Regional Fact Sheet

TE TAUIHU-O-TE-WAKA/MARLBOROUGH

July 2025

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Te Uru Rākau New Zealand Forest Service

Current state of the forestry and wood processing industries in Te Tauihu o Te Waka-a-Māui/Marlborough.

The Marlborough region sits at the top of the South Island, north of Canterbury and east of Nelson and Tasman. The south and west are mountainous while the centre is a valley (of the Wairau River) which stretches northeast. The region has a dry climate.

$4.4 billion
Regional GDP for year ended March 2024
(1% of National GDP)

$383 million
GDP in forestry, fishing, mining, electricity, gas, water, and waste services, year ended March 2023
(5% of the GDP for the region)

$84,296
GDP per capita year ended March 2024
(national GDP per capita $78,233)

52,000
Estimated regional population 2023 Census
(1% of New Zealand's total)

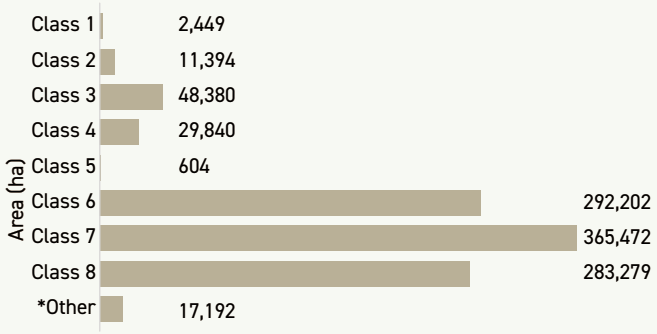
237
Number of new dwelling consents for all construction in 2024
(-8.5% change from 2023)

15%
Population that identifies as Māori, 2023 Census
(19.6% nationally)

Source: Gross domestic product (GDP) – Stats NZ.

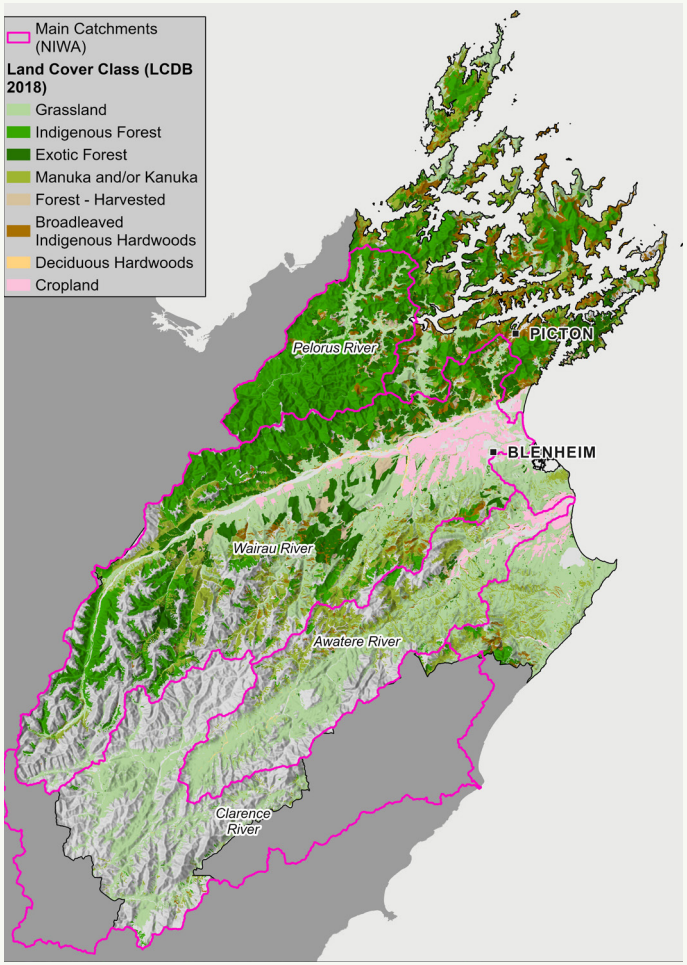
Land use capability

Figure 1. Area in hectares by LUC class. Source: LUC database 2021



**Other: Estuaries, lakes, quarries, rivers, towns.*

Figure 2. Map: Land cover in Marlborough. Source: Land Cover Database (LCDB5) – LRIS.
View a high-resolution version of the land cover in Marlborough map.



