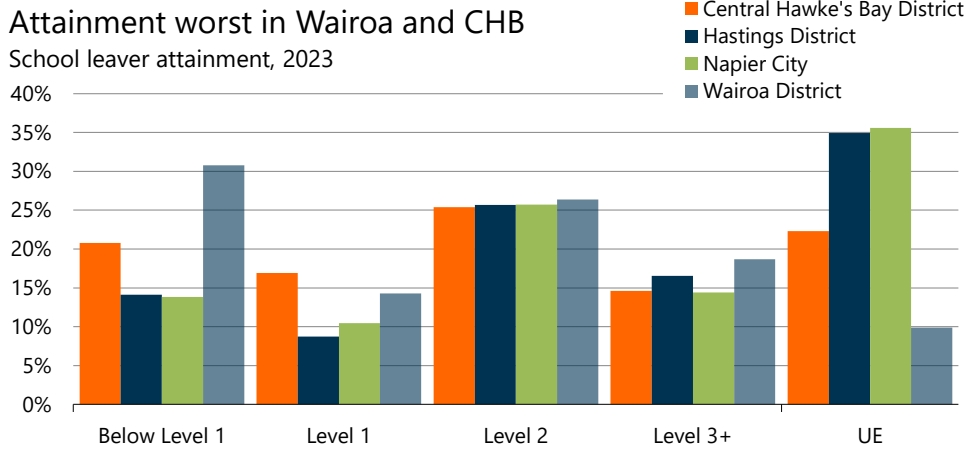
Chart 24



The COVID-19 pandemic disrupted school education and, with it, school leaver attainment. Between 2019 and 2023, the proportion of Hawke's Bay school leavers attaining NCEA Level 1 or below rose from 19% to 25%. The proportion attaining UE fell from 41% to 33%. These shifts, which reflect national trends, will most likely have implications for young peoples' post-school qualification attainment and labour market activities. For instance, school leavers attaining NCEA Level 1 or below are more likely to be NEET in the years after they leave school than school leavers with higher attainment.

Perhaps most concerning of all is that school leaver attainment is significantly worse in Wairoa District and Central Hawke's Bay District (Chart 25). In 2023, 45% of school leavers in Wairoa District and 38% in Central Hawke's Bay District attained NCEA Level 1 or below compared with 23% in Hastings District and 24% in Napier City. Among the highest attainers, just 10% of school leavers in Wairoa District and 22% in Central Hawke's Bay District attained UE compared with 35% in Hastings District and 36% in Napier City.

Chart 25



A key reason for the lower school leaver attainment in Wairoa District is the gap between Māori and non-Māori school leaver attainment. Across Hawke's Bay in 2023, 38% of Māori school leavers attained NCEA Level 1 or below compared with 17% of non-Māori school leavers. In contrast, just 17% of Māori school leavers attained UE compared with 44% of non-Māori. With a significant Māori population in Wairoa, this attainment gap is reflected in the district's overall school leaver attainment results.

Wellbeing in Hawke's Bay

In this section we draw on the Infometrics Regional Wellbeing Framework to compare wellbeing outcomes in Hawke's Bay with the national average. The framework provides insights into how each region and territorial authority of New Zealand compare across a range of wellbeing metrics. The framework uses 30 objective indicators of wellbeing across nine wellbeing domains. It focusses on outcomes for people and communities and shows how outcomes in each domain and indicator have changed over time.

Hawke's Bay has mostly lower wellbeing outcomes than NZ

Chart 26 shows the wellbeing radar for Hawke's Bay. The radar shows the domain score for each of the nine wellbeing domains. A higher score (closer to the perimeter) indicates a higher wellbeing outcome. In 2023, the region only outperformed New Zealand in two wellbeing domains: housing and civil engagement and governance.

Chart 26



Hawke's Bay outperformed NZ in housing and civic engagement domains

Hawke's Bay's better performance in the **housing** domain was due to more affordable housing and a higher home ownership rate. On the negative side, Hawke's Bay has lower rental affordability than the New Zealand average. The household crowding rate was similar.

The region performed better in **civic engagement and governance** due to a higher general election turnout, although this was partially offset by a lower local election turnout.

But underperformed in all other domains

Hawke's Bay Region underperformed the New Zealand average in the following wellbeing domains (in order of underperformance, largest underperformer first):

- **Safety:** Hawke's Bay has a much higher workplace injury rate and crime rate and a slightly higher road fatality rate.
- **Income and consumption:** Hawke's Bay has significantly lower earnings, household incomes, and a higher benefit dependency ratio.
- **Environment:** Hawke's Bay has a much lower waste diversion rate and slightly higher per capita carbon dioxide emissions.
- **Social connections:** Hawke's Bay has a significantly higher dependency ratio (number of under 15-year-olds and over 65-year olds as a ratio of the rest of the

population), a slightly higher working commute time and lower internet access rate. On the positive side, Hawke's Bay has a slightly lower truancy rate than the New Zealand average.

