



## Food & Beverage Sector Survey: Environmental Export-related Requirements

### What is the purpose of the survey?

Landcare Research, with support from New Zealand Trade and Enterprise (NZTE), is undertaking a survey to determine the environmental hurdles New Zealand producers and exporters currently face in overseas markets. The survey is intended for companies involved in all export activities in the food and beverage sector, from producers and manufacturers through to exporters. The findings of the survey will be made available to those who wish to maintain and improve the competitiveness of the food and beverage sector in export markets.

### Why are social and environmental practices important for food export?

Consumers increasingly demand food products that meet stringent environmental requirements. Such requirements can be broadly grouped in product or process measures that aim to avoid or mitigate impacts on human health and safety, and on species or ecosystems, that may result from the process of food production and consumption (including refrigeration and transport to the markets). To protect consumers, governments have put in place complex food health and safety regulations and standards. Large food manufacturers and retailers have also introduced stringent environmental requirements to their supply chain. While such requirements are not mandatory, they often become *de facto* criteria for market access if many importers and retailers require them. Current trends have demonstrated the increasing importance of voluntary environmental requirements in the market place, especially when such requirements are adopted by global supply chains. As a sector with a high level of consolidation, food and beverage is particularly sensitive to such developments. Building the capacity of producers and exporters to anticipate and respond to future environmental requirements is an important step to enhance their competitiveness and protect their market share.

### How long is the survey and what is it about?

The survey takes about **20 to 30 minutes** to complete and is divided into three sections:

- 1) *Company profile*: to learn about your company
- 2) *Environmental profile*: to learn about how you manage your company, i.e. your company's environmental management practices and credentials
- 3) *Sustainability-needs profile*: to obtain your views on what actions could help build the capacity to improve exporters' environmental performance.

### What will happen to the information you provide?

Responses received will be integrated into a report and communicated as statistics or trends so that confidential information about individuals and organisations cannot be identified. Should we wish to use your company as an example of good practice or as a case study, we will ask your permission, request more information, and give you the opportunity to check the text for factual accuracy before publication.

### Where to send the completed form

Please return the completed survey to Cerasela Stancu, email [stancuc@landcareresearch.co.nz](mailto:stancuc@landcareresearch.co.nz) or by post to Landcare Research, Private Bag 92170, Auckland.

### Win a case of wine

Each completed survey we receive will go into a draw for a case of wine! There will be a winner for each 75 responses received.

**Thank you for your time.**



**COMPANY PROFILE**

1. Business name

2. Location/Address

3. Contact name

4. Designation/position

5. Phone, e-mail, www

6. Industry association membership. Please specify:

7. Which area of activity best fits your company? Select **ALL** that are relevant

- |   |   |
|---|---|
| <input type="checkbox"/> Meat and meat product manufacturing        | <input type="checkbox"/> Bakery/confectionary                       |
| <input type="checkbox"/> Dairy and dairy product manufacturing      | <input type="checkbox"/> Seafood and seafood product processing     |
| <input type="checkbox"/> Fruit and vegetable growing and processing | <input type="checkbox"/> Beverage (soft drinks, beer, wine, spirit) |
| <input type="checkbox"/> Oil and fat manufacturing                  | <input type="checkbox"/> Import-export company                      |
| <input type="checkbox"/> Flour mill and cereal food manufacturing   | <input type="checkbox"/> Sales/marketing                            |
|   | <input type="checkbox"/> Shipping company                           |
|   | <input type="checkbox"/> Others? Please specify:                    |

8. How many staff (FTE) does your company employ?

- |                                |                                  |
|--------------------------------|----------------------------------|
| <input type="checkbox"/> 1–5   | <input type="checkbox"/> 50–99   |
| <input type="checkbox"/> 6–9   | <input type="checkbox"/> 100–499 |
| <input type="checkbox"/> 10–19 | <input type="checkbox"/> > 500   |
| <input type="checkbox"/> 20–49 |                                  |

9. What is your company's turnover income in the last financial year?

- |  |  |
|--|--|
| <input type="checkbox"/> <150,000            | <input type="checkbox"/> 2,000,000–3,000,000 |
| <input type="checkbox"/> 150,000–500,000     | <input type="checkbox"/> 3,000,000–4,000,000 |
| <input type="checkbox"/> 500,000–1,000,000   | <input type="checkbox"/> 4,000,000–5,000,000 |
| <input type="checkbox"/> 1,000,000–2,000,000 | <input type="checkbox"/> >5,000,000          |

10. What market(s) do you currently export to? Please specify the country(s):

11. Does your company ship products to overseas markets by air freight or sea freight? If you use both means, please specify the percentage.

