



Current state of the forestry and wood processing industries in Te Matau A Māui/Hawke's Bay. The Hawke's Bay region on the East Coast of New Zealand, limits to the North with the Gisborne region and to the south with Manawātū-Whanganui region. It has a mild climate which is warmer than the New Zealand average. Te Uruwera, Whirinaki, Kaweka and Ruahine forests serve as a natural frontier between the region and the Bay of Plenty.

# \$12 billion

Regional GDP for year ended March 2024  
(3% of national GDP)

# \$371 million

GDP in forestry, fisheries and mining for year ended March 2023  
(3% of the GDP for the region)

# \$64,935

GDP per capita for year ended March 2024  
(national GDP per capita \$78,233)

# 175,074

Estimated regional population 2023 Census  
(3.5% of New Zealand's total)

# 708

Number of new dwelling consents for all construction in 2024  
(-13.9% change from 2023)

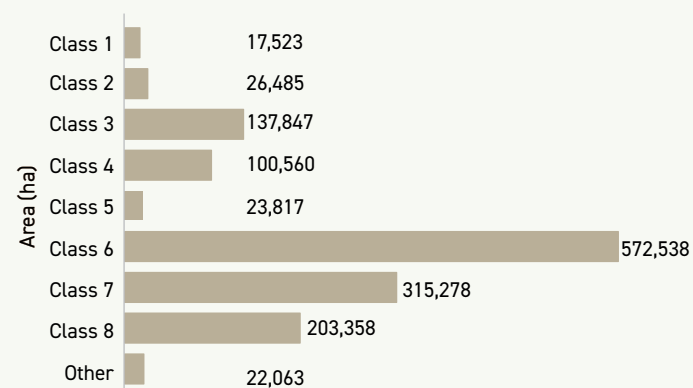
# 28.6%

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 (ha) by LUC class. Source: LUC database 2021



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.

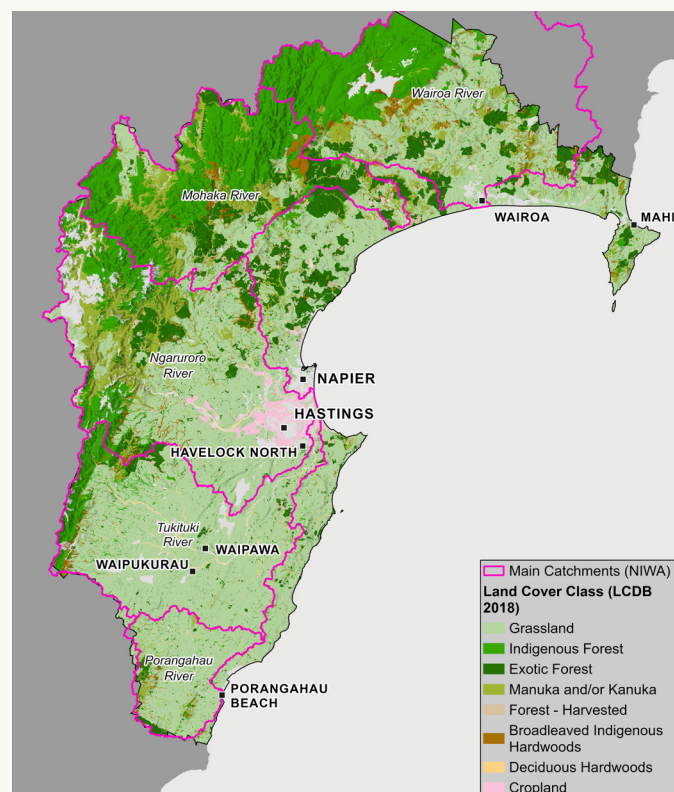
12.8% of the land area in the region is classified as Highly Productive Land (LUC 1 to 3). 40.3% of land area in the region is classified as LUC 6. 36.5% of land area in the region is classified as LUC 7 and 8.

