Land-use change from pastoral farming to large-scale forestry Update

September 2024

Orme & Associates Limited

Client Report

Update of land-use change from pastoral farming to large-scale forestry for 1/01/2022 – 30/06/2024

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Client Details	Beef + Lamb New Zealand Ltd

Disclaimer

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Executive Summary

Orme & Associates has been commissioned by Beef + Lamb New Zealand to:

REVIEW AND UPDATE the Land Use change on Pastoral Farms report to 30/06/2024.

Our previous report on sheep and beef farm sales into forestry was published in August 2023 and covered the period 2017 to the end of 2022.

B+LNZ commissioned Orme & Associates to update the number of farms that had been sold since then.

Since our previous report, a further 51,291 ha, identified as intended for afforestation, have been finalised.

This takes the total amount of sheep and beef land that has been purchased for conversion into forestry to 261,733 ha between 2017 and 30 June 2024. In 2022 and 2023 the proportion of farms (by %) purchased by traditional carbon entities had increased to about half in 2022 and over 33% in 2023.

Whole of Farm Purchase	Year					Updated 2022	New 2023	New 2024 (Qtr1&2)	Grand Total (Hectares)	Overall % by Conversion
	2017	2018	2019	2020	2021					
Honey (Mānuka)	3,039	7,340	1,678	3,313	3,175	876			19,421	7.4%
Forestry	2,510	11,245	26,198	6,069	16,266	7,855	6,309	1,676	78,128	29.9%
Carbon Forestry				13,635	16,029	31,686	5,461	2,940	69,750	26.6%
Forestry OIO	1,455	8,982	10,626	15,261	28,112	23,540	5,868	589	94,434	36.1%
Total Whole of Farm	7,004	27,567	38,502	38,278	63,582	63,956	17,638	5,205	261,733	100.0%
Previous Report 2022	7,004	27,567	38,502	38,278	63,582	35,508	-			

The numbers are based on an analysis of the purchaser for all farm sales, confirmed at the time, over 250 ha. Only if a farm is clearly brought by a recognised forestry or traditional carbon operator, or driven past and trees seen established, is it counted. The analysis relates to these properties. There are examples of blocks purchased that are smaller than 250 ha for afforestation, and these, along with the conversion of land within farms, is not reflected in the analysis.

Confirmed sales for the 2022 year have been significantly revised upwards since our last report (due to major delays in the final sales being reported) from 35,508 ha to 63,956 ha, as the backlog of OIO applications and conditions within S&P agreements entered into during this period have settled.

Our results for the 2023 year and the first two quarters of 2024 are still preliminary.

We expect that both may end up being higher than in this current report, due to a continuation of delays in the finalisation of farm sales, however, there has appeared to have been a slowdown in activity in 2023 and 2024, and the final numbers are anticipated to be much lower than seen in the period 2019-2022.

This reduction appears linked to on-going policy uncertainty about the future role of forestry in the ETS and whether any restrictions may be placed on farm conversions being able to be entered into the ETS.

Despite this uncertainty, the number of whole farms (ha) purchased for afforestation in 2023 is higher than those identified in 2017.

The predominant land-classes that are being sold into forestry conversion from 2017-2023, are Land Class 6 (57.2%) and Land Class 7 (29.4%), with slight reductions (on average) of Class 3 and 4 land being noticed in the properties identified in 2023 sales.

LUC Layer	Land Use Classification (LUC) Band								Grand Total (Hectares)
	2	3	4	5	6	7	8	Other	
% 2023	0.0%	2.4%	5.2%	0.5%	57.5%	32.6%	1.7%	0.0%	100%
% 2021-2022	0.2%	3.7%	6.7%	0.5%	57.8%	30.1%	1.0%	0.0%	100%
% 2020-2022	0.2%	3.8%	8.7%	2.8%	60.5%	23.3%	0.7%	0.0%	100%
% 2017-2020	0.1%	3.1%	5.4%	0.9%	52.0%	36.7%	1.7%	0.1%	100%
% 2017-2023 Weighted Average	0.2%	3.5%	7.0%	1.5%	57.2%	29.4%	1.1%	0.0%	100%

Low and Moderate erosion prone land remain more than 60% of farmland sales.

However, there has been a decrease in the Very High category Erosion Susceptibility Classification (ESC) land purchased in 2023, potentially as a result of severe weather events experienced, highlighting issues with land use on historically vulnerable land.

NB: Volumes for 2023 are reasonably low, so individual property characteristics will have a greater impact on the percentages.

