MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

TE ŌHANGA MĀORI 2023

THE MĀORI ECONOMY 2023

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KEY THEMES

Te Ōhanga Māori continues to be a strong, growing, unique, and diversified component of the Aotearoa New Zealand economy.

The Māori economy is transforming, moving beyond agriculture, forestry, and fishing

The Māori economic contribution to the Aotearoa New Zealand economy has grown from $17 billion (6.5 percent of GDP) in 2018 to $32 billion (8.9 percent of GDP) in 2023. While agriculture, forestry, and fishing were the primary contributors in 2018, administrative, support, and other services ($4.2 billion), and professional services ($5.1 billion) now lead the way.

Remarkable growth in the Māori asset base from $69 billion to $126 billion

The Māori asset base has grown from $69 billion in 2018 to $126 billion in 2023, representing an 83 percent increase. This is made up of $66 billion in assets for Māori businesses and employers, $41 billion in assets for Māori trusts, incorporations, and other Māori entities (Māori collectives), and $19 billion in assets for self-employed Māori.

Entrepreneurship has continued with a solid growth trajectory, although it still lags behind the national average

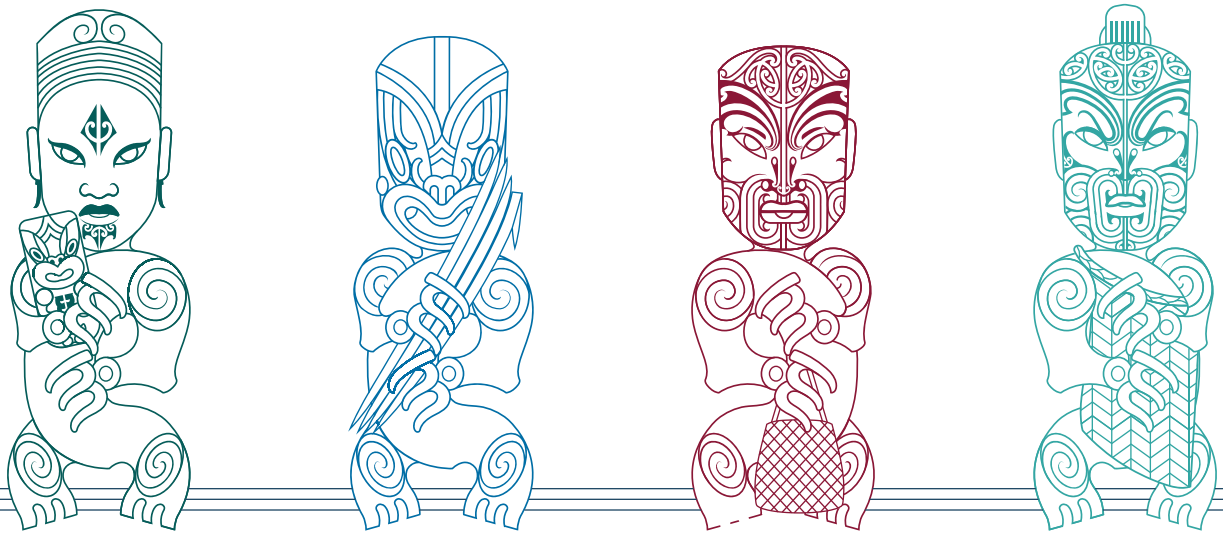
Māori entrepreneurship experienced dramatic growth again between 2018 and 2023. The number of self-employed Māori surged by 49 percent, while the number of Māori employers increased by 31 percent. Despite this significant progress, Māori remain underrepresented in these roles compared to the wider Aotearoa New Zealand population.

For the first time since 2006, Māori workers now hold more high-skilled jobs than low-skilled jobs

Māori representation in the workforce is growing, with the younger generation entering the workforce. Additionally, there has been a positive shift in the skill levels of Māori workers, with 46 percent now in high-skilled jobs, 14 percent in skilled jobs, and 40 percent in low-skilled jobs. In 2018, 37 percent of Māori were in high-skilled jobs and 51 percent in low-skilled jobs.

For Māori households economic disparity persists, despite recent positive trends

Home ownership rates continue to be lower among Māori, with only 52 percent of Māori households owning their homes, compared to 67 percent of non-Māori households. Additionally, government grants and social benefits constitute a larger portion of Māori household income, accounting for 33 percent of the total, while this figure is only nine percent for non-Māori households. Notably, this is the first time since 2006 that government assistance for Māori households has not increased.



FOREWORD

Tēnā koutou katoa.	Greetings to you all.
E ngā mana, e ngā reo, e ngā hau e whā, tēnā koutou, tēnā koutou, tēnā koutou katoa.	To the esteemed ones, to the voices, to the four winds, greetings, greetings, warm greetings to you all.
Ko te whenua te tāhuhu o te oranga.	The land is the foundation of well-being.
Ko ngā awa me ngā moana ngā ikapānga o te ōhanga.	The rivers and seas are the lifeblood of the economy.
Ko ngā ngahere me ngā maunga ngā pou o te tūrangawaewae.	The forests and mountains are the pillars of our place of belonging.
Ko te tangata te poutokomanawa o te katoa.	The people are the heart of everything.
Ko te ahurea te mauri o te mahi.	Culture is the essence of our work.
I roto i ngā tau kua pahure, kua tipu te ōhanga Māori,	Over the past years, the Māori economy has grown,
Mai i ngā tikanga tuku iho ki ngā hangarau hou,	From traditional customs to modern technologies,
I runga i te ara o te mātauranga me te auahatanga.	Following the path of knowledge and innovation.
Ko tēnei pūrongo he tirohanga ki te kaha o te ōhanga Māori,	This report provides insight into the strength of the Māori economy,
He whakaatu i te pitomata o āpōpō,	Showcases the potential of the future,
He hononga ki ngā tikanga o nehe,	Connects to the traditions of the past,
He ara whakamua mō ngā uri whakatipu.	And paves the way forward for future generations.
Nō reira, tēnā koutou, tēnā koutou, tēnā tātou katoa.	Therefore, greetings, greetings, greetings to us all.