The Land Use Capability (LUC) system classifies land into eight categories based on its ability to support various productive uses over time, considering physical constraints and specific management requirements. The classification considers physical attributes of land such as climate, soil, slope, vegetation and erodibility. Classes 1 to 4 are generally suitable for all ranges of cultivation. Classes 5 to 7 tend to be suitable for pastoral farming and forestry. Class 8 has severe limitations for primary production or forestry use.

5.9% of the land area in the region is classified as highly productive land (LUC 1 to 3). 61.7% of the land area in the region is classified as LUC 7 and 8 (land with slight to severe limitations for productive land uses).

Sources: Our Environment - Manaaki Whenua Landcare Research and Target land and land use capability classes - MPI

Existing land cover

Marlborough's total land area is 10,457.9 sq km (1,045,790 hectares (ha)) making up 4.0% of the total area of New Zealand.

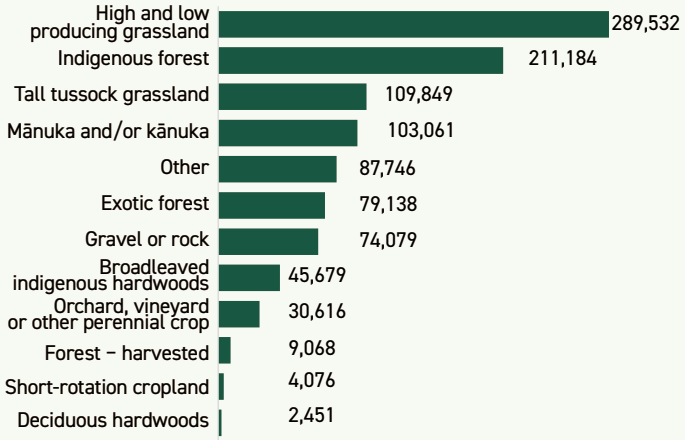
New Zealand's regions are primarily determined by areas of water collection into rivers, known as catchments. The four largest catchments in the region are the Wairau River (403,250.6 ha), the Clarence River (157,751.7 ha), the Awatere River (157,412.3 ha) and the Pelorus/Te Hoiere River (88,635.8 ha). All other catchments in the region are less than 500 ha.

27.7% (289,532 ha) of the region's land is covered in high and low producing grassland. Followed by 20.2% (211,184 ha) which is covered by indigenous forest, and 10.5% (109,849 ha) covered by tall tussock grassland.

Source: Geographic boundary viewer - Stats NZ

Existing forest cover using Land Cover Database

Figure 3. Area in hectares of different land covers in Marlborough. Source: Land Cover Database (LCDB5) 2018



Exotic forest covers 7.6% (79,138 ha) of the region's total land area.

Deciduous hardwood such as willows, poplars, oaks, elms and ashes, cover 0.2% (2,451 ha).

Indigenous forest covers 20.2% (211,184 ha) of the region's total land area.

Mānuka and kānuka, which can act as a nursery crop in a reversion towards forest, covers 9.8% (103,061 ha).

Broadleaved indigenous hardwoods such as wineberry, mahoe, *Pittosporum spp*, fuchsia, tutu, titoki and tree ferns, cover 4.4% (45,679 ha) of the region's land.

Forest – harvested includes bare ground where exotic forest was harvested or, less commonly, indigenous forest. It covers 0.9% (9,068 ha) of Marlborough.

Other includes urban settlements, gravel, rocks, lakes, rivers, sand, among others. It covers 8.4% (87,745 ha) of the Marlborough region.

Source and forest type definitions: Land Cover Database (LCDB5)

National Exotic Forest Description (NEFD 2024)[1] for Marlborough and Kaikōura[2]

Marlborough and Kaikōura are part of the Nelson Marlborough wood supply region. The wood supply regions are areas grouped by the National Exotic Forest Description (NEFD).