ESC Layer	Erosion Susceptability Class (ESC)					Grand Total (Hectares)
	Low	Moderate	High	Very High	Other	
% 2023	27.5%	35.7%	32.7%	4.1%	0.0%	100%
% 2021-2022	29.2%	41.3%	20.4%	9.1%	0.0%	100%
% 2020-2022	38.5%	40.1%	15.1%	6.2%	0.0%	100%
% 2017-2020	28.2%	35.8%	26.0%	9.9%	0.0%	100%
% 2017-2023 Weighted Average	32.5%	38.9%	20.8%	7.8%	0.0%	100%

In the last year we have seen a change in the parts of the country where land is being sold. There has been a significant slowdown in the Gisborne region due to the environmental impacts of Cyclone Gabrielle and the conversation happening in that region about the future of land use.

The North Island by far remains the main area where farm sales into forestry are happening, with an increase in Taranaki and Waikato. (see appendix for Land District map)

Overall, in the 2023 sales, there was a decrease in the percentage of High and Low Producing Grassland, and properties with areas of natural and planted forest already in place (both pre-1990 and post-1989) have increased.

LUCAS 2016 Layer	Cropland - Annual	Grassland - High producing	Grassland - Low producing	Grassland - With woody biomass	Natural Forest	Planted Forest - Pre 1990	Post-1989 Forest	Other	Settlements or built-up area	Wetland - Open water	Wetland - Vegetated non forest	Grand Total
% 2023	0.0%	30.5%	30.7%	4.1%	18.2%	4.5%	11.8%	0.1%	0.0%	0.1%	0.1%	100%
% 2021-2022	0.0%	34.9%	40.4%	5.7%	9.0%	2.1%	7.8%	0.0%	0.0%	0.1%	0.0%	100%
% 2020-2022	0.0%	31.7%	40.9%	7.4%	11.6%	2.5%	5.8%	0.0%	0.0%	0.1%	0.1%	100%
% 2017-2020	0.0%	24.2%	41.2%	6.7%	16.1%	2.5%	8.9%	0.0%	0.0%	0.1%	0.0%	100%
% 2017-2023 Weighted Average	0.0%	30.3%	40.2%	6.6%	12.7%	2.5%	7.6%	0.0%	0.0%	0.1%	0.1%	100%

There is still strong interest and commitment from farmers and landowners considering within-farm plantings, to diversify their income options and Greenhouse Gas (GHG) obligations.

Landowners throughout the country are, where suitable, establishing trees, with a preference for natives and slower growing exotic species, to help support their business, especially in the less productive areas of their properties, that will not suit Production Forestry, due to real environmental and cost concerns around road construction and land stabilisation when/if harvested.

Radiata pine will still play an important role, on this smaller scale, especially in areas with weed infestation.

Recent changes to the ETS relating to applying an annual charge per hectare per year of forestry entered into the ETS, is making planting indigenous forestry even less attractive, because it has a lower sequestration rate.

Background

Orme & Associates was originally commissioned by Beef + Lamb New Zealand to:

"Update and track the amount of land that has been or will be planted into exotic plantation species in the near future that is likely to take land out of pastoral production".

A refresh was requested for the updated 2022 and new 2023/2024 data.

As in previous reports, a review back to the beginning of the previous year (2022) was conducted to ensure all sales were identified where settlement was potentially deferred for a variety of reasons (conditional contracts and/or subject to OIO approval).

Tables identify trends in percentage of land classes rather than total hectares, to help reflect the type of land being traded.

To provide a benchmark for 'whole of farm' purchase we analysed all sales of 250 ha or more to be consistent with the process of the original report. We are however starting to see parcels of land in the 150–250 hectare range also being traded and planted. These numbers are not represented in this report.

Land Sales Finalised Since our Last Report

758 rural properties classified as Pastoral and/or Forestry were identified as transferring to a different owner/entity during the period 1/01/2022 to 30/06/2024.

Of these 140 (18%) met the criteria for inclusion in the report as potentially being available to convert from pastoral to afforestation, compared to 22% recorded in the previous report.

It should be noted that this breaks down as follows:

24% (93/394) of the properties sold in 2022 were identified as being destined for afforestation, which decreased to 13% (36/273) of properties sold in 2023 and 14% (11/79) of properties sold so far in 2024 (5.8% by area).

NB: An additional OIO decision on 20/06/2024 has approved a cyclone damaged property in Hawke's Bay for sale as conversion to forestry of 1,053 ha on top of this table, however, yet to show up as a confirmed sale.

Change in the 2022 Figures

The updated quarterly results for the two-year period 1/01/2022 to 31/12/2023 have seen an increase in the 2022 sales finalised from our last report from 35,509 ha to 63,956 ha, as the backlog of OIO applications and conditions within S&P agreements entered into during this period have settled.