- |                                      |                                      |
|--------------------------------------|--------------------------------------|
| <input type="checkbox"/> Air freight | <input type="checkbox"/> Sea Freight |
| %                                    | %                                    |



## ENVIRONMENTAL PROFILE

12. In your export market(s), what are the main requirements you face? Select **ALL** that apply and provide details for each item selected:

- Environmental criteria set by customer. Please specify:
- Supplier questionnaires set by customer. Please specify:
- Supplier audits undertaken by customer.
- Mandatory standards or certification. Please specify:
- Voluntary standards or certification (such as an environmental management system). Please specify:
- Mandatory labelling. Please specify:
- Voluntary labelling voluntary (such as eco-labelling). Please specify:
- Packaging specifications. Please specify:
- Take-back obligations
- Other? Please specify:

13. Does your company have measures addressing any of these issues? Select **ALL** that apply and briefly describe the measure for the issues selected:

- Energy conservation and/or efficiency. Please specify:
- Emissions management (measurement/reduction/offsetting). Please specify:
- Pollution prevention. Please specify:
- Transport and fuel use. Please specify:
- Use of air freight. Please specify:
- Water conservation or efficiency. Please specify:
- Waste reduction or waste minimisation. Please specify:
- Biodiversity or habitat protection. Please specify:
- Other? Please specify:

14. Does your company have any of the following? Select **ALL** that apply

- An environmental policy
- A director with environmental responsibilities
- A dedicated environmental manager
- Staff environmental awareness, training, education programme(s)
- Objectives and targets for improving environmental performance
- A certified environmental management system. If yes, please specify which system:
- Environmental criteria in procurement policy or procedures
- Measures/procedures to ensure compliance with environmental regulations in NZ
- Measures/procedures to ensure compliance with environmental requirements from overseas market
- Products or services with environmental credentials. Please specify:
- Environmental criteria for company's investment (e.g., for pension funds)
- An annual environmental report
- Environmental achievements included in marketing
- Other? Please specify:



15. Has your company joined any of these sustainable business groups or initiatives in New Zealand? Select **ALL** that apply

- Green Fleet
- New Zealand Business Council for Sustainable Development
- NZ Packaging Accord
- Sustainable Business Network
- The Natural Step
- Other? Please specify:

16. Large companies only – Is your company listed by any of these schemes? Select **ALL** that apply

- Advanced Sustainable Performance Index
- Dow Jones Sustainability Index
- Ethical Trading Initiative
- FTSE4Good
- Global Compact
- Global Reporting Initiative
- Marine Stewardship Council (MSC)
- Reputex
- Other? Please specify:

17. Does your company have a quality or environmental management system in place? Select **ALL** that apply

- Enviro-Mark®NZ
- ISO 9001 (or others in the ISO 9000 series)
- ISO 14001 (or others in the ISO 14000 series)
- Other? Please specify:

18. Have you joined any specific standards or codes of practice for your sector or supply chain? Select **ALL** that apply

New Zealand:

- AvoGreen®
- FarmSure
- Fonterra Dairying and Clean Streams Accord
- HortNZ Fresh Produce Assured Supplier Programme
- Integrated Fruit Production (TrustMark)
- Integrated Greenhouse Management
- SummerGreen (summer fruit)
- ZESPRI™
- Other? Please specify:

Overseas:

- EurepGAP
- Global Food Safety Initiative
- Linking Environment and Farming (LEAF)
- Sustainable Agriculture Initiative Platform
- Supply chain code of practice/conduct (e.g. Sainsbury's socially responsible sourcing; Tesco's Nature's Choice; Marks and Spencer's Global Sourcing Principles)
- US National Organic Program
- Other? Please specify:



19. Are you certified to carry any of these labels on your products/materials/services? Select **ALL** that apply

Available in NZ:

- CarboNZero®
- Environmental Choice
- Green Tick
- Marine Stewardship Council (MSC)
- Organic certification, e.g., Demeter, BioGro, AgriQuality, OrganicFarmNZ
- Recycling mark for packaging
- Sustainable Winegrowing New Zealand
- Other? Please specify:

Available overseas\*:

- Agriculture Biologique (AB)
- Australian Certified Organic
- Bio-Suisse
- Bio-siegel; Naturland, Bioland
- EU Organic Farming label
- Grüner Punkt
- JAS
- KRAV
- Soil Association Organic Standard
- USDA Organic
- Other? Please specify:

20. Are you aware of any other environmental or sustainability codes of practice or guidelines for your sector (NZ or overseas)? Please specify:

21. Have you carried out any life cycle analyses for your products? If yes, please describe the reason for undertaking such analysis:

22. Where your company has implemented environmental initiatives, what were the main reasons for these initiatives (i.e. compliance with NZ/overseas regulations, export market trends, consumer expectations, supply chain requirement, etc). Please specify:

23. How severely do you think your company's overall activities and products impact on the environment? Select **ONE**

- No impact
- Minor impact
- Major impact
- Severe impact
- Detrimental

24. How would you rate the current environmental management practices of your company? Select **ONE**

- Very poor
- Poor
- Fair
- Good
- Excellent



**SUSTAINABILITY NEEDS PROFILE**

25. In your opinion, and given New Zealand conditions, what are the most important issues facing the food and beverage sector? Select the **THREE** most important issues and rank them (1 most important, 2 second choice, 3 third choice):

- |  |                        |
|--|------------------------|
| Animal welfare                             | conversion)            |
| Biodiversity and habitat protection        | Nutrition and obesity  |
| Chemical (fertilisers, pesticides) impacts | Organic agriculture    |
| Climate change/emissions                   | Pesticides residues    |
| Distance to export market                  | Refrigeration          |
| Fair trade                                 | Soil protection        |
| Food safety                                | Transportation impacts |
| GMOs                                       | Waste management       |
| Integrated pest management                 | Water quality          |
| Land use patterns (e.g., dairy             | Worker welfare         |
|  | Other? Please specify: |

26. What are the most important consumer trends in your export markets? Select the **THREE** most important trends and rank them (1 – most important, 2 – second choice, 3 – third choice):

- |                            |                        |
|----------------------------|------------------------|
| Convenience                | Food traceability      |
| Consumer health and safety | Healthy food           |
| Ethnic and exotics         | Organic food           |
| Environmental issues       | Other? Please specify: |

27. What consumer risk(s) or concern(s) are associated with your product area in New Zealand and/or export market? Please describe them:

28. What are your main sources of information or where do you seek advice to improve your social and environmental management practices? Select **ALL** that apply

- Colleagues
- Customers/clients
- Retailers/supply chains
- Competitors
- Government agency/regulator. Please specify:
- Industry association/sector/professional body. Please specify:
- Personal research, e.g., websites, journals, magazines
- Educational bodies, e.g., universities, training organisations. Please specify:
- Research organisations. Please specify:
- Other? Please specify:



29. What obstacles has your company encountered in adopting good environmental practices? Select **ALL** that apply

- Differing market requirements
- Lack of information about environmental requirements and labels popular in export market
- High cost of shifting to more sustainable production practices
- High cost of (eco)certification
- Fast rate of change in overseas environmental requirements
- Uncertainty about the effectiveness of New Zealand eco-labels in overseas export markets
- Lack of reliable information about the premiums for eco-labeled products in export markets
- Other? Please specify:

30. What factors would most stimulate the adoption of more sustainable practices in food and beverage sector? Select the **THREE** most important factors and rank them (1 – most important, 2 – second choice, 3 – third choice):

- Dissemination of standard-related information from export markets
- Early warning system to alert you about environmental requirements
- Evidence about new trends in environmental management requirements and their market implications
- Adoption of sustainable practices by competitors
- Environmental management guidance incorporated in export training programmes
- Supply chain initiatives (assistance to meet requirements and set standards)
- Other? Please specify:

31. Which company or organisation does your company consider to be the sustainability leader for your sector? Please specify:

32. In your opinion, what are the most **THREE** important issues that need to be addressed to retain and strengthen the 'clean and green' New Zealand brand? Please list them.

- 1.
- 2.
- 3.

33. Please provide any further comments that you wish to make about the NZ food and beverage sector and environmental/sustainability challenges.

34. Please tick the box if your company is willing to participate in developing a best practice case study.

35. Please tick the box if you would like to receive any future information about environmental and sustainability requirements in export markets.