Sources: [Our Environment - Manaaki Whenua Landcare Research](#) and [Target land and land use capability classes - MPI](#)

## Existing land cover

Figure 2. Map: Land cover in Northland. Source: [Land Cover Database \(LCDB5\) - LRIS](#)

[View a high-resolution version of the map of land cover in Hawke's Bay](#)

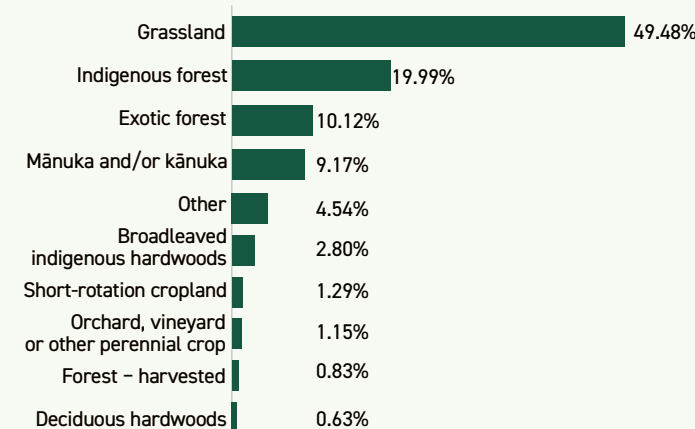


Hawke's Bay total land area is 14,139 sq km (1,413,900 ha) making up 5.37% of the total area of New Zealand. 49.48% (702,052 ha) of the region's land is covered in grassland followed by 19.99% (283,672 ha) covered by indigenous forest and 10.12% (143,219 ha) covered by exotic forest.

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 Ngaruroro River (336,051 ha), Wairoa River (262,901), Tukituki River (249,853) and Mohaka River (242,686). All the other catchments in the region are less than 4,000 ha.

Source: [Geographic boundary viewer - Stats NZ](#)

Figure 3. Percentage of different land covers in Hawke's Bay. Source: Land Cover Database (LCDB5: Land Cover Database - 2018)



## Existing forest cover using LCDB

**Exotic forest** covers 10.12% (143,619 ha) of the region's total land area.

**Deciduous hardwood** such as willows, poplars, oaks, elms and ashes, cover 0.63% (8,905 ha).

**Indigenous forest** covers 19.99% (283,672 ha) of the region's total land area.

**Mānuka and kānuka**, which can act as a nursery crop in a reversion towards forest, covers 9.17% (130,117 ha).

**Broadleaved indigenous hardwoods** such as wineberry, mahoe, Pittosporum spp, fuchsia, tutu, titoki and tree ferns, cover 0.49% (6,956 ha) of the region's land.

**Forest - harvested** includes bare ground where exotic forest was harvested or, less commonly, indigenous forest. It covers 0.8% (11,783 ha) of Hawke's Bay.

**Other** includes urban settlements, gravel, rocks, lakes, rivers, sand, among others.

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



## National Exotic Forest Description (NEFD 2024<sup>1</sup>) for Hawke's Bay

Hawke's Bay is part of the Hawke's Bay wood supply region. The wood supply regions are areas grouped by the National Exotic Forest Description. The average age of the exotic forest in the region is 15.5 years compared to 18.6 years nationally.

Figure 4. Comparing Hawke's Bay and New Zealand on key exotic forestry facts. Source: NEFD 2024

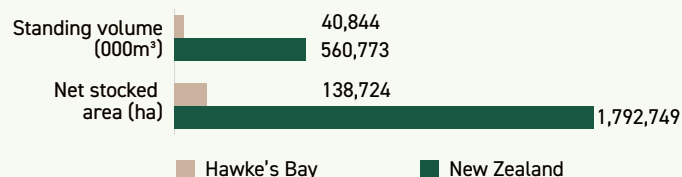
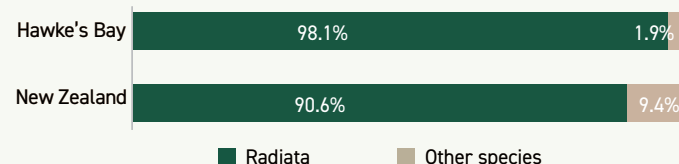


Figure 5. Proportion of exotic forest species in Hawke's Bay in comparison to New Zealand. Source: NEFD 2024

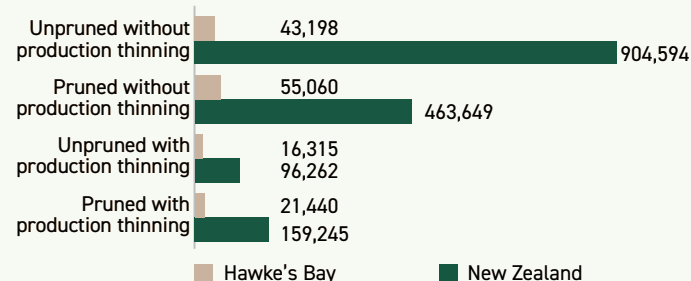


Radiata pine comprises 98.1% of the exotic pine forest in the region, compared with 90.6% New Zealand average.