Whole of Farm Purchase	2022				2022 Total	2023				2023 Total	2024		2024 Total	Grand Total
	Qtr1	Qtr2	Qtr3	Qtr4		Qtr1	Qtr2	Qtr3	Qtr4		Qtr1	Qtr2		
Honey (Mānuka)				876	876									876
Forestry	767	3,861	558	2,668	7,855	4,431	702	327	849	6,309		1,676	1,676	15,839
Carbon Forestry	8,212	3,087	8,219	12,167	31,686	2,421	2,017		1,022	5,461	1,759	1,182	2,940	40,087
Forestry OIO	3,638	10,734	5,805	3,362	23,540	1,061	3,147	1,660		5,868		589	589	29,997
Grand Total	12,617	17,683	14,582	19,073	63,956	7,913	5,867	1,987	1,871	17,638	1,759	3,446	5,205	86,799
Previous reported Qtr areas	13,262	11,365	6,111	4,771	35,509									

Table 1: Updated data for sales by quarter from 1/01/2022 to 30/06/2024

This shows as a correction in the reviewed data, with a surge, as seen in other years, of sales entered into in the last two quarters of the year, but not finalised for a variety of reasons.

Additional conditional clauses e.g. subject to resource consent and/or OIO approval, appeared to have been included, delaying actual settlement of the S&P contracts, until these were resolved.

The number of <u>OIO</u> approved properties have increased in 2022 from 12,833 ha to 23,540 ha since our last report, as properties have settled.

NB: The criteria for approval of OIO purchasers appears, on the surface, to have tightened with a heavier weighting appearing to be applied to the LUC involved, declining applications with higher percentages of class 3 and 4 land.

This process has since sped up and it is interesting to note that the criteria for assessing full farm conversions appear to have changed slightly, with emphasis on LUC involved appearing to be considered.

Carbon Forestry purchases have increased in 2022 from 11,810 ha to 31,686 ha since our last report, as conditions within S&P agreements have settled.

<u>Honey</u> purchasers have again, appeared to have dropped significantly (2 properties identified), as returns in this industry cannot keep pace with forestry.

Whole of Farm Purchase	Year					Updated 2022	New 2023	New 2024 (Qtr1&2)	Grand Total (Hectares)	Overall % by Conversion
	2017	2018	2019	2020	2021					
Honey (Mānuka)	3,039	7,340	1,678	3,313	3,175	876			19,421	7.4%
Forestry	2,510	11,245	26,198	6,069	16,266	7,855	6,309	1,676	78,128	29.9%
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Forestry OIO	1,455	8,982	10,626	15,261	28,112	23,540	5,868	589	94,434	36.1%
Total Whole of Farm	7,004	27,567	38,502	38,278	63,582	63,956	17,638	5,205	261,733	100.0%
Previous Report 2022	7,004	27,567	38,502	38,278	63,582	35,508	-			

Table 2: Updated data for whole farms and partial farm new planting areas from 2017 to 30/06/2024

Total Change in Land Sales covering the period 2022 – 2024

The results of our review estimate:

1. The gross land area of whole farms purchased in the period 1/01/2022 to 30/06/2024 for planting is estimated at **86,799** ha.

2. Approximately **876** ha gross land area is identified for Honey operations, a significant drop on previous years.

3. Approximately **40,087** ha gross land area is identified as purchased by a likely Traditional Carbon Entity.

4. Approximately **29,997** ha gross land area is identified through the OIO process which must be planted with a limited rotation age (to ensure they are harvested – and are not carbon only) and managed as a commercial harvestable forest.

5. The balance of **15,839** ha gross land area is assumed to be from domestic purchasers interested in both production forestry and carbon options.

6. The data was based on sales that could be verified as settled, during the stated period.

NB. May be 1 hectare variation in totals due to different data/tables/layers.

Area of farms converted for harvest forest by region from 2017 - 2024

The table below records the updated sales for the various reported periods. NB. Low numbers for the year to date 2024 sales may distort the final trend (11 sales).

The Gisborne Region, which saw an increase in sales prior to the beginning of 2023, appears to have stopped completely from the data analysed, as environmental constraints have become apparent post-cyclone, and a move to reset the forestry narrative and future, in the area is developed.

Region	Land sale percentage by region				
	2017-2020	2020-2021	2021-2022	2023	1/01/2024 - 30/06/2024
North Auckland	4%	6%	6%	11%	6%
South Auckland	4%	10%	12%	19%	48%
Hawkes Bay	10%	13%	7%	8%	11%
Gisborne	4%	6%	20%	0%	0%
Taranaki	4%	6%	9%	24%	0%
Wellington	46%	27%	25%	25%	11%
Marlborough	6%	2%	4%	0%	0%
Nelson	2%	1%	0%	0%	0%
Canterbury	4%	4%	3%	3%	0%
Otago	16%	20%	8%	1%	9%
Southland	1%	5%	6%	9%	15%
Grand Total	100%	100%	100%	100%	100%

Table 3: Land sale by district data from 2017 to 30/06/2024 with map of regions (based off the Land District Map (ESC and LUCAS comparisons))

Land Type Affected from 2017 to 2024

The LUC and ESC systems are both now well established as descriptors of topography and erosion susceptibility and are used extensively to regulate and guide land use. They also inevitably influence the perceived and actual value of land on the open market.

