

Prepared by the Economic Division in Wellington

Key Points

- Canterbury contributes 12% of New Zealand's total GDP, employing about 14% of all New Zealand filled jobs.
- In 2019, \$14.3 billion (12%) of New Zealand's total goods trade was via Canterbury, through the Ports of Lyttelton and Timaru, and Christchurch Airport.
- Private services, primary food exports, retail and wholesale trade, manufacturing and construction contribute the most to the region's GDP.
- Canterbury has the third highest number of export-oriented jobs, but as a proportion of its entire labour composition, sits in the lower half of the regions for goods export jobs as a proportion of its labour force.
- Canterbury exports \$11.5 billion (18%) of its total gross output and imports \$5.2 billion (15%) worth of intermediate inputs.

Insights

Canterbury is an important source for New Zealand's economic activity, contributing about \$30.1 billion in GDP, 12% of total GDP. Within this region, private services contribute the most to regional GDP, about 28%, followed by primary food exports (12%), construction (11%), retail and wholesale (8%), and manufacturing (8%).

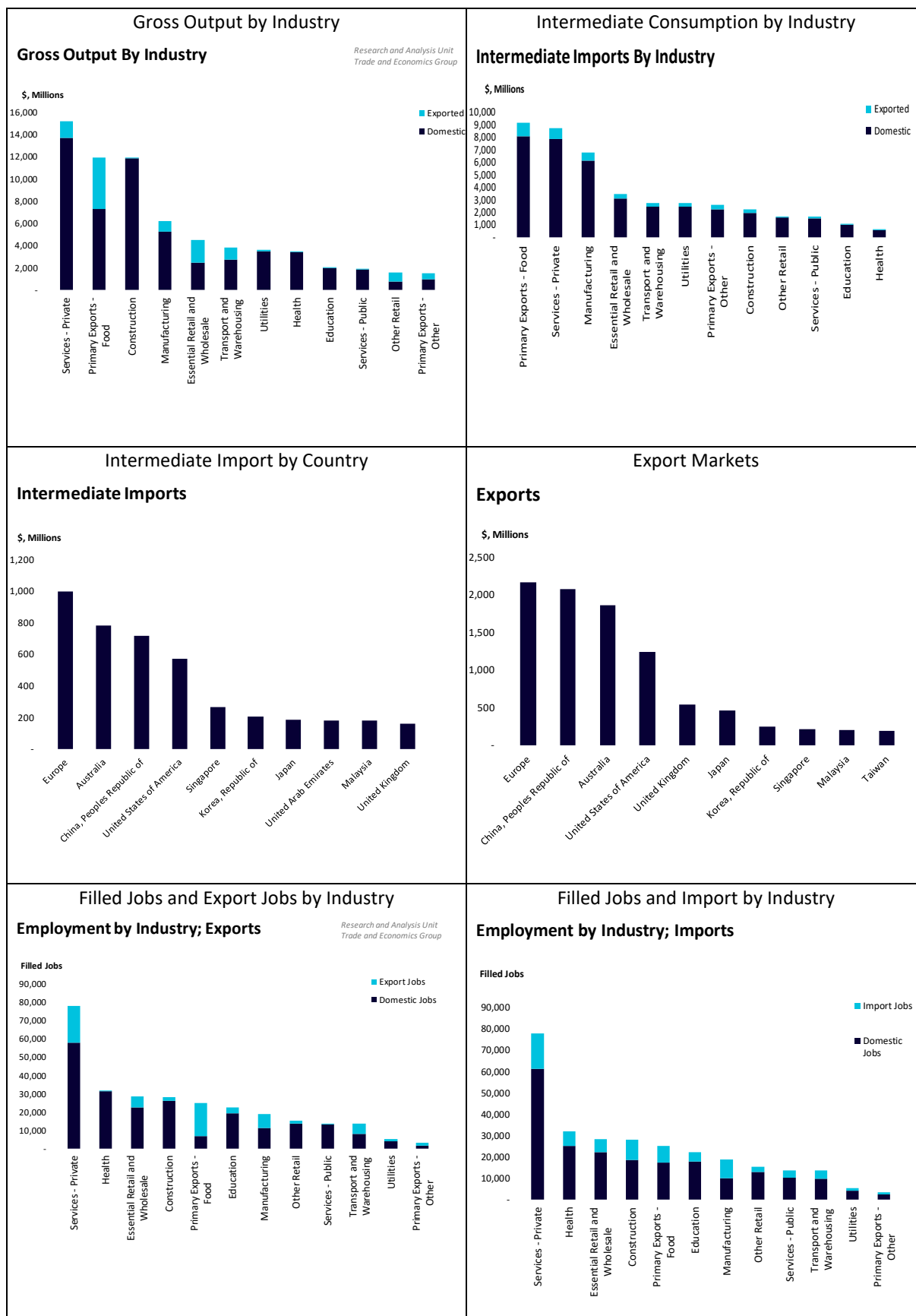
In 2019, \$14.3 billion (12%) of New Zealand's total goods trade was via Canterbury, through the Ports of Lyttelton and Timaru, and Christchurch Airport. \$8.0 billion (13%) of New Zealand's goods exports departed via Canterbury, while \$6.3 billion (10%) of goods imports arrived. We suspect that Christchurch Airport's role is understated in the trade data, as high value exports (e.g. seafood) often transit Christchurch before being airfreighted internationally from Auckland Airport.