Tēnā koutou katoa,

It is a privilege to present Te Ōhanga Māori 2023 – The Māori Economy Report 2023. This work, commissioned by the Ministry of Business, Innovation and Employment (MBIE) and prepared by Business and Economic Research Limited (BERL), provides important insights into the strength of the Māori economy, and its potential for the future.

Te Ōhanga Māori 2023 highlights the significant economic contributions being made today and the significant growth in the Māori asset base. This growth reflects the efforts, vision, and strategic investment of Māori businesses and communities. While established sectors like agriculture, forestry, and fishing remain strong, we are also seeing diversification and growth in areas such as real estate and property services. This diversification strengthens the resilience and adaptability of the Māori economy.

This report is a resource for all those who are invested in the future of Aotearoa New Zealand, including policymakers, businesses, Iwi-Māori and communities. The insights shared in this report will inform decision-making, collaboration and help unlock further potential within the Māori economy. We are committed to working in partnership to support Māori economic aspirations and contribute to a more prosperous and inclusive future for all New Zealanders.

Ngā mihi nui,

Carolyn Tremain

Secretary for Business, Innovation and Employment and Chief Executive

Te Hēkeretari, te Tumu Whakarae mō Hīkina Whakatutuki

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1 INTRODUCTION

The Ministry for Business, Innovation and Employment (MBIE) commissioned Business and Economic Research Limited (BERL) to update and provide the fourth iteration of Te Ōhanga Māori (the Māori economy).

Te Ōhanga Māori 2018 (BERL, 2021) was compiled amidst the COVID-19 pandemic, utilising data collected prior to the pandemic's onset. This iteration serves as a comprehensive baseline, enabling an analysis of the pandemic's impact on Māori and Māori businesses over the past five years.

The 2023 report presents financial measures of the core resources (assets) available to Māori, as well as the flows of income, expenditure, and gross domestic product (GDP) received, spent, produced, and delivered by Māori in Aotearoa New Zealand in the 2023 year. We also provide demographic and employment data for Māori in Aotearoa New Zealand for the same period.

1.1 DATA AND METHODOLOGY IMPROVEMENTS

Continued updates of Te Ōhanga Māori bring with them methodological improvements and additional areas of research.[1] We have improved our analysis of Māori businesses with support from Te Puni Kōkiri (TPK) and in line with their biannual Te Matapaeroa release. In this present iteration we have presented actual business entity counts (in line with Te Matapaeroa), as well as the workforce status of Māori individuals (sourced from Census 2023 and consistent with previous iterations of Te Ōhanga Māori). The expansion to include actual business entity counts has also allowed us to provide data on the involvement and performance of Māori exporting businesses.

Key data sourced from the Māori Land Court (MLC) has also improved since the previous iteration of Te Ōhanga Māori, allowing for a more comprehensive and accurate depiction of Māori land and land value. This is an important input into our model of Te Ōhanga Māori.

Where at all possible, we retain consistent definitions and categorisations with our previous three iterations of Te Ōhanga Māori, specifically the 2018 version, unless otherwise stated. A specific change in our methodology has resulted from improving and aligning our methodology with Te Matapaeroa. This present iteration provides a more robust and accurate estimate of the total asset base of private Māori-owned businesses through this improvement.

Both this current report and the previous 2018 and 2013 versions extensively leveraged official statistics available in Statistics New Zealand (Stats NZ) Datalab, namely the Integrated Data Infrastructure (IDI) and Longitudinal Business Dataframe (LBD).[2]

The glossary section of this report provides definitions of kupu Māori, technical terms, and abbreviations (Appendix E).

Rohe

The boundary determinations of the eleven rohe in the report are depicted in Figure 1. These boundary determinations have been kept consistent with previous iterations of Te Ōhanga Māori. Further details of the alignment with TPK and MLC rohe, as well as local government boundaries, are provided in Appendix D.