Some of the country's best forest growth rates are seen on steep to very steep land in areas of moderate to high erodibility in the eastern North Island, they also attract some of the higher harvesting and associated roading costs.

The environmental consequences of harvesting on this land and recent intense climatic events, are generating questions and heated discussion, on suitable land use for large areas of the east coast north of Gisborne and the current harvesting methods.

It is generally agreed that some form of vegetation is required, however, there is discussion around whether production forestry, with large harvesting coups is the right management practice. Is there a need for a species/system change, and if so, will this be region specific or a national approach?

Areas of land being converted to forestry by LUC Class

The option mentioned in the Government's draft emissions reduction plan is to place a three-year moratorium on converting the most productive classes (land use classes 1-5) of farmland to forestry, and restricting conversions on land class 6 to 15,000 hectares per year. There would be no limit on converting land class 7 into pine forest, the least productive category for food growing. Farmers would be able to convert up to 25% of their farm into forestry with no restrictions on the land class.

The inability of the Government to articulate how this might be applied, is seriously undermining potential forest/vegetation plantings, not only on a larger scale , but also within farm plantings.

Land Use Capability (LUC) Classification summary

Class 6 and 7 land as a percentage is holding, with slight reductions (on average) of Class 3 and 4 land being noticed in the properties identified in 2023 sales, compared to the 6-year averages.

LUC Layer	Land Use Classification (LUC) Band								Grand Total (Hectares)
	2	3	4	5	6	7	8	Other	
% 2023	0.0%	2.4%	5.2%	0.5%	57.5%	32.6%	1.7%	0.0%	100%
% 2021-2022	0.2%	3.7%	6.7%	0.5%	57.8%	30.1%	1.0%	0.0%	100%
% 2020-2022	0.2%	3.8%	8.7%	2.8%	60.5%	23.3%	0.7%	0.0%	100%
% 2017-2020	0.1%	3.1%	5.4%	0.9%	52.0%	36.7%	1.7%	0.1%	100%
% 2017-2023 Weighted Average	0.2%	3.5%	7.0%	1.5%	57.2%	29.4%	1.1%	0.0%	100%

Table 4: Percentage of land being converted to forestry by LUC

Erosion Susceptibility Classification (ESC) summary

A decrease in the Very High category ESC land purchased, potentially as a result of severe weather events experienced, highlighting issues with land use on historically vulnerable land, has been noted. This coincides with the withdrawal from the Gisborne area.

NB: Volumes for 2023 are reasonably low so, individual property characteristics will have a greater impact on the percentages:

ESC Layer	Erosion Susceptability Class (ESC)					Grand Total (Hectares)
	Low	Moderate	High	Very High	Other	
% 2023	27.5%	35.7%	32.7%	4.1%	0.0%	100%
% 2021-2022	29.2%	41.3%	20.4%	9.1%	0.0%	100%
% 2020-2022	38.5%	40.1%	15.1%	6.2%	0.0%	100%
% 2017-2020	28.2%	35.8%	26.0%	9.9%	0.0%	100%
% 2017-2023 Weighted Average	32.5%	38.9%	20.8%	7.8%	0.0%	100%

Table 5: Percentage of land being converted to forestry by ESC

LUCAS layer summary

Overall, in the 2023 sales, a slight decrease in the percentage of High and Low Producing grassland, however properties with areas of natural and planted forest already in place (both pre-1990 and post-1989) have increased.

LUCAS 2016 Layer	Cropland - Annual	Grassland - High producing	Grassland - Low producing	Grassland - With woody biomass	Natural Forest	Planted Forest - Pre 1990	Post-1989 Forest	Other	Settlements or built-up area	Wetland - Open water	Wetland - Vegetated non forest	Grand Total
% 2023	0.0%	30.5%	30.7%	4.1%	18.2%	4.5%	11.8%	0.1%	0.0%	0.1%	0.1%	100%
% 2021-2022	0.0%	34.9%	40.4%	5.7%	9.0%	2.1%	7.8%	0.0%	0.0%	0.1%	0.0%	100%
% 2020-2022	0.0%	31.7%	40.9%	7.4%	11.6%	2.5%	5.8%	0.0%	0.0%	0.1%	0.1%	100%
% 2017-2020	0.0%	24.2%	41.2%	6.7%	16.1%	2.5%	8.9%	0.0%	0.0%	0.1%	0.0%	100%
% 2017-2023 Weighted Average	0.0%	30.3%	40.2%	6.6%	12.7%	2.5%	7.6%	0.0%	0.0%	0.1%	0.1%	100%