16% (22,293 ha) of the total planted area of radiata pine forest in Hawke's Bay is of potentially harvestable age (age 26–30 years). Compared to 21% of the national total planted area of potentially harvestable age.

In Hawke's Bay, radiata pine comprises 98% of the exotic pine forest in the region, covering 136,012 ha. Other exotic forestry species are: 0.2% Douglas-fir (328 ha), 0.6% other softwoods such as redwoods (786 ha), 0.1% other hardwoods such as acacia and blackwood (120 ha), 0.2% cypress (298 ha), and 0.8% eucalyptus (1,154 ha).

Figure 6. Number of hectares of pruned and unpruned regimes of radiata pine in Hawke's Bay. Source: NEFD 2024



<sup>1</sup> The 2024 National Exotic Forest Description provides a detailed description of New Zealand's planted production forest.

Unpruned without production thinning is the most popular regime of the radiata forest in this region (Figure 6). This can have a significant implication on the future supply of radiata pine pruned logs (see Figure 7).

The forest area by NEFD forest owner national size class for Hawke's Bay wood supply region is:

Table 1. Forest area by National size class. Source: NEFD 2023\*

	< 40 ha	40–99 ha	100–999 ha	1,000 –9,999 ha	10,000+ ha
Area (ha)	22,088	3,203	13,580	26,507	79,514
Number of forest owners	NA	50	50	11	4

\*Ownership data in this table is based on NEFD 2023. The 2024 NEFD does not include ownership data for Hawke's Bay. Use caution when comparing this table with other NEFD sources in this factsheet as those may be based on different reference years and methodologies.

## Wood Availability Forecast (WAF)

Figure 7. Wood Availability Forecast (WAF) scenario 3 for Hawke's Bay, in cubic metres. Source: WAF 2021.

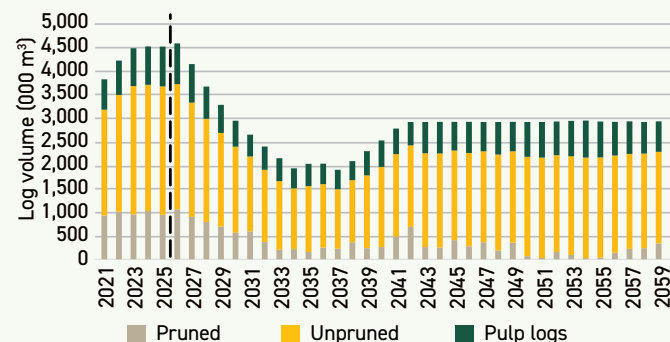


Figure 7 shows the availability of pruned, unpruned and pulp logs between 2021 and 2060, for the region. Wood availability is forecast to drop under 3 million cubic metres per annum from 2030 onwards, with 2037 being the lowest at 1.9 million cubic metres. From 2038 onwards the wood availability is forecast to be between 2.0 and 2.9 million cubic metres per year.

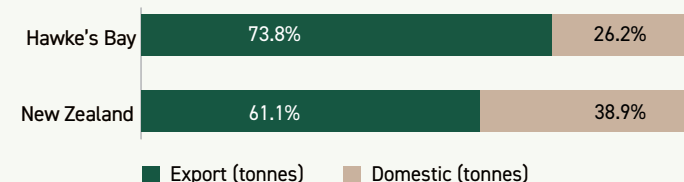
Source: WAF August 2021 - Scenario 3 - Canopy

## Markets

In 2024 :

- 2,564,640 tonnes (74%) of logs were exported from Napier Port contributing to 13% of national log exports.
- 910,043 tonnes of logs went to sawmills registered in Hawke's Bay wood supply region contributing to 7.5% of the total log volume processed domestically.

Figure 8. Percentage of exports vs domestic processing of logs for Hawke's Bay wood supply region. Source: Levy trust data 2024



## Forestry and wood processing supply chain

### Nurseries

There are at least 11 nurseries in the region producing exotic and native species.

### Wood processing

There is one major wood processing plant in the region with an output of more than 250,000 m³ per annum for sawn timber and a pulp and paper manufacturing plant. There are at least 12 other wood processors producing less than 25,000 m³ of panels and/or sawn timber per annum.