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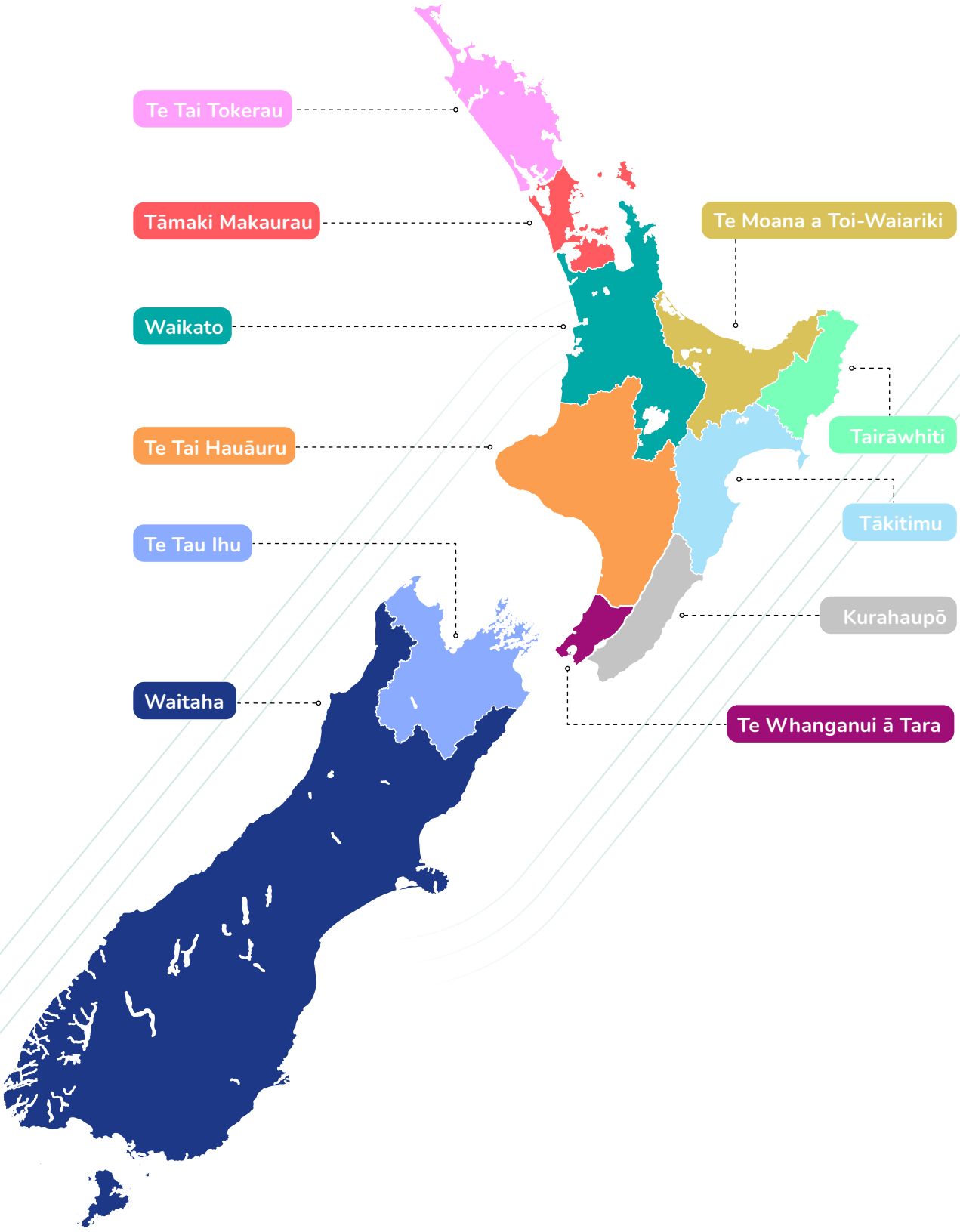
1 More information on methodological improvements and expansion is provided in Appendix A.

2 More information on the scope and data sources is available in Appendix B.

Figure 1 Rohe disaggregation



Source: Te Puni Kōkiri

2 WHAT DO WE MEASURE?

How do we accurately measure the economic contributions of Māori?

The economy can be understood as a system or framework that guides how a society manages its resources. This framework dictates how we produce goods and services, how we consume them, and how we decide who gets what. The conventional metric for measuring this contribution is GDP. We know that GDP is a good indication of a country's economic position but it has long been criticised for its limitations. GDP focuses solely on the monetary value of goods and services produced within a country over a specific period, and this narrow focus can lead to misleading conclusions about economic health as it fails to account for factors like resource depletion, environmental degradation, and social inequality. Within Te Ōhanga Māori, our focus was on measuring the contribution within the system (framework) as broadly as possible.

2.1 WHAT IS INCLUDED IN TE ŌHANGA MĀORI?

Manaaki whenua, manaaki tangata, haere whakamua

Care for the land, care for the people, go forward.

Te Ōhanga Māori is not always a separate, distinct, and clearly identifiable segment of the Aotearoa New Zealand economy. It is a closely connected component of numerous pieces of the jigsaw puzzle that together make up the economy. In measuring the contribution of Māori to the economy, we focused on measuring Māori participation, contribution, and connections to this jigsaw puzzle.

In Te Ōhanga Māori 2018, we focused on Treasury's Living Standards Framework (LSF). This reiteration builds on the LSF (four capitals) and expands the framework to include inclusive wealth. This is a concept championed by the United Nations Environment Programme (UNEP), which offers a compelling alternative to GDP. It recognises that a nation's true wealth extends beyond its material assets and encompasses a broader range of assets that includes natural capital, human capital, and produced capital (Figure 2).