- **Jobs and earnings:** Hawke's Bay has a significantly smaller proportion of its workforce in skilled jobs, a higher NEET rate, and more workers in declining industries.
- **Health:** Hawke's Bay has a significantly higher suicide rate, slightly lower life expectancy, and drinking water quality, and a similar mental health presentation rate.
- **Knowledge and skills:** Hawke's Bay's adult population has a significantly lower proportion with NCEA Level 3 and a lower proportion of the region's school leavers transition to tertiary education. On the positive side the region's adult population has a slightly higher proportion with NCEA Level 2 and a higher early childhood education participation rate.

Napier City has the best wellbeing outcomes

The wellbeing radar for each of the four Hawke's Bay territorial authorities are shown in the *Statistical and graphical appendix* at the end of this report.

Napier City performs the best among the four territorial authorities. It exceeds the New Zealand average for knowledge and skills and civic engagement and governance and is very close for health and housing. For environment and jobs and earnings it is further behind and falls far short of the national average for safety and income and consumption.

Central Hawke's Bay District performs well in civic engagement and governance and housing relative to the New Zealand average and is very close in health. However, it falls well short in social connections, income and consumption, safety, jobs and earnings, environment, and knowledge and skills.

Hastings only outperforms the national average in housing. It falls short in all other domains, especially in the safety domain due to its high crime rate and workplace injury rate.

Wairoa has the lowest wellbeing outcomes overall falling far short of the national average in most domains. However, it does outperform the national average in civic engagement and governance due to its much higher local election turnout. It also performs better in the housing domain due to its more affordable housing.

Māori in the Hawke's Bay economy and labour market

Māori employment has grown rapidly

Over the past ten years the number of Māori employed in Hawke's Bay has risen from under 15,000 in 2013 to well above 22,000 by 2023. Over this period Māori employment has grown on average 4%pa compared with 1.4% for non-Māori.

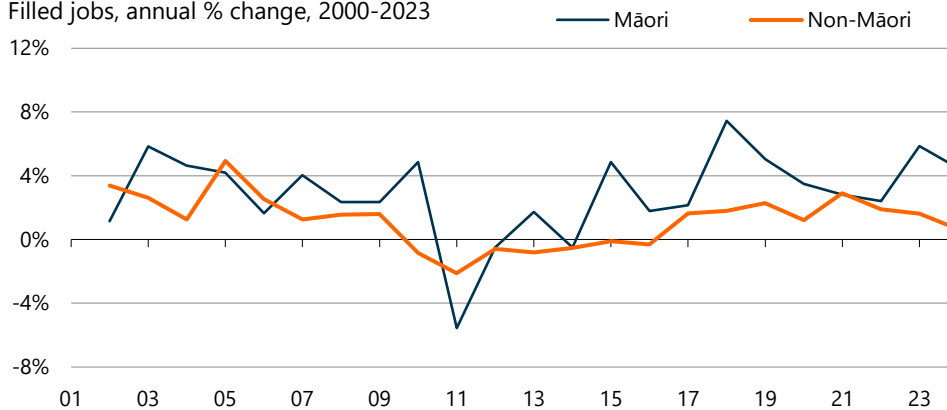
Chart 27 shows that Māori employment growth in the Hawke's Bay exceeded non-Māori employment growth in most years since 2000. A notable exception was in the aftermath of the global financial crisis (GFC) when industries employing large numbers of Māori, particularly construction, were very hard hit. Māori employment declined by 5.5% in 2010.

The rapid growth in Māori employment has resulted in a large increase in the Māori share of total employment in Hawke's Bay. In 2000 approximately 18% of jobs were filled by Māori, rising to a quarter (25%) in 2023.

Chart 27

Māori employment grown much faster than non-Māori

Filled jobs, annual % change, 2000-2023



Māori employment in Hawke's Bay is concentrated in lower skilled industries

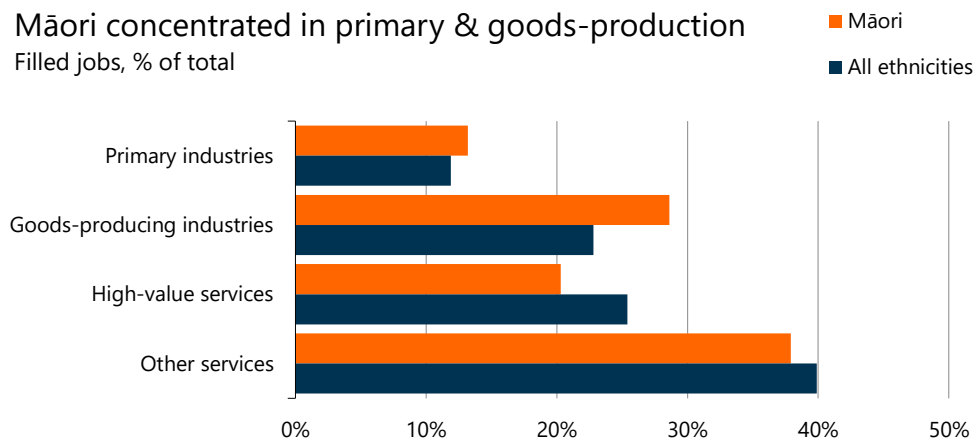
Māori workers are overrepresented in the primary industries (in Hawke's Bay mostly agriculture, forestry and fishing) and goods producing industries (manufacturing, electricity, gas and water, and construction), both of which tend to require lower skilled workers (Chart 28).