Table 6: Percentage of land being converted to forestry by LUCAS layer

Carbon Market

Recent NZ ETS Auctions have not achieved the desired income stream that the Government may have been expecting.
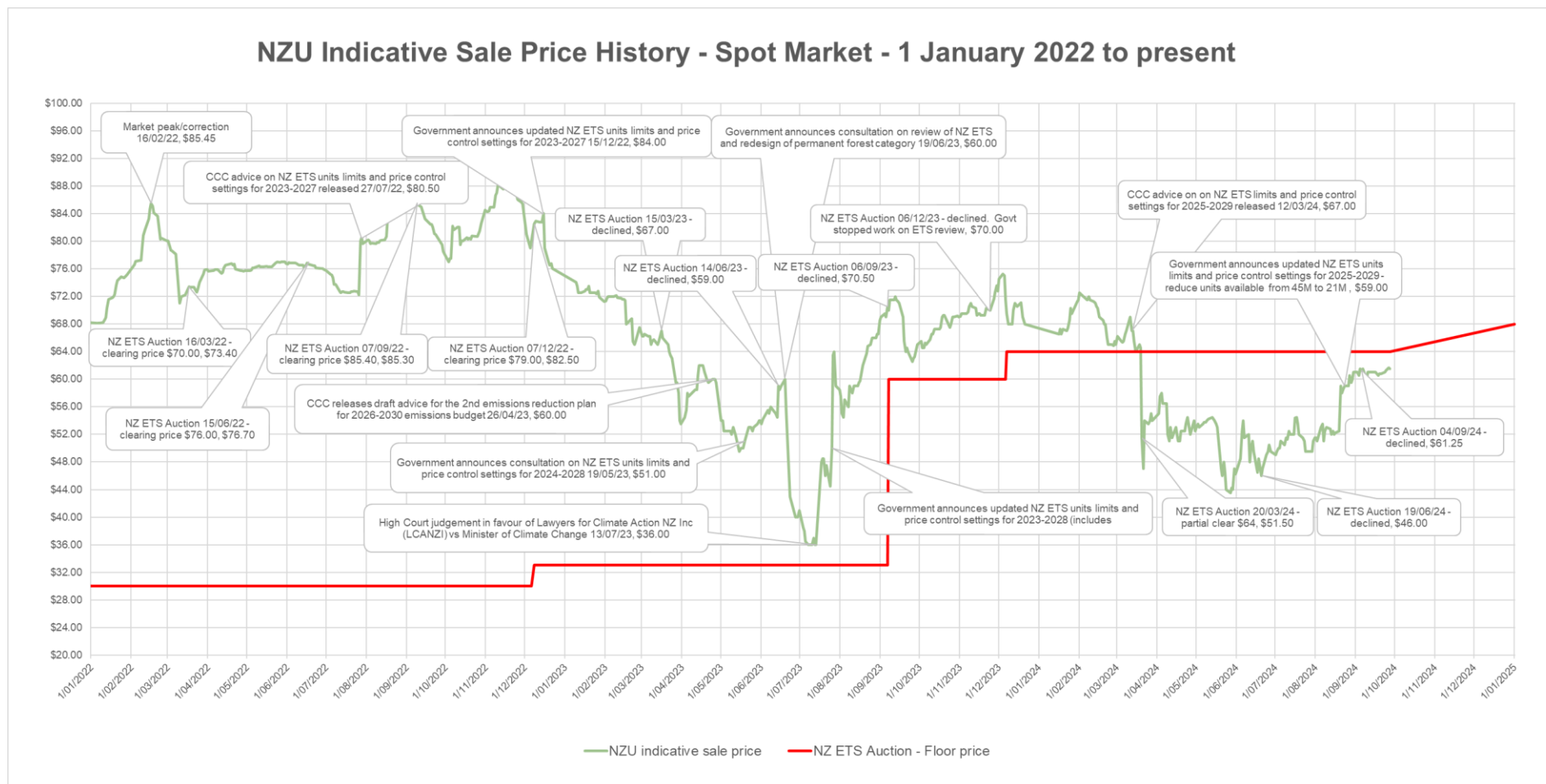
With the March Auction partially clearing at the minimum possible sale price the Government effectively signalled that the most you had to pay at auction in 2024 was the floor price ($64.00/NZU).

The secondary market has been consistently trading at below that since March, however, has recovered from the post-auction drop with some confidence appearing to be in the market as the Government has adopted some Climate Change Commission (CCC) advice and implemented some measures.

With the June and September auction failing to sell any units, all eyes are on the December auction to see if any units will be sold.