As New Zealand's largest region by land area, and an important source of agricultural production, Canterbury has the second highest employed, about 280,000 – making up 14% of New Zealand's total filled jobs. Industry employment within Canterbury is somewhat aligned to GDP contributions: Private services making up 28% of filled jobs, then health (11%), retail and wholesale (10%), construction (10%) and primary food exports (9%).

We estimate that about \$11.5 billion (18%) of regional gross output is exported. On a proportional basis, compared to other regions, Canterbury falls in the lower half of the group, above Otago and below the Manawatu-Wanganui regions. Within the region, industries that have high exported output are other retail (52%), essential retail and wholesale (46%), primary exports food (39%), primary exports other (36%), and transport and warehousing (30%).

In terms of intermediate inputs, Canterbury imports about \$5.2 billion (15%) of its intermediate consumption, with manufacturing (37%), transport and warehousing (22%), health (15%), other primary exports (13%) and primary food exports (12%) being some of the industries that have a particular reliance on imported intermediate consumption. In comparison to other regions for imported intermediate consumption, Canterbury is within the top half of the group – slightly above Bay of Plenty and below Auckland.

Around 68,000 (24%) of Canterbury jobs are export related. As a proportion, Canterbury sits within the lower half of the group for export related employment; above Nelson and slightly below the Manawatu-Wanganui regions. We estimate that Canterbury employment from import related jobs is about 72,000. As a proportion of employment, this is the third highest region for import related jobs, just below Auckland and Hawke's Bay.



Source: Sense Partners, Stats NZ

Note: There is no official trade data by region. In this note we use a novel data set created by Sense Partners for MFAT to link regional gross domestic product by industry to exports. These are our best estimates of exports from the region. Due to data limitations the estimates refer to the year to June 2018. For a non-technical summary of the methodology see [MFAT Analytical Report Industry Exposure to Trade](#).

ANNEX: INDUSTRY AGGREGATIONS

Category	Industry Grouping	Industry
Key Exporters	Primary Exports - Food	AA11. Horticulture and fruit growing
		AA12. Sheep, beef cattle, and grain farming
		AA13. Dairy cattle farming
		AA14. Poultry, deer, and other livestock farming
		AA31. Fishing and aquaculture
		AA32. Agriculture, forestry, and fishing support services and hunting
		CC11. Meat and meat product manufacturing
		CC12. Seafood processing
		CC13. Dairy product manufacturing
		CC14. Fruit, oil, cereal, and other food product manufacturing
		CC15. Beverage and tobacco product manufacturing
	Primary Exports - Other	AA21. Forestry and logging
		BB11. Mining
		CC31. Wood product manufacturing
		CC32. Pulp, paper, and converted paper product manufacturing
Essential Services	Health	QQ11. Health care and social assistance
	Essential Retail and Wholesale	FF11. Wholesale trade
		GH11. Motor-vehicle and motor-vehicle parts and fuel retailing
		GH12. Supermarket, grocery stores, and specialised food retailing
	Transport and Warehousing	II11. Road transport
		II12. Rail, water, air, and other transport
		II13. Postal, courier, transport support, and warehousing services
	Utilities	DD11. Electricity and gas supply
		DD12. Water, sewerage, drainage, and waste services
		JJ11. Information media services
		JJ12. Telecommunications, internet, and library services
Recovery Phase	Non-Primary Manufacturing	CC21. Textile, leather, clothing, and footwear manufacturing
		CC41. Printing
		CC51. Petroleum and coal product manufacturing
		CC52. Basic chemical and chemical product manufacturing
		CC53. Polymer product and rubber product manufacturing
		CC61. Non-metallic mineral product manufacturing
		CC71. Primary metal and metal product manufacturing
		CC72. Fabricated metal product manufacturing
		CC81. Transport equipment manufacturing
		CC82. Machinery and other equipment manufacturing
		CC91. Furniture and other manufacturing
	Construction	EE11. Building construction
		EE12. Heavy and civil engineering construction
		EE13. Construction services
	Education	PP11. Education and training
	Other Retail	GH13. Other store-based retailing and non-store retailing
	Services - Private	GH21. Accommodation and food services
		KK11. Finance
		KK12. Insurance and superannuation funds
		KK13. Auxiliary finance and insurance services
		LL11. Rental and hiring services (except real estate)
		LL12. Property operators and real estate services
		MN11. Professional, scientific, and technical services
		MN21. Administrative and support services
		RS11. Arts and recreation services
		RS21. Other services
	Services - Public	OO11. Local government administration
		OO21. Central government administration, defence, and public safety

Note: The aggregation of industries into Industry Groupings is solely for analytical purposes.

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