Māori are especially underrepresented in the high value services (includes professional services, healthcare and education) which typically require high-level skills.

Chart 28

Māori concentrated in primary & goods-production

Filled jobs, % of total



However, there has been good progress in Māori moving into the high-value services. The proportion of Māori in high-value services increased from 18.7% in 2013 to 20.3% ten years later. Over the same period there was a significantly smaller increase in the proportion of the total workforce employed in the high-value services (from 24.2% in 2013 to 25.4% in 2023) which indicates higher growth in employment in high-value services among Māori than other ethnicities.

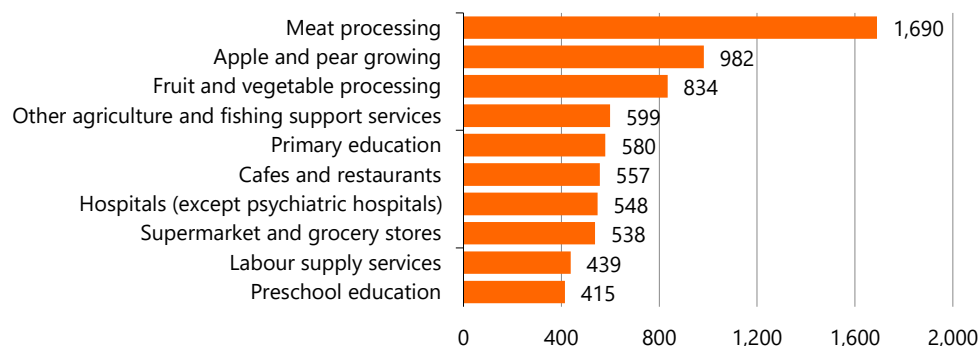
Meat processing is by far the largest employer of Māori in Hawke's Bay

Turning our focus to a finer level of industry classification (at level 4 of the Australia New Zealand Standard Industrial Classification, which comprises about 500 industries) reveals that meat processing is by far the largest employer of Māori workers (Chart 29). In 2023, there were 1,690 workers employed in the industry, which amounted to 7.6% of Māori workers. The next largest were apple and pear growing (982, 4.4%) and fruit and vegetable processing (834, 3.8%).

Chart 29

Meat processing is largest employer of Māori

Filled jobs by ANZSIC level 4 industries, 2023



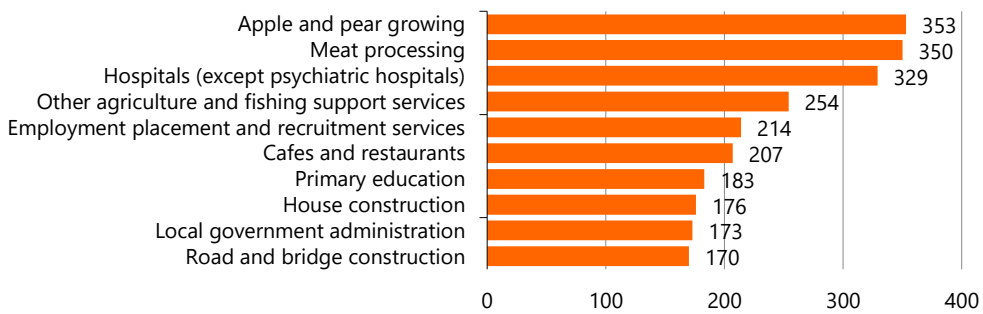
Apple and pear growing has created the most new jobs for Māori

In an earlier section we noted that Māori employment had grown very fast over the past ten years (p23). Chart 30 shows the ten industries which created the most jobs for Māori over the 10 years to 2023. Industries that require lower skill levels are in the majority but there a few industries requiring higher skills including hospitals, primary education, and local government.

Chart 30

Apple & pear growing creates most new jobs for Māori

Increase in filled jobs for Māori, 2013-2023



Māori unemployment has fallen sharply, still higher than Hawke's Bay average

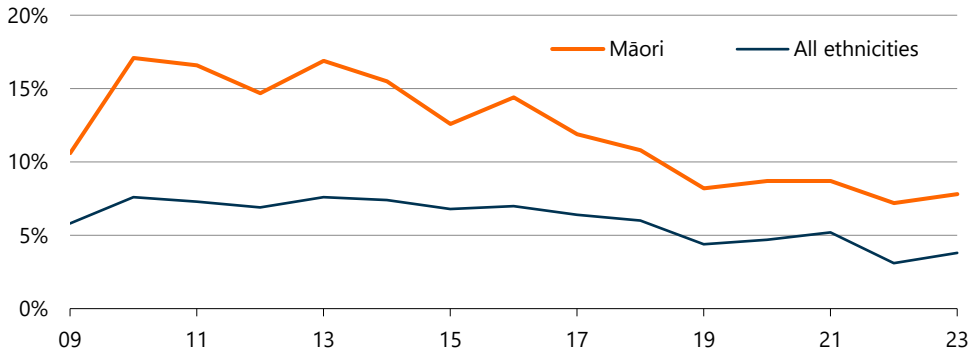
The rapid growth in employment of Māori over the last decade and more has resulted in the Māori unemployment rate in Hawke's Bay declining from a post GFC high of 17.1% in 2010 to 7.8% in 2023 (Chart 31).