Figure 4. Comparing Marlboroughand Kaikōura and New Zealand on exotic forestry facts. Source: NEFD 2024

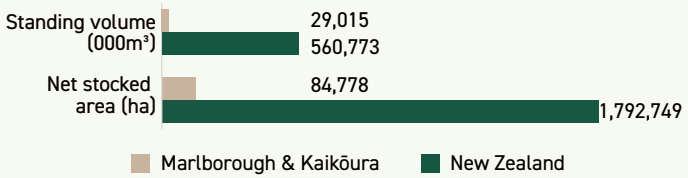
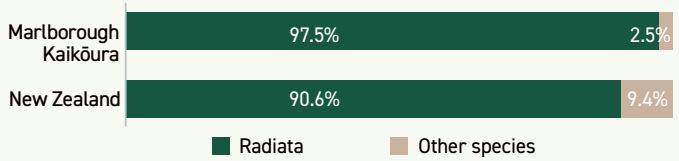


Figure 5. Proportion of exotic forest species in Marlborough and Kaikōura in comparison to New Zealand. Source: NEFD 2024



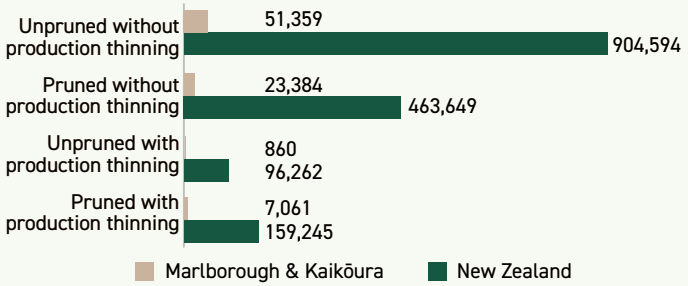
The average age of exotic forest in the Marlborough and Kaikōura is 19.6 years, compared to 18.6 years nationally.

Radiata pine comprises 97.5% (82,665 ha) of the exotic forest in the region. Other exotic forestry species planted in the region are: 1.2% Douglas-fir (1038 ha), 0.3% cypress (219 ha), 0.2% eucalyptus (200 ha), 0.5% other softwoods such as redwoods (429 ha), and 0.3% other hardwoods such as acacia and blackwood (221 ha).

27.1% (21,713 ha) of the total planted area of radiata pine forest in Marlborough and Kaikōura is of potentially harvestable age (age 26–30 years). Compared to 20.8% of the national total planted area that is of potentially harvestable age.

1 The 2024 National Exotic Forest Description (NEFD) – MPI provides a detailed description of New Zealand's planted production forest.
2 Nelson Marlborough wood supply region includes Marlborough District, Kaikōura District, Nelson District and Tasman District. Nelson District and Tasman District NEFD data are reported in the Nelson Tasman factsheet.

Figure 6. Number of hectares of pruned and unpruned regimes of radiata pine in Marlborough and Kaikōura. Source: NEFD 2024



The forest area broken down by NEFD forest owner national size class for the Nelson and Marlborough wood supply region is:

Table 1. Nelson and Marlborough wood supply region forest area by national size class. Source: NEFD 2024*

	< 40 ha	40–99 ha	100–999 ha	1,000–9,999 ha	10,000+ ha
Area (ha)	25,015	11,382	25,396	30,440	86,610
Number of forest owners	NA	182	122	13	3

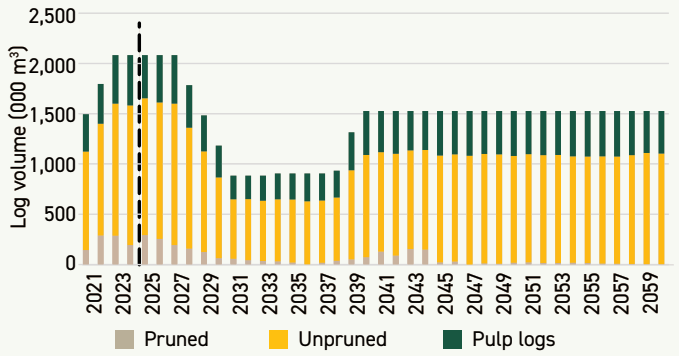
**The Nelson and Marlborough wood supply region includes Nelson City, Tasman District, Marlborough District and Kaikōura District.*