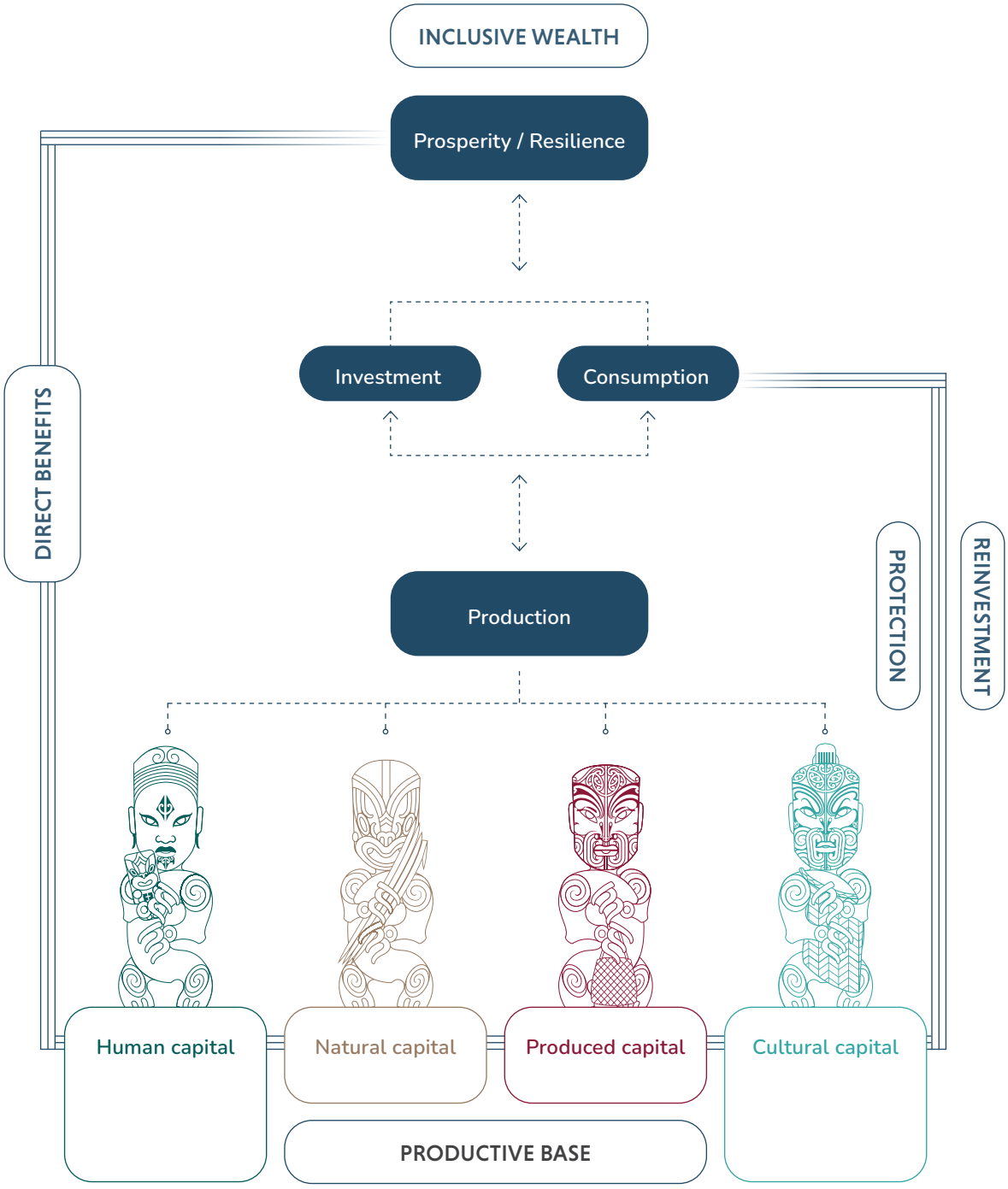
The LSF four capitals and inclusive wealth are depictions of the stock of resources, or taonga, that are within our possession or under our guardianship. The application or utilisation of these resources, to generate flows of incomes, boost expenditures, and deliver well-being outcomes, is the essence of the economic mechanism. Te Ōhanga Māori takes a comprehensive approach to measuring the economic contribution by recognising the interconnectedness of various forms of capital. This framework extends beyond traditional economic models to encompass not only produced capital (e.g., manufactured goods, infrastructure) but also natural, human and cultural capital.

Central to the concept of natural capital within Te Ōhanga Māori is whenua, incorporating land, water, and all the resources they provide. This emphasis recognises the intrinsic value of the natural environment and its crucial role in Te Ao Māori. The framework seeks to quantify and value the contributions of sectors like agriculture, forestry, and fishing, acknowledging their significance within the broader economic landscape.

Furthermore, Te Ōhanga Māori places a strong emphasis on human and cultural capital. Recognising the vital contributions of Māori to the workforce, the framework acknowledges that Māori earning salaries and wages constitute a substantial portion of the Aotearoa New Zealand economy. This highlights the importance of investing in education, skills development, and cultural preservation to enhance the economic development of Te Ōhanga Māori.

Te Ōhanga Māori 2023 continues our attempts to provide a more holistic picture of wealth by accounting for all forms of capital. This broader perspective helps policymakers identify potential trade-offs between different types of capital and make more informed decisions.

Figure 2 Inclusive wealth



Source: Adopted from United Nations Environment Programme

3 SNAPSHOT

Te Ōhanga Māori is a strong, distinct, growing, and diversified component of the Aotearoa New Zealand economy.

MĀORI POPULATION

- The Māori population experienced substantial growth between 2018 and 2023, increasing by 14 percent from 775,800 to 887,500. This growth rate significantly outpaced the five percent increase observed in the non-Māori population during the same period.

MĀORI WORKFORCE

- The total number of Māori employed (including employers, employees, self-employed, and unpaid workers) totalled 390,700 in 2023, up 19 percent from 329,200 in 2018.
- More Māori were now employed in high-skilled jobs compared to those in low-skilled jobs.