Māori were very hard hit by the GFC with the Māori unemployment rate rising 6.5 percentage points in 2010 to 17.1%. It took nearly a decade for the rate to recover to the pre-GFC rate.

Chart 31

Māori unemployment rate higher than region average

Unemployment rate, 2009-2023



The sharp fall in the Māori unemployment rate since 2010 has resulted in a closing of the gap between the Māori rate and the rate for all ethnicities. The gap was at its widest in 2010 when it stood at 9.5 percentage points and declined to 3.8 percentage points by 2019. Since 2019 the gap has persisted at around four percentage points. In 2023 the Māori unemployment rate stood at 7.8% compared with 3.8% for all ethnicities.

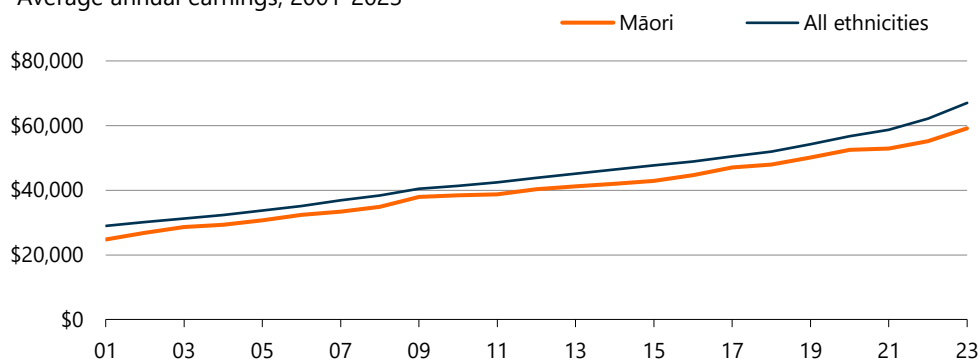
Average Māori earnings are lower than average across all ethnicities

The average earnings of Māori workers in Hawke's Bay was \$59,200 in 2023 compared with an average of \$67,100 across all ethnicities (Chart 32). The gap between Māori and the average for all ethnicities has widened, especially in recent years. This indicates that new jobs created for Māori in the recent years have lower average wages than the all ethnicities average. This is consistent with an earlier finding which showed that many industries that were creating the largest number of new jobs for Māori were lower skilled industries.

Chart 32

Average Māori earnings below overall average

Average annual earnings, 2001-2023



Higher proportion of businesses in Hawke's Bay are Māori owned

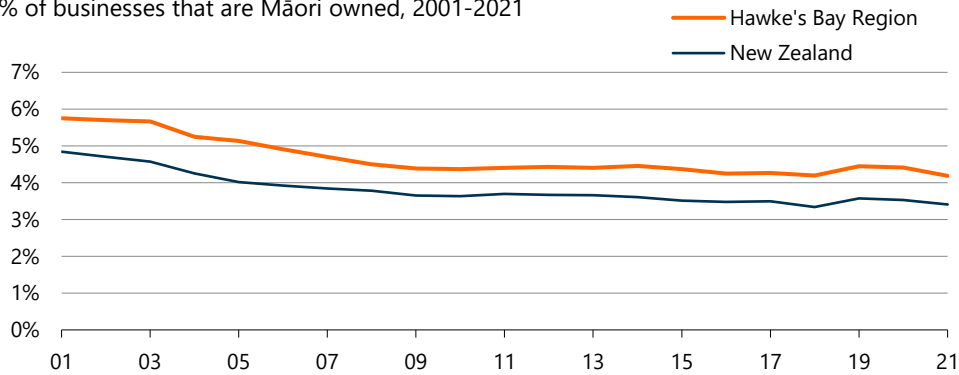
In 2021 there were 831 Māori businesses in Hawke's Bay which amounted to 4.2% of total businesses in the region. This was higher than in the national economy, in which 3.4% of businesses were Māori.

Chart 33 shows that the proportion of businesses that are Māori owned in Hawke's Bay declined over the period 2001 to 2009 and thereafter stayed approximately constant. A Māori business is a business with at least one owner of Māori ethnicity and/or descent.