With the minimum floor price for NZ ETS Auctions next year at $68.00/NZU, we may see some demand, however, there are others better placed to provide effective commentary on that.

Figure 1: NZU indicative sale price history from 1/01/2022 to present

Post-1989 ETS applications

Delays that were caused by the Ministry for Primary Industries' (MPI) backlogs in 2022 and the introduction of a new computer system (Tupu-ake) in January 2023, have since improved.

New and proposed increases in ETS charges, without reasonable justification and/or a properly functioning system have also compounded issues, in particular the annual per hectare charge for ETS participants, and although currently under review, will have a profound effect on the amount of native or indigenous forests planted and entered into the scheme, as it actively works against planting indigenous species, due to the economics and sequestration involved.

Ironically, the only species that can potentially handle the proposed annual per hectare charge, are full scale radiata plantings, which is theoretically, not the intended outcome. It is expected that poor policy settings will continue to have a major impact in this area.

Barriers currently seen to further conversion

Government policy allowing Councils to have control of whole (or substantial areas) of farm planting, is seeing increased delays and costs involved.

Although this may actively help address the question around land use, added costs and delays (when some landowners are performing poorly in the current economic situation) is adding stress to the industry.

Last year we identified that if forward planning and order placement confirmation with nurseries was done in a timely manner, seedlings would be made available and grown on contract (i.e. limited seedlings grown).

This still holds true, with nurseries calling for confirmation of orders earlier than in previous years.

Additional capacity for both exotic and indigenous seedling production has appeared in the industry, due to previously forecast demand, as has an increase in trained labour.

Unfortunately, investment in these areas, in the current climate, are potentially no longer required.

The labour market which had been a cause for concern now has an over availability of capacity.

Successful establishment continues to involve on-going pest control and release spraying operations.

Pest control in areas where land scale conversions have taken place continue to be a source of tension in the farming community. We are seeing the same pattern where, once canopy closure of stands occurs, the wild pig population explodes onto neighbouring properties.

Established forestry companies tend to have a good working relationship with their neighbours, and others newer to the industry are starting to learn the value of establishing and maintaining good working relationships. The real barriers continue to be uncertainty around political interference and potential changes to the ETS rules going forward. There was hope that after the election, whatever the result, that some vision and structure would become apparent.

This has yet to eventuate as politicians appear slow to grasp the implications on the ETS and its role in our climate change and political landscape and provide little meaningful direction that allows landowners the confidence to make important decisions.

Discussion

Within Farm Plantings

There is still strong interest and commitment from farmers and landowners considering within-farm plantings, to diversify their income options and Greenhouse Gas (GHG) obligations.

Landowners throughout the country are, where suitable, establishing exotics, with a preference for slower growing species, to help support their business, especially in the less productive areas of their properties, that will not suit Production Forestry, due to probable environmental and cost concerns around road construction and land stabilisation when/if harvested.

Radiata pine will still play an important role, on this smaller scale, especially in areas with weed infestation.

The introduction of the NES-CF (National Environmental Standard – Commercial Forestry) has real cost implications for the potential NON-HARVEST of areas in the future. Forest owners with stands due for harvest, are making decisions around leaving their trees standing, as there is no positive financial return if they are harvested in the current environment, and the potential for environmental issues after harvest are weighed up.

Also, we are starting to see Forestry Rights/Joint Ventures, that are due for harvest, starting to expire with the trees still standing, as that is the least cost option. Some of these are registered under the Kyoto guidelines so have some earning potential within the ETS. Others will have no option but to enter the ETS under the PERMANENT category if they wish to generate an income stream, as they are over the 'average age' under averaging accounting.

Perhaps they will be able to transition to natives over time, however, the costs and mechanisms for this are yet to be fully understood.

As such access to the use of exotics within farming systems within the ETS is critical to promote the Right Species, Right Place mantra.

Funding for native plantings

Many landowners would like to establish natives where possible. They are still looking for financial help in establishing these native areas due to the costs involved, however, there is still no assistance from the Government for New Zealand farmers, even though they have the land available and the desire to plant and maintain indigenous species.

There is also talk of planting Government land in natives, however, the historical performance of Government agencies in the past has led to some less than ideal performances and results.

The Crown/Government should fund the landowners, who live and breathe the right use for the land, and can monitor the establishment and pest control, on a daily basis given the challenges faced in establishing indigenous species.

The strong uptake of the One Billion Trees Programme (1BT) planting grant by landowners, under the previous Government term, provided evidence that many farmers were actively assessing the long-term benefits associated with putting part of their farm in trees, planting 'the right tree in the right place' – where the right place is one which increases overall farm profitability, reduces total farm emissions, and may also confer other sustainable environmental and social benefits.

The current ETS fees review, and settings proposed, may ironically mean that the only species that can likely support the proposed fee structure, will be Long Term Permanent radiata or other exotic forests, which is against the rhetoric and desired outcomes put forward by the CCC and Government to date.