Wood Availability Forecast (WAF)

Figure 7 shows the availability of pruned, unpruned and pulp logs between 2021 and 2060, for the region. Wood availability is forecast to drop under 900,000 m³ per annum between 2031 and 2038. From 2040 onwards the wood availability is forecast to be around 1.5 million m³ per year.

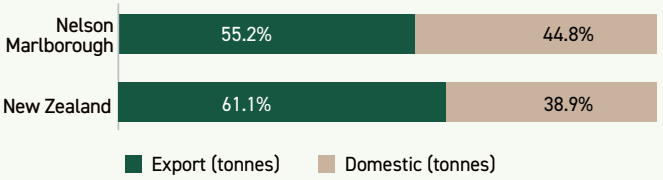
Source: WAF August 2021 - Scenario 3 - Canopy

Figure 7. Wood Availability Forecast (WAF) scenario 3 for Marlborough, in cubic metres. Source: WAF 2021.



Markets

Figure 8. Percentage of exports vs domestic processing of logs for the Nelson and Marlborough wood supply region. Source: Levy trust data for year ended December 2024.



In 2024:

- 1,678,055 tonnes of logs were exported from Nelson and Marlborough, contributing to 8.8% of the total logs exported from New Zealand.
- 1,361,448 tonnes went to sawmills in the region, contributing to 11.2% of the total log volume processed in New Zealand.
- 676,686 tonnes of logs were exported from Port Marlborough.

Forestry and wood processing supply chain

Nurseries

There is at least one major nursery producing exotic species and at least 4 nurseries in the region producing native species.

Wood processing

There are a combination of major and small wood processing plants in the region which produce sawn timber and panels. There are at least 6 other wood processors producing less than 20,000 m³ of beams, posts and poles per annum in the region.

In 2023:

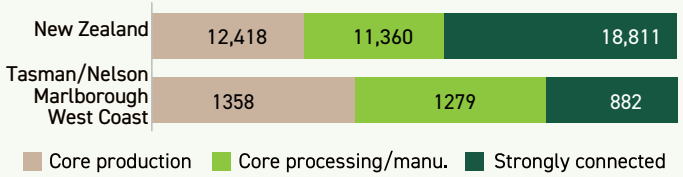
- Nelson and Marlborough produced 328,366 m³ of sawn timber. This is 9.0% of New Zealand's total sawn timber production for the period.
- Nelson and Marlborough produced 401,643 m³ of panels. This is 29.5% of New Zealand's total panels production for the period.

Source: Quarterly production statistics MPI. Statistics for calendar year 2023 (Jan-Dec). This data includes only mills that report data quarterly. Data from mills that report annually is not included.

Workforce

For the year ending March 2023, an estimated 42,589 people worked in the forestry and wood processing sectors in New Zealand and 8% (3,519) worked in the Nelson, Tasman, Marlborough and West Coast regions.

Figure 11. Comparing the numbers of workers in forestry and wood processing. Source: Forestry and wood processing – Food and fibre workforce insights



Core production	Core production includes forestry, logging and forestry support services.
Core processing/ manufacturing	Core processing/manufacturing includes log sawmilling, wood chipping, timber resawing and dressing, veneer and plywood manufacturing, reconstituted wood product manufacturing and pulp, paper and paperboard manufacturing.
Strongly connected	Strongly connected activities include wooden structural fitting and component manufacturing, other wood product manufacturing, corrugated paperboard and paperboard container manufacturing, paper bag manufacturing, wooden furniture and upholstered seat manufacturing, timber wholesaling.