Chart 33

More Māori owned businesses in Hawke's Bay

% of businesses that are Māori owned, 2001-2021



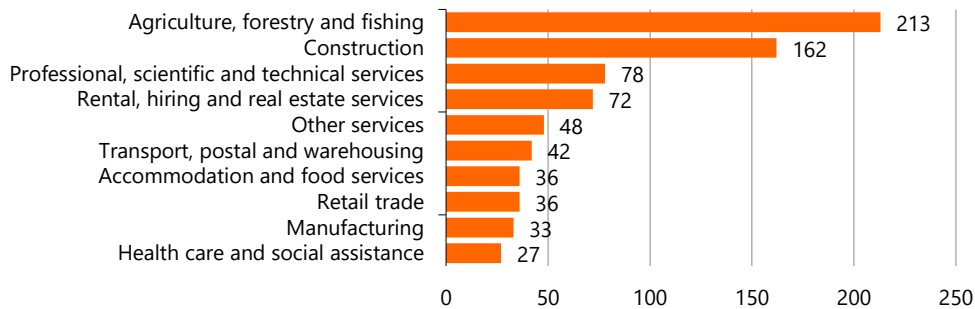
Māori businesses are concentrated in agriculture and construction

Nearly half of all Māori businesses are in the agriculture and construction industries. Chart 34 shows that the industries with the next largest number of Māori businesses were professional, scientific and technical services (9.3% of all Māori businesses), rental hiring and real estate services (8.6%) and other services (5.7%).

Chart 34

Māori business concentrated in agri and construction

Maori businesses ranked by ANZSIC Level 1 industries



Pacific Peoples in the Hawke's Bay economy and labour market

Employment of Pacific Peoples has jumped sharply over last decade

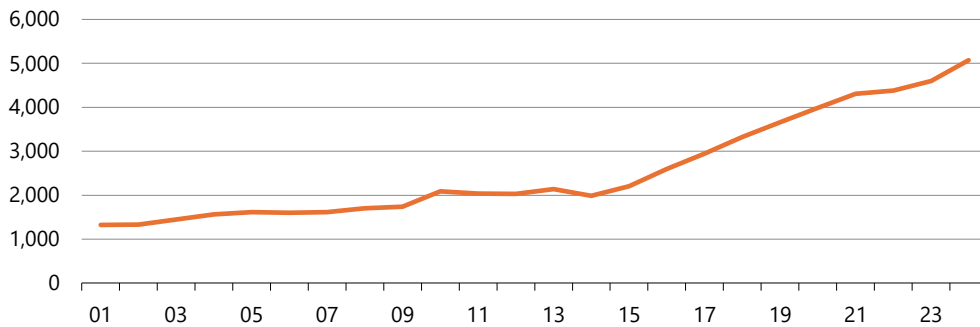
The number of Pacific Peoples in employment in the Hawke's Bay grew from fewer than 2,000 in 2013 to over 5,000 in 2023 (Chart 35). The rate of growth of nearly 10%pa considerably exceeds the rate of Māori employment growth (4.0%pa) and all ethnicities

(1.9%) over the same period. By 2023 Pacific Peoples accounted for 5.6% of total employment in Hawke's Bay, up from just 2.6% in 2013.

Chart 35

Growth in Pacific Peoples employed in Hawke's Bay

Jobs filled by Pacific Peoples, 2000-2023



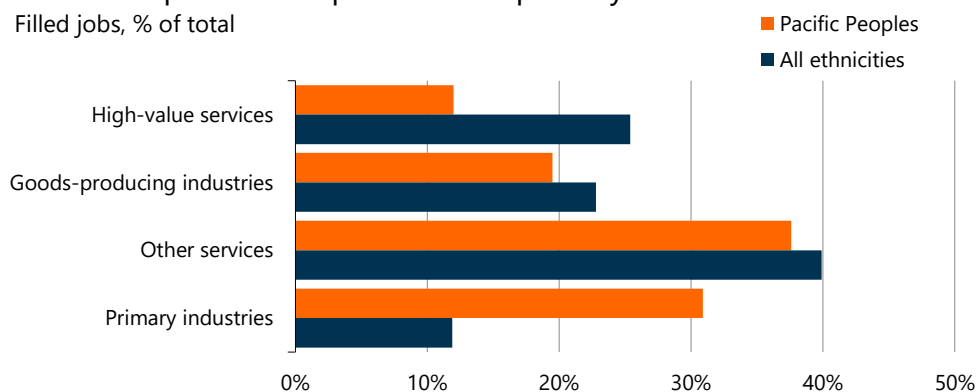
Pacific Peoples employment in Hawke's Bay is concentrated in the primary sector and low-value services

Nearly two-thirds of Pacific Peoples workers were employed in the primary industries and (low value) other services sectors in Hawke's Bay in 2023 (Chart 36). They are considerably under-represented in high-value services, which account for just 12% of their employment, compared with more than 25% among all ethnicities.

Chart 36

Pacific Peoples over-represented in primary industries

Filled jobs, % of total



Apple and pear growing is largest Pacific Peoples employer

Employment of Pacific Peoples is heavily focused on the agricultural industry and the related food processing and agricultural support services industries. Chart 37 shows that among the top 10 largest industries (at ANZSIC level 4) only Hospitals (eighth largest employer) and Cafes and restaurants (tenth largest) are not closely linked to these sectors.