In 2023:

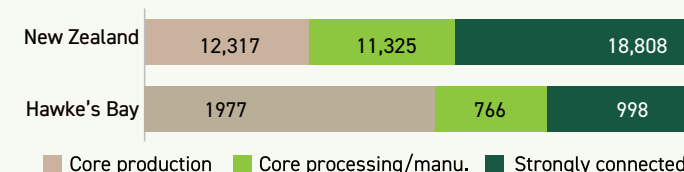
- Hawke's Bay and Tairāwhiti produced 99,038 m³ of sawn timber. This is 7.1% of New Zealand's total sawn timber production for the period.
- Hawke's Bay and Tairāwhiti produced 4,041 m³ of panels. This is 0.3% of New Zealand's total panels production for the period.
- Hawke's Bay and Tairāwhiti produced 32,366 air dry tonnes of pulp. This is 9.1% of New Zealand's total pulp 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 nearly 9% (3,741) worked in the Tairāwhiti and Hawke's Bay regions.

Figure 9. Comparing the numbers of workers in forestry and wood processing for Tairāwhiti and Hawke's Bay regions and New Zealand. 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.

### Erosion

Around 4.1% (57,485 ha) of the region's land is classified as very-highly-susceptible to erosion and 32.3% (458,866 ha) are classified as highly-susceptible to erosion using the ESC (Erosion Susceptibility Classification) (See Figure 10), compared to around 13.1% (3,472,477 ha) and 19.2% (5,083,013 ha) for New Zealand.

#### Poplar and willow poles

Poplars and willows are widely used in the region for hill country erosion control, shelter belts, livestock shade, drought fodder and timber (poplars). Hawke's Bay Regional Council's Poplar and Willow nursery was damaged by Cyclone Gabrielle. The nursery has now been refurbished and is providing a selection of poplar and willow poles for the region, although not at full capacity.

Demand for poplar and willow poles has increased after the weather events of early 2023. The regional council is exploring increasing the capacity to supply more poplar and willow poles through opening new pole nurseries in the near future, in collaboration with iwi or other councils.

#### Recovery after Cyclone Gabrielle

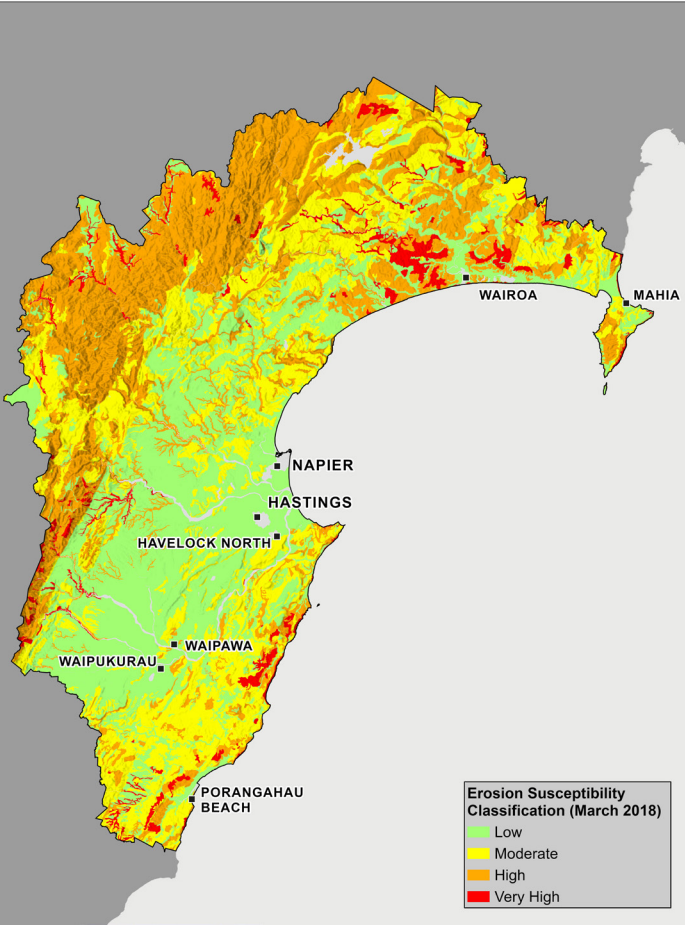
The Woody Debris Cyclone Recovery Fund (WDF), administered by Te Uru Rākau – New Zealand Forest Service, awarded Hawke's Bay Regional Council (HBRC) \$4.07 million dollars for the removal at least 40,000 tonnes of woody debris from priority catchments in the Hawke's Bay.