MĀORI ASSET BASE

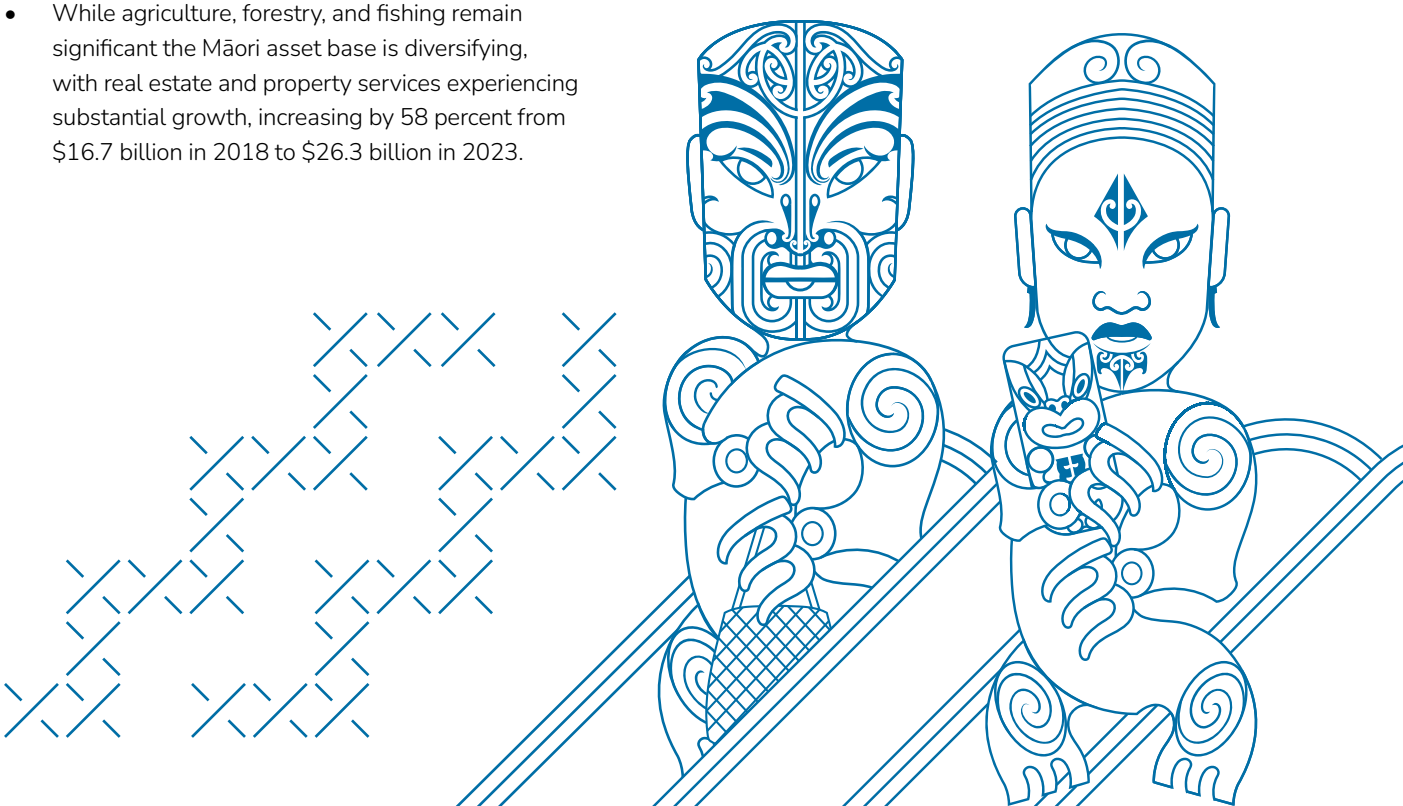
- In 2023, the asset base within Te Ōhanga Māori was valued at $126 billion, following an 83 percent increase from $69 billion in 2018.
- While agriculture, forestry, and fishing remain significant the Māori asset base is diversifying, with real estate and property services experiencing substantial growth, increasing by 58 percent from $16.7 billion in 2018 to $26.3 billion in 2023.

MĀORI VALUE ADD (GDP)

- Value added (production GDP) from Te Ōhanga Māori totalled $32 billion in 2023, up from $17 billion in 2018.
- The three largest sectors were professional, scientific, and technical services at $5.1 billion; administrative, support, and other services at $4.2 billion; and real estate and property services at $4.1 billion.

MĀORI-OWNED BUSINESSES

- In 2023, there were nearly 24,000 Māori-owned businesses in Aotearoa New Zealand, an increase from 19,200 in 2018.
- The largest number of businesses, 5,934, was located in Tāmaki Makaurau followed closely by Waitaha with 4,215 Māori-owned businesses.



4 TE ŌHANGA MĀORI CONTRIBUTION TO GDP

Nāu te rourou, nāku te rourou, ka ora ai te iwi

With your food basket and my food basket, the people will thrive.

In recent decades the Māori economy has seen impressive growth, making a significant contribution to Aotearoa New Zealand's overall economic success.

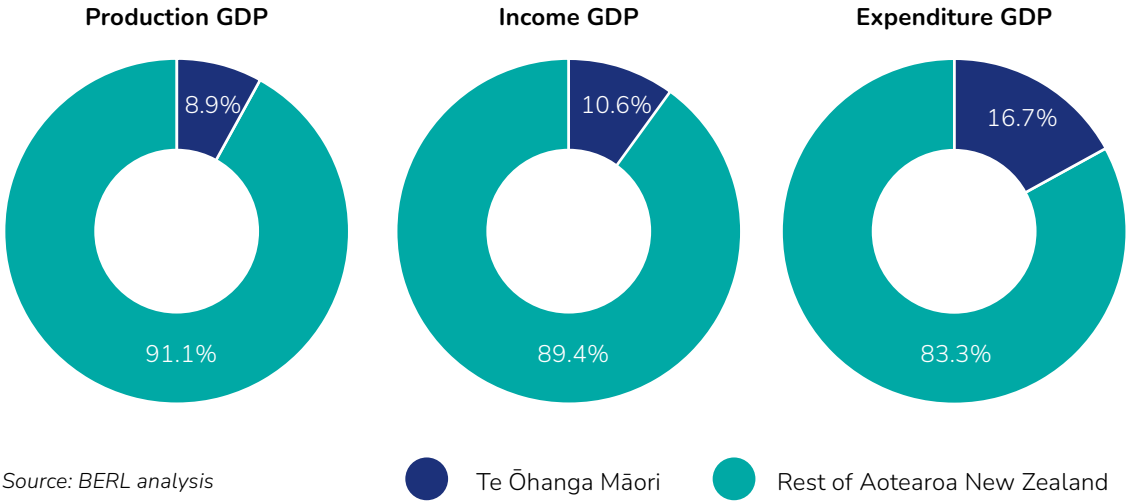
4.1 GDP ACROSS ALL DIMENSIONS

Figure 3 depicts how Te Ōhanga Māori contributes to GDP in Aotearoa New Zealand across three different dimensions:

- Value added produced by Māori organisations (the production measure)
- Income (wages and profits, also known as operating surplus) received by Māori individuals (the income measure)
- Spending of Māori households and businesses (the expenditure measure).

The three measures presented provide a different insight into the participation of Māori in the economy of Aotearoa New Zealand. Across each of the three measures in 2023, the contribution from Te Ōhanga Māori ranged from 8.9 percent to nearly 17 percent of the activity in 2023 in the economy of Aotearoa New Zealand.