Chart 37

Many Pacific Peoples work in apple & pear growing
Filled jobs by ANZSIC level 4 industries, 2023

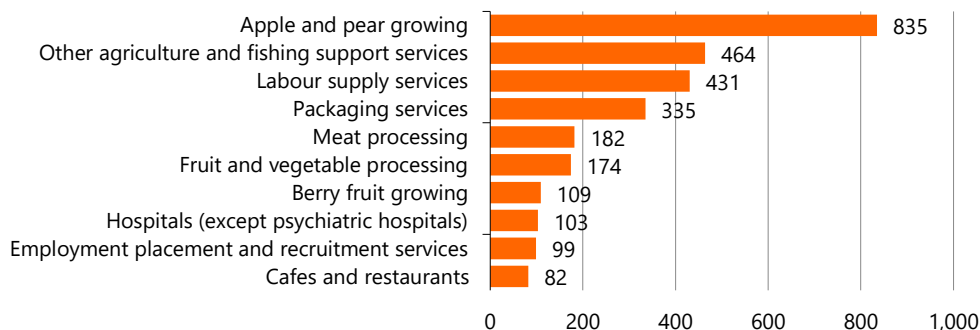
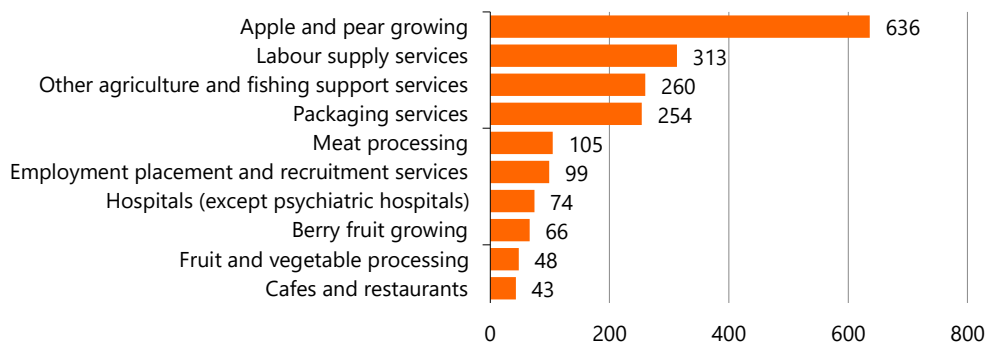


Chart 38 shows that a similar range of industries, most closely linked to agriculture and food processing, were the largest creators of new jobs for Pacific Peoples over the ten years to 2023. Apple and pear growing alone created 636 jobs for Pacific Peoples over the period.

Chart 38

Apple & pear growing creates jobs for Pacific Peoples
Increase in filled jobs, 2013-2023



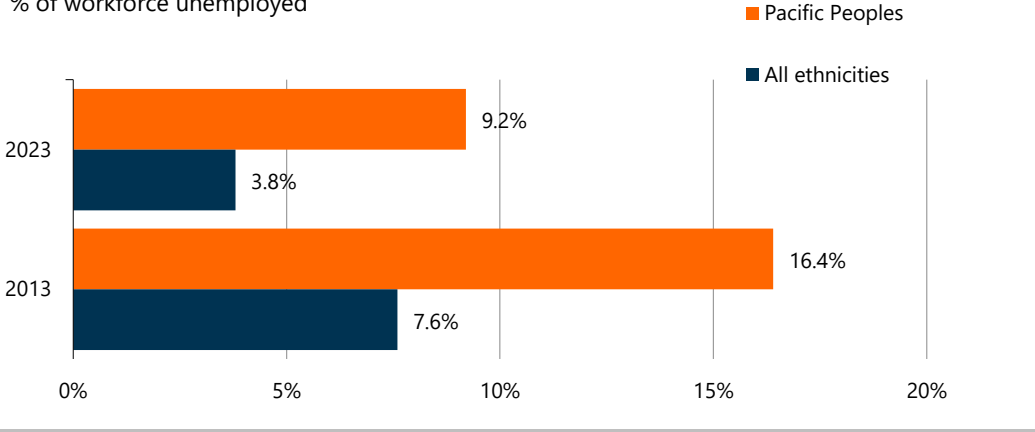
Unemployment rate among Pacific Peoples is very high

Despite strong employment growth of Pacific Peoples in Hawke's Bay over the past decade, the unemployment rate of Pacific People was sitting at a very high rate of 9.2% in 2023, well above the average rate for all ethnicities of 3.8%. Chart 39 shows that the Pacific Peoples unemployment rate has declined considerably since 2013 (when it stood at 16.4%) but has maintained a wide gap with the average for all ethnicities.