Once again, still a real threat and a possible unintended consequence of poor policy decisions/settings.

The danger mentioned in our previous reports still remains:

"if some form of funding does not eventuate soon, exotics, and radiata in particular, will become the 'go to' species due to the economics involved."

Many properties have land that is now, due to current economics, incapable of contributing positively to the farm's performance, however, it can provide a return in line with best land use, but what is marginal land?

The challenge and opportunity for the traditional farming operation to embrace the opportunities for forestry and carbon within their current farming models is still there, and now more important than ever to survival of farms.

Landowners who adopted the ETS opportunity early, are currently realising the benefits in otherwise tough times now, although it does place a restriction on future land use.

The questions remain:

If trees are the right use for the land, and eligible for the ETS, then the carbon is a bonus.

If it's not the right use for the land, why are you planting it in the first place?

But who decides?

Right Reason, Right Place, Right Species

Right Policy, Right Settings, Right Result

Appendices

Indicative Regional maps of all properties identified in this review are included below.
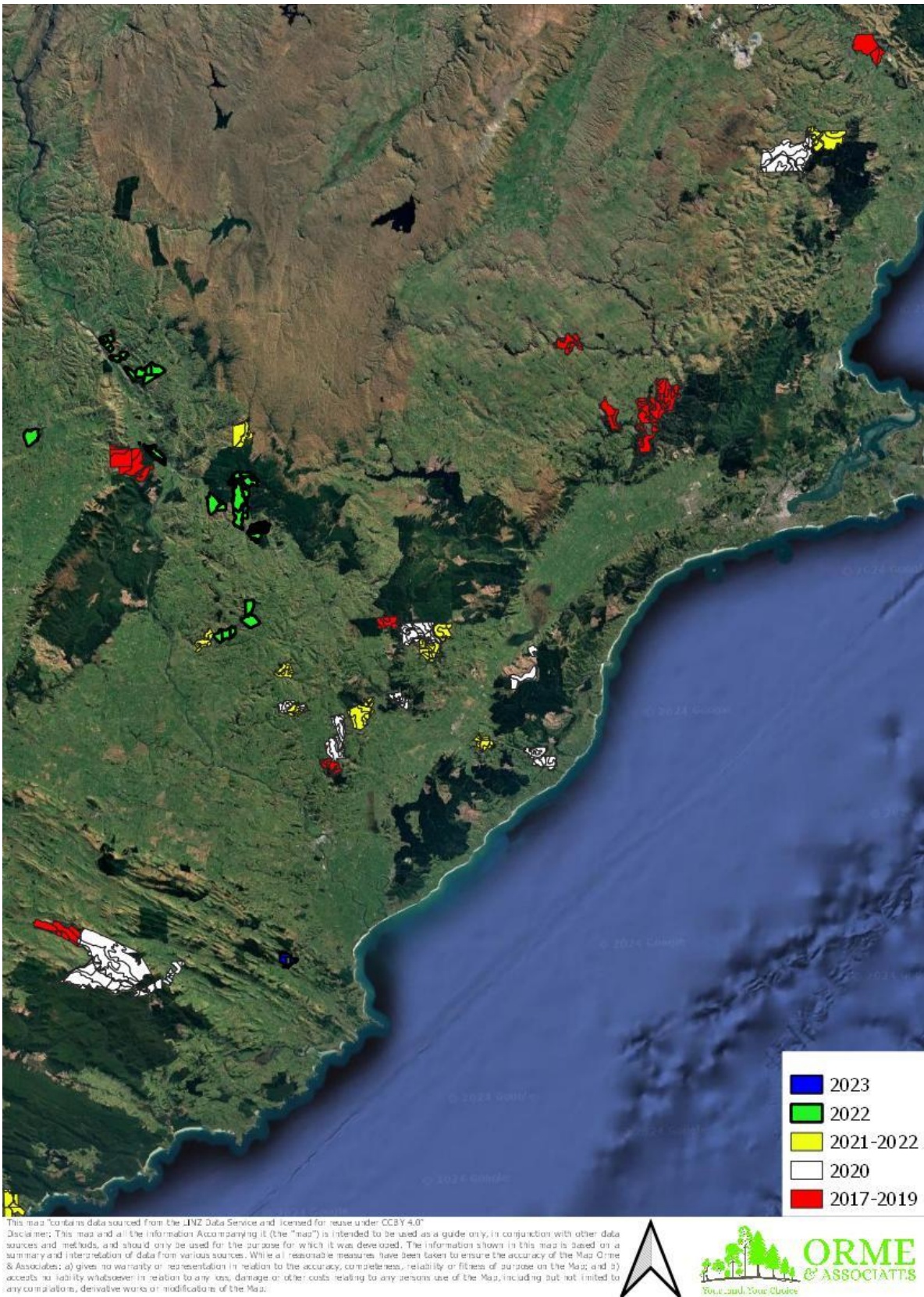
Map 1: Otago zoned land acquisitions for forestry