New Zealand Dryland Forests Innovation

Since 2003, the New Zealand Dryland Forests Innovation (NZDFI), formerly New Zealand Dryland Forests Initiative, have been looking at the potential to grow durable eucalypts in the Marlborough region. They look at producing vineyard posts as an alternative to posts from radiata pine treated with copper chrome arsenate (CCA). The NZDFI vision involves the development of a sustainable and durable hardwood industry for New Zealand.

NZDFI offers improved eucalypt trees and forestry knowledge to growers, enabling them to choose and grow eucalypt species suited for their sites.

In July 2023, the Marlborough Research Centre (MRC) released a report showing early results of 14 demonstration trials to test 11 different eucalypt species in different New Zealand environments. The demonstration trials were implemented by NZDFI across the North Island and in Marlborough, Nelson and North Canterbury.

The species selected by NZDFI were eucalypt species with adaptability to warm and dry conditions along with timber durability, fast growth, drought, frost and pest tolerance, good nectar/pollen production for native biodiversity and bees, among others.

NZDFI focused on *E. bosistoana, E. globoidea,* and *E. quadrangulata* for the tree improvement breeding programme. Additional species were included in the trials to explore their suitability for commercial plantation use.

The report emphasised the importance of matching species to specific sites (genotype by environment interaction G x E) and end-products for successful eucalypt forestry.

Source: New Zealand Dryland Forests Innovation – Our history

Variation in adaptability and productivity between durable eucalypt species in different New Zealand environments (PDF 1.4 MB)

A regional development case study on the potential for a durable hardwood industry (PDF, 10.6 MB)

Te Hoiere Project

Since 2019, Te Hoiere/Pelorus Catchment Project, a community driven environmental restoration project, has been working to improve land resources and freshwater in the Pelorus/Te Hoiere catchment. The main actions include tree planting, pest control, fencing waterways and wetlands, and monitoring water quality, land use impacts and wildlife.

The Top of the South Wood Council (TOTSWC), a member of Te Hoiere working group, is running five forestry related research projects focused on sediment management, post-harvest riparian management, land use transition, exclusion of introduced ungulates and a toolkit and forest database for researchers and monitoring teams.

Around 75% (10,739 ha) of Marlborough's very highly erodible land is in the Pelorus/Te Hoiere River catchment. Almost 80% of this land within the catchment is public conservation land covered by indigenous forest. The rest is privately owned land covered with mānuka/kānuka and gorse and/or broom.

Erosion

Around 1.4% (14,225 ha) of the region's land is classified as very highly susceptible to erosion. 42.8% (448,205 ha) is classified as highly susceptible to erosion using the ESC (Erosion Susceptibility Classification) (See Figure 9). This is compared to 13.1% (3,472,477 ha) and 19.2% (5,083,013 ha), respectively, for New Zealand.

Government funding

One Billion Trees Programme: As of December 2023, $3.4 million in funding has been approved for direct landowner and partnership grants in the region.

A total of 1,107 hectares were planted in the region using the One Billion Trees Fund.

The One Billion Trees Fund, part of the One Billion Trees Programme, is now closed to new applications. The programme's goal is to plant a billion trees by 2028.