Figure 3 Three perspectives of GDP from Te Ōhanga Māori, 2023



Source: BERL analysis

PRODUCTION MEASURE OF GDP

The production measure of GDP focuses on the value added by the activities of Māori entities (i.e., organisations, trusts, and incorporations), as well as by the businesses of Māori employers and self-employed Māori. It measures the value added in the activities of these enterprises in producing goods and or delivering services. In 2023, Te Ōhanga Māori totalled $32 billion, compared to $327 billion for all other businesses in Aotearoa New Zealand.

INCOME MEASURE OF GDP

The income measure of GDP estimates the incomes received by individuals (e.g., wages) and organisations (e.g., profits). This income results from an individual's employment, and organisational operations in the production and delivery of goods and services. In 2023, income GDP from Te Ōhanga Māori totalled $37 billion. The comparable figure for the rest of Aotearoa New Zealand individuals and organisations was $310 billion.[3]

EXPENDITURE MEASURE OF GDP

The expenditure measure of GDP estimates the spending of households, businesses, government, and overseas entities on goods produced and services delivered in Aotearoa New Zealand. From this perspective, the spending of Māori households and businesses in the 2023 year totalled $54 billion. The comparable figure for the rest of Aotearoa New Zealand households and businesses was $268 billion.[4]

Not all spending on goods and services is included in the expenditure measure of GDP. Spending by firms on intermediate materials that are used up in the production of other goods and services is excluded. Also excluded is spending on goods produced overseas or services delivered from overseas.

Limitations of GDP as a measure of economic activity

While GDP is a standard, globally recognised measure of an economy's size and performance, there are critical shortfalls and blind spots inherent in it as a measure. Specifically, GDP fails to measure the informal economy where Māori actively participate. This includes unpaid work and care, such as caring for whānau inside or outside one's own household. The informal economy (or non-market activity) plays a role in mediating the flows within the formal economy and influences the quality and quantity of labour within the formal economy (BERL, 2023). This ultimately distorts the reality of activity captured by GDP.

While we recognise the bluntness of GDP, this report does not endeavour to fill this gap. Rather, we acknowledge the importance of further and greater developments to compensate for GDP's shortfalls.

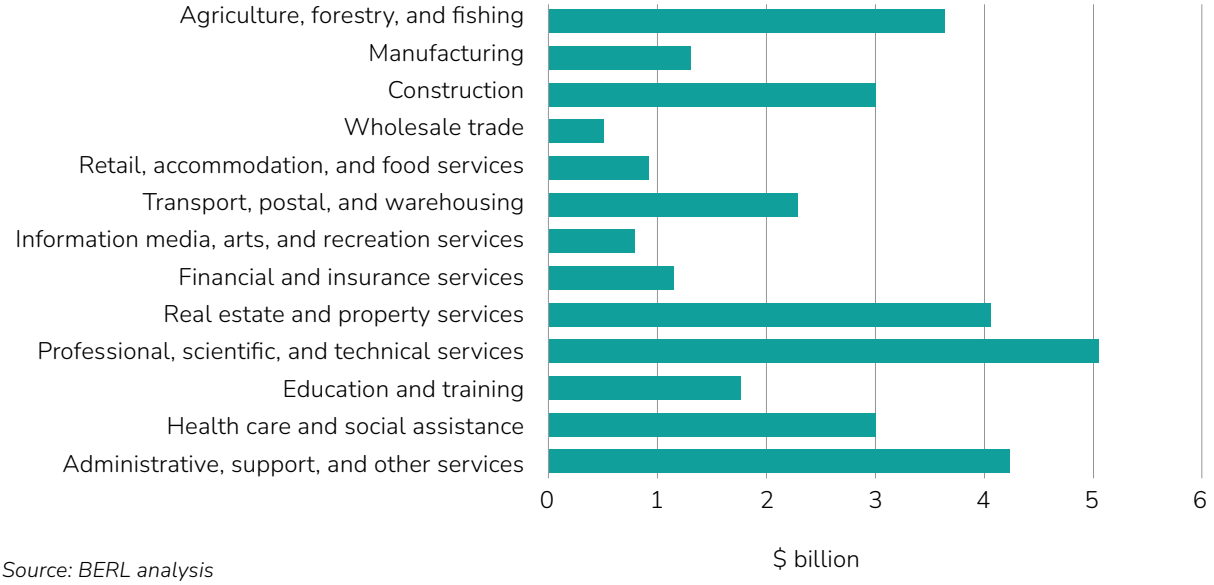
4.4 CONTRIBUTION IN PRODUCTION GDP

Value added (production GDP) from Te Ōhanga Māori totalled $32 billion in 2023, up from $17 billion in 2018. While this growth is significant at a headline level, it conceals the significant transformation of the Māori economy with less economic activity concentrated in the primary industries of agriculture, forestry, and fishing, and more concentrated in diverse areas, such as professional, scientific, and technical services; and administrative, support, and other services (Figure 4).

3 Consistent with the Stats NZ national accounting practices, this also includes the operating surplus (imputed or notional rent) of Māori households residing in their owner-occupied housing.

4 This comparison excludes spending by government and on exports (i.e., spending by overseas entities).

Figure 4 Value added of Te Ōhanga Māori by sector, 2023



Source: BERL analysis

The Māori economy has shifted dramatically since 2018 moving away from its traditional reliance on primary industries, with the three largest sectors in 2023 being:

- Professional, scientific, and technical services at $5.1 billion
- Administrative, support, and other services at $4.2 billion
- Real estate and property services at $4.1 billion.