HBRC has focused on the cleaning of water ways including Waipawa, Tutaekuri, Aropaoanui, Wairoa, Mangaone and Upper Esk rivers, and Mangapikopiko Stream. HBRC is expected to complete their project in March 2024. As of 5th February 2024, they have recorded the removal of 55,717 tonnes of debris under the WDF.

HBRC in conjunction with Hastings District Council, established the Silt Recovery Taskforce (SRT), due to the amount of silt deposited on orchards, farms, roads, and residential properties across the region following Cyclone Gabrielle.

As of 16 January 2024, the SRT have cleaned up 1,485,000 m³ of silt with an additional 1,375,000 m³ yet to be collected. The taskforce collected silt, mixed waste, and debris, including woody debris.

Figure 10. Erosion Susceptibility Classification (ESC). Source: MPI.  
[View a high-resolution version of the Hawke's Bay Erosion Susceptibility Classification map](#)



In February 2024, additional \$40 million of funding was assigned to Hawke's Bay to continue with the removal of silt and debris in the region.

Sources: [Woody debris being removed from rivers and beaches across the region – HBRC](#), [Cyclone Gabrielle recovery: advice, support and funding – MPI](#)

### Government funding

**One Billion Trees Programme:** As of December 2023, \$10 million in funding from the One Billion Trees fund has been approved for direct landowner and partnership grants in the region.

A total of 3,016 hectares were planted in the region using the One Billion Trees fund.

The 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](#)

**Provincial Growth Fund (PGF):** as of 30 September 2023, \$175 million in funding has been approved for projects in the region.

Through this fund, the government seeks to help build a regional economy that is sustainable, inclusive and productive.

#### [The Provincial Growth Fund – Kānoa](#)

**Hill Country Erosion (HCE) Programme:** Since 2008, \$9.7 million in funding has been approved for projects in the region.

Between 2019 and 2023 alone, the HCE Programme helped protect almost 2,000 hectares of erosion-prone land in Hawke's Bay. The funding supported native (indigenous) reversion projects 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](#)

### Indigenous forestry

In 2022, mātai was the indigenous species with the highest volume delivered to mills in the region.

Table 2. Log volumes in cubic meters (m³) delivered to mills in 2022 in Hawke's Bay. Source: Indigenous Forestry - MPI.

	black maire	mātai	red beech	rimu	tōtara
m³	13	124	14	5	38

### Infrastructure

#### Roads

State Highway 2 (SH2) and State Highway 5 (SH5) connect Hawke's Bay to other regions. SH2 connects Hawke's Bay to Tairāwhiti in the north and connects with SH5 at Whirinaki, before heading south towards Napier and Hastings, and out of the region. SH5 is the main entrance to the region from the Central North Island.

State Highway 50 (SH50) connects different part of the region before connecting with SH2 in Takapau.

#### Electricity

Transpower owns the transmission lines in the region which consists of four double circuit 100kV lines and two double circuit 220kV lines. There are three substations in the region Redcliffe, Fernhill and Whakatu all located near Napier and Hastings.

Power is generated in the region by Tuai hydroelectric (60 MW), Piripaua hydroelectric (42 MW), Kaitawa hydroelectric (36 MW), Whirinaki wood cogeneration (12.8 MW), Waihi hydroelectric station (4.7 MW), Rimu hydroelectric (2.4 MW), Toronui hydroelectric (1.4 MW), Ōmarunui biogas (1MW). The power stations operator in the region are LMS Energy and