Progress towards planting one billion trees – MPI

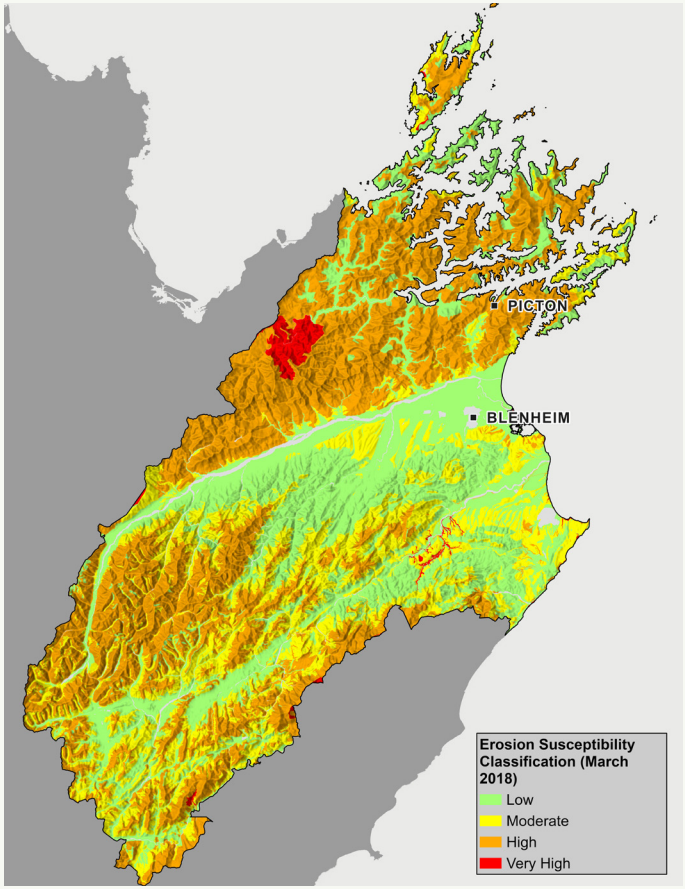
Hill Country Erosion (HCE) Programme: Since 2018, $2.2 million in funding has been approved for projects in Marlborough.

Between 2019 and 2023 alone, the HCE Programme helped protect 570 hectares of erosion-prone land in Marlborough through native (indigenous) reversion projects, exotic forestry and the strategic planting of poplar and willow trees.

The HCE Programme is a partnership between MPI, councils and landowners to support regional erosion-control projects.

Hill Country Erosion Programme for councils – MPI

Figure 9. Erosion Susceptibility Classification (ESC) for Marlborough. Source: MPI.
View a high-resolution version of the Erosion Susceptibility Classification map.



Indigenous forestry

In 2022, tōtara, silver beech and red beech were the indigenous species that had the largest volumes delivered to mills in the region.

Table 2. Log volumes in cubic metres (m^3) delivered to mills in 2022 in Nelson, Tasman and Marlborough. Source: Indigenous Forestry - MPI.

Species	m^3
hard beech	14.9
kahikatea	0.2
kānuka	0.3
mātai	7.9
mountain beech	1

Species	m^3
red beech	56.1
rimu	62.5
silver beech	57.9
tōtara	123.9

Infrastructure

Roads

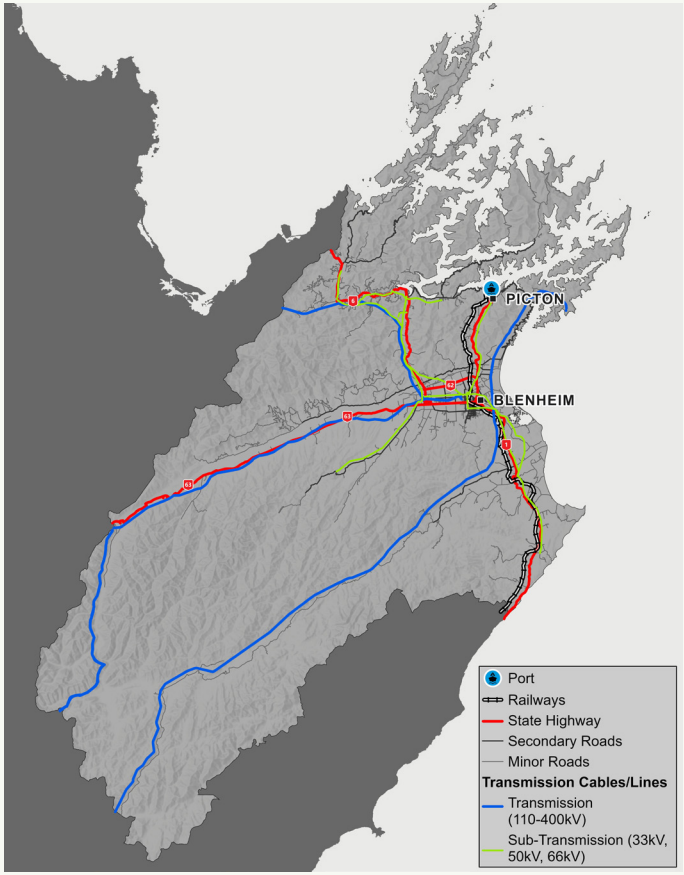
State Highway (SH) 1 connects Port Marlborough at the northeast of the region, to the east of the region and down to the Kaikōura District in the Canterbury region. SH63 connects the west side of Marlborough to the Tasman region and SH6 connects the northwest to the Nelson region.