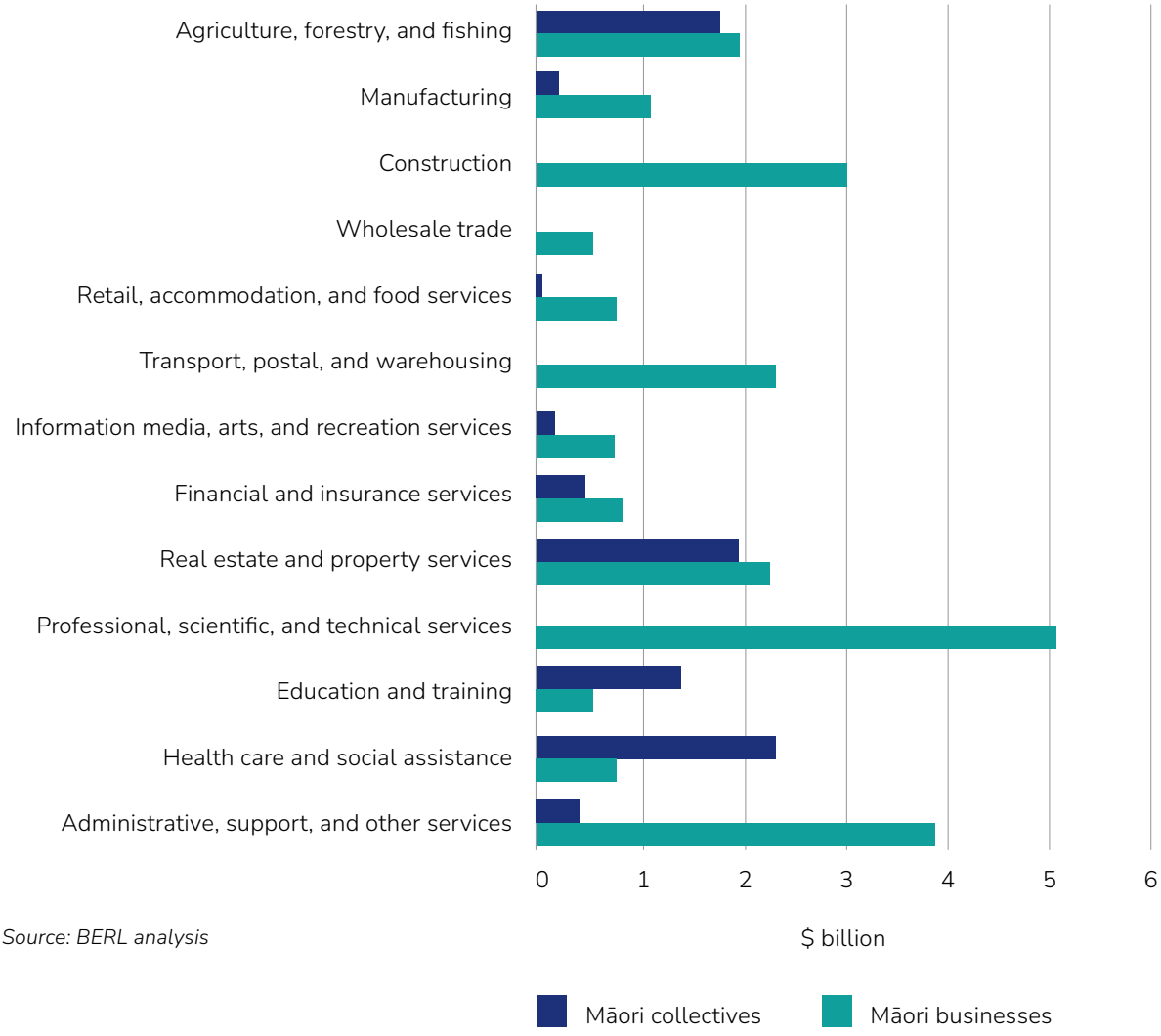
In particular, the professional, scientific, and technical services sector increased by four-fold, up from $1.2 billion in 2018. This sector includes high-value services such as architecture and engineering, scientific research and development, computer and information technology services, and management consulting.

The construction and transport, postal, and warehousing sectors both also grew notably to contribute over $2 billion each in value add. At the same time, some sectors within Te Ōhanga Māori have experienced a decline in their productive GDP generated, namely manufacturing, retail, accommodation, and food services, and wholesale trade.

MĀORI BUSINESSES AND COLLECTIVES' CONTRIBUTION

There is a distinct difference in the GDP contribution between the collectives and Māori businesses. Māori collectives represent a broad grouping of Māori incorporations, trusts, and post-settlement governance entities (PSGEs), which may be formed by whānau, hapū, and iwi from around Aotearoa New Zealand. The collectives value add is concentrated in healthcare and social assistance ($2.2 billion); real estate and property services ($1.9 billion); and agriculture, forestry, and fishing ($1.6 billion) (Figure 5).

Figure 5 GDP by industry for Māori businesses and collectives, 2023



Source: BERL analysis

However, for Māori businesses, the majority of the value add is from professional, scientific, and technical services ($5.1 billion), followed by administrative, support, and other services ($3.9 billion) and construction ($3 billion).

Particularly high production GDP from Māori businesses in the professional, scientific, and technical services industry is partly driven by continued growth in the delivery of specialised services, as well as the industry being well suited to self-employed Māori free-lancing and providing contracted work.

MĀORI TOURISM

Unlike most other industries, tourism is distinct in that it is not separately defined in the standard classifications of industries; instead, it is represented across multiple industries.[5] In 2023, it was estimated that Māori tourism contributed $1.2 billion in production GDP, up from $975 million in 2018 (BERL, 2025). This contribution came from Māori tourism businesses and Māori collectives and represented four percent of production GDP in Te Ōhanga Māori.

Māori tourism businesses' contribution to the tourism industry

Māori tourism businesses play a pivotal role in shaping the Māori tourism industry in Aotearoa New Zealand. These businesses are characterised by Māori-owned and -operated private businesses, from employers to self-employed, providing diverse and culturally enriched offerings through an array of unique services and experiences, from hiking and walking tours to adventure tourism and water activities. Such experiences are what Māori tourism is built upon, and also extend to warm, culturally enriched services in general tourism industries that support the overall Māori tourism offering.