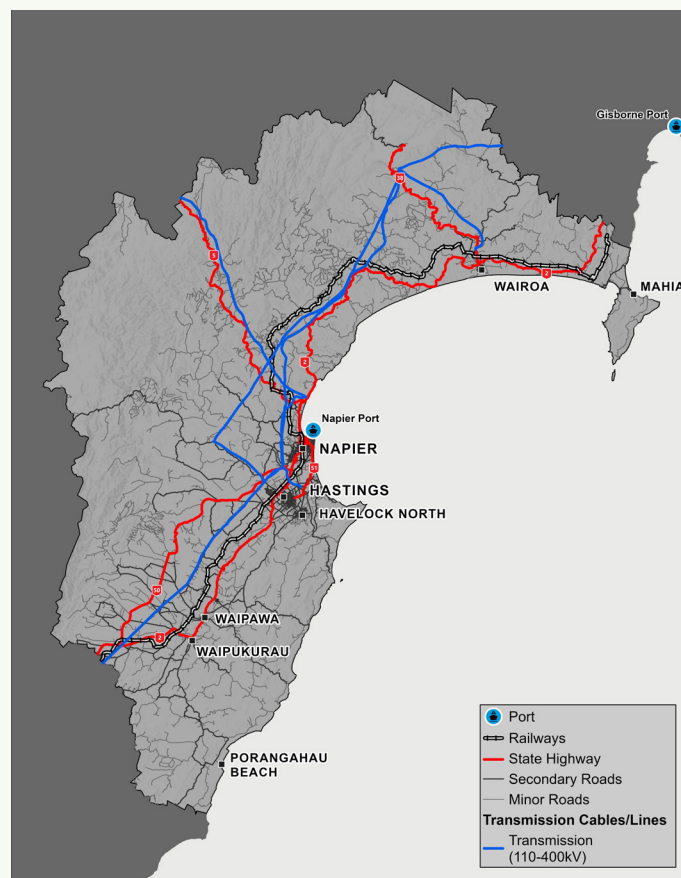
Hastings District Council, Contact Energy, Genesis and Manawa Energy.

### Napier Port (Hawke's Bay Port)

Napier Port was the second major exporter of logs and sawn timber and sleepers by volume for the year ended December 2024. In 2024 forestry exports from Napier increased by approximately 10% (\$616m to \$675m) year on year.

Figure 11. Map of key infrastructure across Hawke's Bay.

[View a high-resolution version of the map of infrastructure in Hawke's Bay.](#)



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

The port offers bulk cargo, containerised and cruise ship services.

The port offers log debarking services. Debarking logs eliminates the need for chemical fumigation for exporting logs to countries allowing debarked logs.

### Rail

Rail lines connect the region from Wairoa to Hastings, Napier and south to Palmerston North. The line between Napier and Hastings goes through the Napier Port.

The rail freight service between Palmerston North and Napier was closed in 2024 shortly after the closure of two Winstone mills in the Rangitikei region. The service was reopened in January 2025, after negotiations between Kiwirail and New Forest Forestry, benefitting road maintenance and logging operations for central and lower North Island.

As of March 2025, the line between Wairoa and Napier remains closed. This line had around one train per day carrying logs before its closure in 2023. No estimate is available on its future.

Sources: KiwiRail, Napier Port, Transpower, Contact Energy, Genesis Energy, Manawa Energy, New Zealand Transport Agency / Waka Kotahi.

Table 4. Napier Port export volumes and value (Free on Board - FOB) for forestry and wood products in 2024. Data Source: Overseas Merchandise and Trade

Product (SOPI)	Unit of measure	Export quantity	Export quantity over NZ Total	Export Free On Board (\$NZ)	Export Free On Board over NZ Total
Chips	Bone dry unit	17,200	6.8%	\$4,747,187	6.7%
Logs	Cubic metre	2,639,337	13%	\$402,007,258	12.8%
Panels	Cubic metre	4,064	0.7%	\$2,369,456	0.6%
Paper and paperboard	Mixed*	—	—	\$1,121,375	0.3%
Pulp	Tonne	216,511	33.2%	\$147,059,323	22.5%
Sawn timber and sleepers	Cubic metre	258,091	15.5%	\$109,211,037	10.7%
Other forestry products	Mixed*	—	—	\$8,232,893	4.0%
<b>Total</b>				<b>\$674,748,529</b>	<b>11.5%</b>

\*Quantities are not given as products are expressed in different units.

## Useful links

### Forestry

[New Zealand forest data – MPI](#)

[Afforestation and deforestation intentions survey 2023 – MPI \(PDF, 943 KB\)](#)

[Forestry – Hawke's Bay Regional Council](#)

### Wood processing

[Invest in New Zealand wood processing \(March 2020\) – NZTE](#)

[Wood Supply and timber processing options in the Hawke's Bay – NZIF](#)

### Regional statistics

[Hawkes Bay region 2023 Census data – Stats NZ](#)

[Regional Economic Activity Web Tool - Hawke's Bay – MBIE](#)

[Hawke's Bay – NZTA](#)

[Hawke's Bay / Te Matau-a-Māui – Kānoa](#)

[Matariki Hawke's Bay Regional Development Strategy – HBRC](#)

[Hawke's Bay Long Term Plan 2021-2031 – HBRC \(PDF, 10.9MB\)](#)

## Feedback

Contact email: [info@mpi.govt.nz](mailto:info@mpi.govt.nz)

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