Electricity

Transpower owns the transmission lines in the region which consists of one 110kV double circuit and one 110kV single circuit lines, one 220kV double circuit and one 220kV single circuit lines, and one 350kV double circuit line.

Figure 12. Map of key infrastructure across Marlborough.

View a high-resolution version of the infrastructure map in Marlborough.



The power lines information on this map may be incomplete. The information that is currently displayed is what MPI had authorised access to at the time of creating this fact sheet.

Power is generated in the region by Argyle (Branch River Scheme) hydroelectric (3.8 MW) and Waihopai hydroelectric (2.5 MW) operated by Manawa Energy, Weld Cone (0.8 MW) and Lulworth (1 MW) wind farms operated by Energy3, and Wairau Valley (2.2 MW) solar farm operated by Kea Energy.

The high voltage direct-current (HVDC) link is a 600-megawatt (MW), 500 kilovolt (kV) transmission line that enables the transmission of electricity between the North Island and the South Island of New Zealand. This submarine segment of the link crosses the Cook Strait from Oteranga Bay in Wellington to Fighting Bay in the Marlborough Sounds.

Port Marlborough

Port Marlborough is in Picton. It provides key services for industries across the region, including forestry, fishing, marine farming, domestic and international tourism and recreational boating.

The South Island's first in-port debarking facility became operational at the Port Marlborough during the 2024 financial year. Debarking logs eliminates the need for chemical fumigation when exporting logs to countries allowing debarked logs.

In 2024, the port handled 3.6% of the volume of New Zealand log exports and 1.6% of chips. Port Marlborough exported logs and chips worth $113,349,933 (1.9% of New Zealand total log and wood products exports). Other forestry products are not exported through the port (source: Overseas Merchandise Trade – OMT).

Rail

The rail lines in the region connect the Port in Picton to Blenheim and down the east coast to the Canterbury region.

Sources: KiwiRail, Port Marlborough, Transpower, Manawa Energy, Energy3, Kea Energy, New Zealand Transport Agency / Waka Kotahi websites.

Table 3. Port Marlborough export volumes and value (Free on Board - FOB) for forestry and wood products for the year ended December 2024. Source: Overseas Merchandise Trade

Product (SOPI)	Unit of measure	Export quantity	Quantity as % of NZ total	Export FOB ($NZ)	Value as % of NZ total
Chips	Bone dry unit	4,000	1.6%	$795,962	1.1%
Logs	Cubic metre	796,133	3.9%	$112,553,971	3.6%

Useful links

Forestry

Top of the South Wood Council

The sustainable management of indigenous forests – MPI (PDF, 3 MB)

New Zealand forest data – MPI

Afforestation and deforestation intentions survey 2023 – MPI (PDF, 943 KB)

Forestry in the Marlborough District – RemoteHQ

Land Cover Industry – Marlborough District Council

Wood processing

Invest in New Zealand wood processing (March 2020) – NZTE

Information releases - Overseas merchandise trade – Stats NZ

Regional statistics

Marlborough region 2023 Census data

Regional Economic Activity Web Tool - Marlborough – MBIE

Regional updates – NZTA

Top of the South / Te Tau Ihu – Kānoa

Infrastructure

Port Marlborough annual report 2023 (PDF, 4.9 MB)

Maps and Geospatial data – Kiwirail

Transmission lines – Transpower

Economic development

Marlborough Smart+Connected – Marlborough District Council

Feedback

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