Map 2: Hawke's Bay zoned land acquisitions for forestry

Legend:
- 2023 (blue)
- 2022 (green)
- 2021-2022 (yellow)
- 2020 (white)
- 2017-2019 (red)

ORME & ASSOCIATES

Legend:
- 2023 (blue)
- 2022 (green)
- 2021-2022 (yellow)
- 2020 (white)
- 2017-2019 (red)

Map 3: Greater Taranaki / Waikato Region zoned land acquisitions for forestry
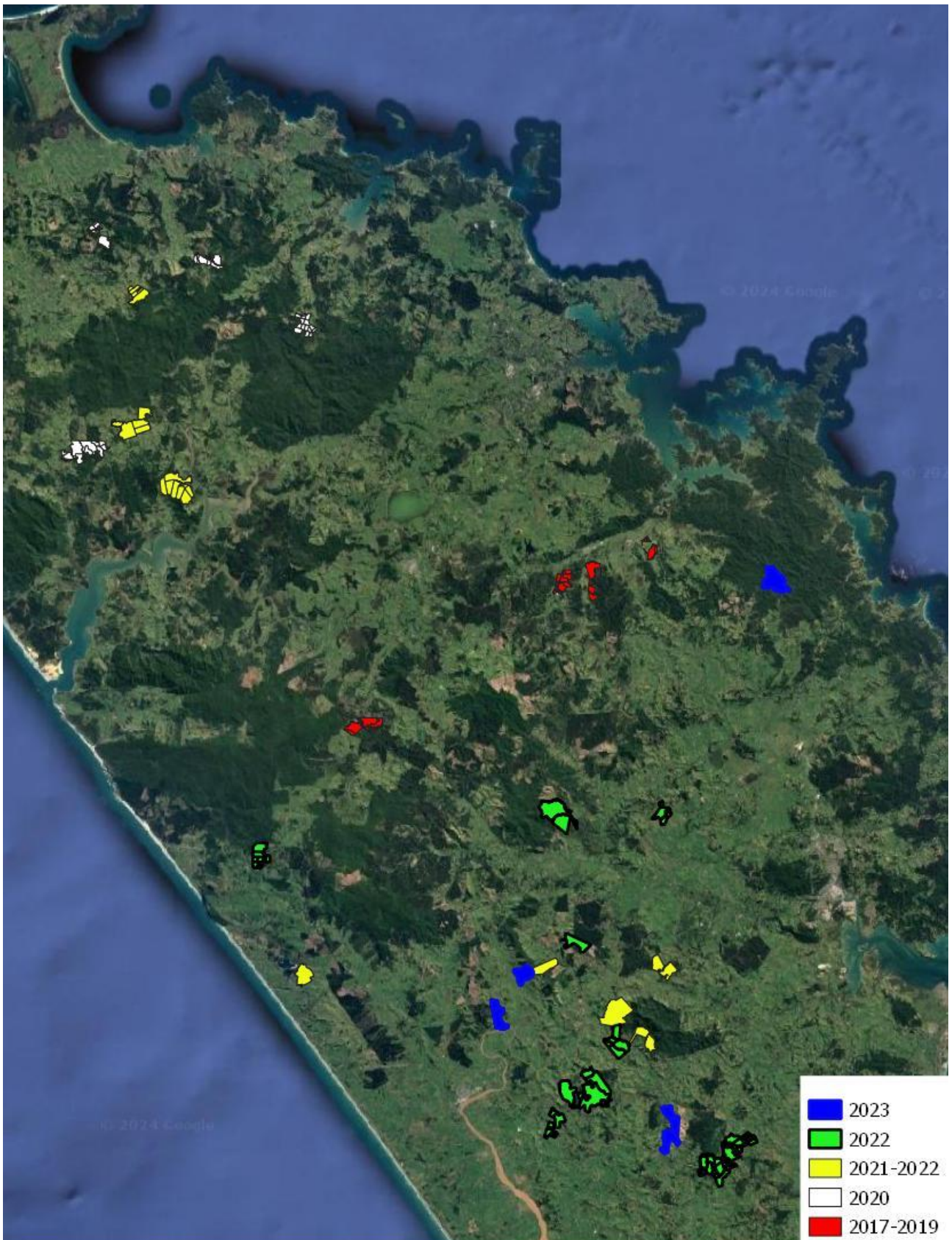
Map 4: Northland zoned land acquisitions for forestry

Map 5: Gisborne / Hawke's Bay zoned land acquisitions for forestry