Chart 39

Pacific Peoples experience higher unemployment

% of workforce unemployed



Statistical and graphical appendix

Table 3

Contribution to GDP growth by ANZSIC L1 industries

ANZSIC Level 1 industries	GDP (\$m)		Absolute growth (\$m)	Annual growth
	2018	2023		
Professional, scientific and technical services	502.2	703.8	201.6	5.8%
Health care and social assistance	645.1	818.9	173.8	4.1%
Construction	591.2	712	120.8	3.1%
Retail trade	504.7	617.3	112.6	3.4%
Manufacturing	1131.8	1240.7	108.9	1.5%
Rental, hiring and real estate services	624.8	733.4	108.6	2.7%
Wholesale trade	355.5	446.1	90.6	3.9%
Public administration and safety	313.8	371.4	57.6	2.8%
Administrative and support services	183.7	239	55.3	4.5%
Information media and telecommunications	72.1	108.5	36.4	7.0%
Electricity, gas, water and waste services	192	224.8	32.8	2.7%
Accommodation and food services	192.1	224.4	32.3	2.6%
Other services	121.2	143.9	22.7	2.9%
Transport, postal and warehousing	406.4	422.2	15.8	0.6%
Financial and insurance services	220.4	236.1	15.7	1.2%
Arts and recreation services	66.7	75.9	9.2	2.2%
Mining	11.2	6.9	-4.3	-7.8%
Agriculture, forestry and fishing	945.5	935.8	-9.7	-0.2%
Education and training	348.9	336.6	-12.3	-0.6%
Total	8865.5	10320.7	1455.2	2.6%

Chart 40. Industries with largest contribution to GDP growth between 2018-2023

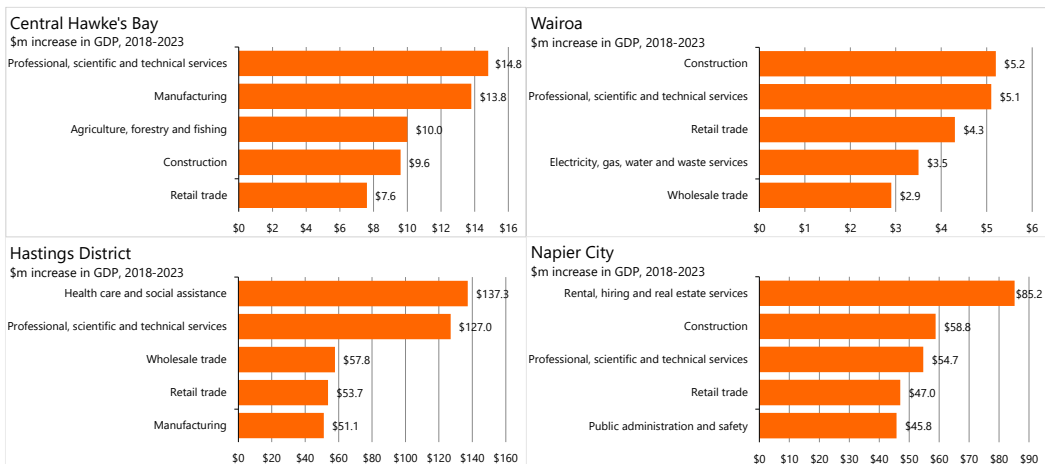


Table 4

Exports by goods categories, 2023

Goods type	Hawke's Bay		New Zealand	
	Level	% of total	Level	% of total
Apples, pears and other fruit	\$575.4	17.4%	\$1,098.8	1.6%
Bovine meat (beef)	\$486.4	14.7%	\$4,620.8	6.6%
Sheep and goat meat	\$434.2	13.1%	\$4,124.9	5.9%
Other natural exports including wood pulp, paper and live animals	\$349.8	10.5%	\$2,732.8	3.9%
Beverages, spirits and vinegar	\$259.7	7.8%	\$2,713.0	3.9%
Other food products	\$230.2	6.9%	\$2,036.8	2.9%
Unallocated	\$219.9	6.6%	\$8,050.9	11.5%
Natural fabrics including wool, skins, hair, hides and leather	\$191.6	5.8%	\$744.3	1.1%
Fish and crustaceans, molluscs and other aquatic invertebrates	\$95.6	2.9%	\$1,798.9	2.6%
Vegetables, roots and tubers, edible	\$86.3	2.6%	\$486.2	0.7%
Other meat including offal	\$57.6	1.7%	\$591.4	0.8%
Boilers, machinery and appliances and parts thereof	\$48.3	1.5%	\$1,587.9	2.3%
Edible preparations, miscellaneous	\$41.8	1.3%	\$604.6	0.9%
Sound and television image recorders and reproducers, and parts thereof	\$39.5	1.2%	\$973.2	1.4%
Jewellery, pearls and other precious metals and stones	\$34.3	1.0%	\$722.1	1.0%
Fresh kiwifruit and berries	\$29.4	0.9%	\$2,676.0	3.8%
All other goods exports with a national export value under \$100m	\$20.6	0.6%	\$1,138.3	1.6%
Pharmaceuticals, chemicals, and essential oils	\$15.9	0.5%	\$639.1	0.9%
Iron, steel and copper and articles thereof	\$15.3	0.5%	\$905.7	1.3%
Honey, eggs and other animal products	\$14.1	0.4%	\$422.3	0.6%
Other wood products including sawn, chipped, sliced or peeled wood	\$13.7	0.4%	\$1,597.0	2.3%
Milk and cream; concentrated or sweetened	\$11.2	0.3%	\$10,502.5	15.1%
Other manufactured articles including plastics, furniture and vehicles	\$11.0	0.3%	\$766.4	1.1%
Aluminium and articles thereof	\$10.5	0.3%	\$1,598.3	2.3%
Optical, photographic and cinematographic devices	\$5.8	0.2%	\$918.1	1.3%
Butter and other fats and oils derived from milk	\$4.6	0.1%	\$4,462.5	6.4%
Preparations of cereals, flour, starch or milk	\$3.1	0.1%	\$2,217.8	3.2%
Dairy products not otherwise included	\$3.0	0.1%	\$2,691.2	3.9%
Cheese and curd	\$2.9	0.1%	\$2,775.6	4.0%
Modified starches; glues; enzymes	\$2.5	0.1%	\$2,539.0	3.6%
Logs, whether or not stripped of bark or sapwood, or roughly squared	\$1.6	0.0%	\$17.5	0.0%
Mineral fuels, oils and waxes, and bituminous substances	\$0.0	0.0%	\$995.6	1.4%
Total	\$3,315.9	100%	\$69,749.5	100%

Source: Infometrics

Chart 41. Wellbeing radar for Wairoa District, 2023



Chart 42. Wellbeing radar for Central Hawke's Bay District, 2023

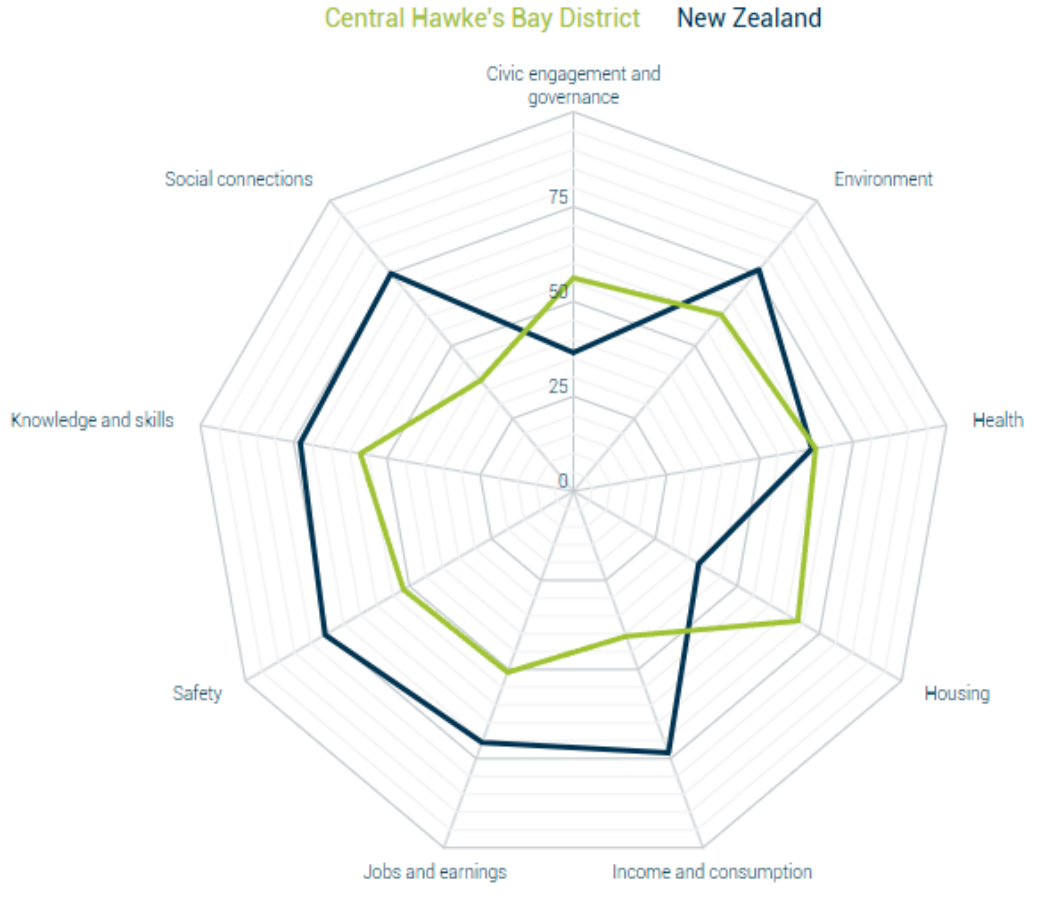


Chart 43. Wellbeing radar for Napier City, 2023



Chart 44. Wellbeing radar for Hastings District, 2023