Māori tourism businesses generated $1 billion in production GDP in 2023, accounting for 83 percent of Māori tourism's overall contribution (BERL, 2025).

Māori collectives' contribution to the tourism industry

Māori collectives' size and activities vary significantly, from large commercial entities to smaller local businesses, and can include Māori incorporations, trusts, and PSGEs. Māori collectives play an important role in the tourist experience, acting as a powerful proponent of Māori tourism. Their involvement promotes a unique blend of cultural immersion, economic empowerment, and environmental awareness. This enriches the tourism offerings of Māori collectives. For example, guided tours led by iwi delve into history, language, and customs. Visitors have the opportunity to witness vibrant cultural performances or access sacred sites that allow tourists to connect with Māori culture and place. In many instances, Māori collectives offer a powerful model for sustainable development, promoting cultural understanding and economic empowerment, while preserving the natural beauty of Aotearoa New Zealand.

It was estimated that Māori collectives added around $151 million in production GDP to Māori tourism, which was a 34 percent increase from $113 million in 2018 (BERL, 2025).[6]

5 We used Stats NZ's Tourism Satellite Accounts (TSA) to determine the total economic contribution from Māori tourism.

6 This estimate is likely conservative.

5 MĀORI ASSET BASE

Toitū te whenua, toitū te mana

The permanence of the land, the prestige endures.

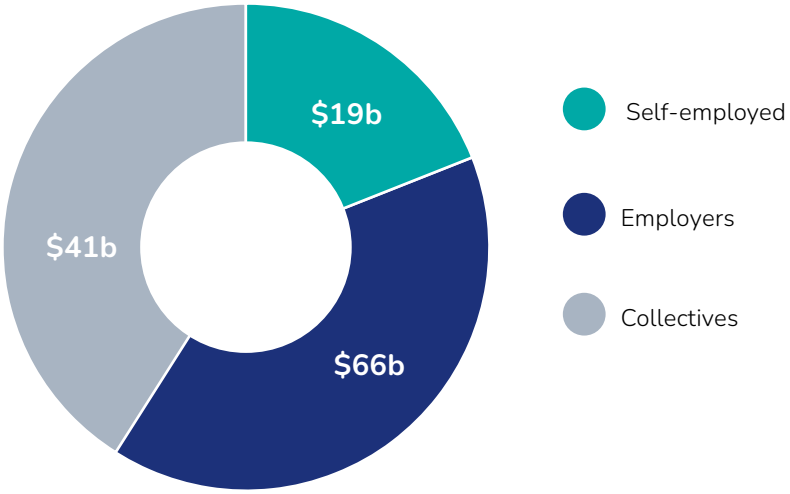
In 2023, the asset base within Te Ōhanga Māori was valued at $126 billion, up from $69 billion in 2018. The Māori asset base comprises:

$66 billion of assets in the businesses of Māori employers.

$41 billion of assets in trusts, incorporations, and other Māori entities (collectives).

$19 billion of assets in the businesses of Māori self employed.

Figure 6 Māori asset base by share of contribution, 2023



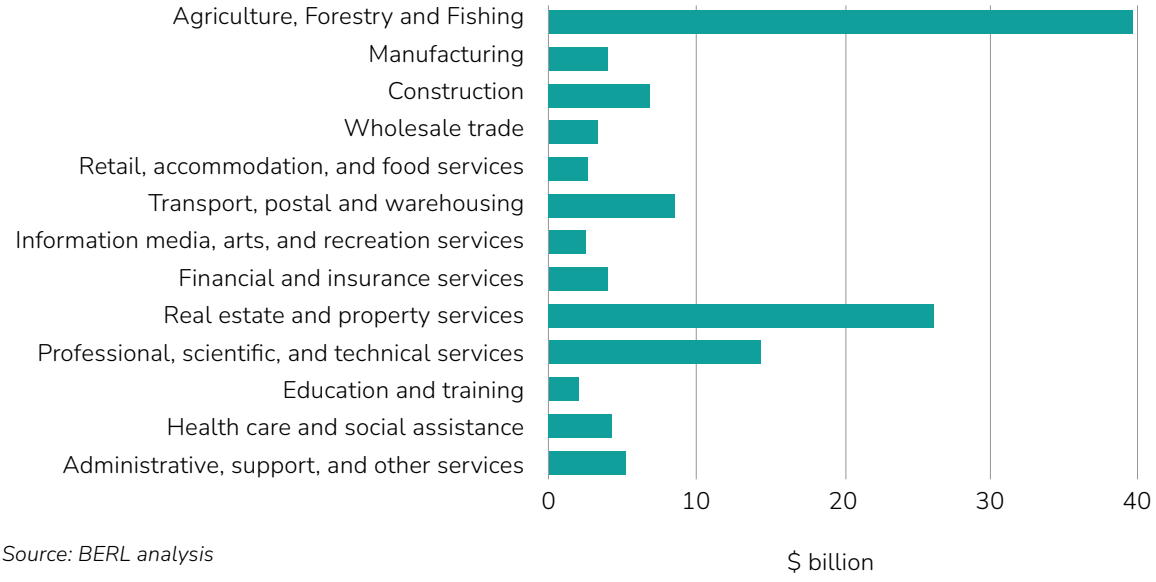
Source: BERL analysis

Although the Māori asset base has nearly doubled between 2018 and 2023, its share within the total Aotearoa New Zealand asset base increased more modestly, from 3.4 percent to 4.4 percent.

5.1 THE ASSET BASE IS SPREAD ACROSS A RANGE OF SECTORS

While agriculture, forestry, and fishing remain significant, the Māori asset base is diversifying, with real estate and property services experiencing substantial growth from $16.7 billion in 2018 to $26.3 billion in 2023 (Figure 7). The professional, scientific, and technical services industry is similarly a strong component of the asset base, with assets in this industry valued at $14.6 billion in 2023.

Figure 7 Māori asset base by industry, 2023

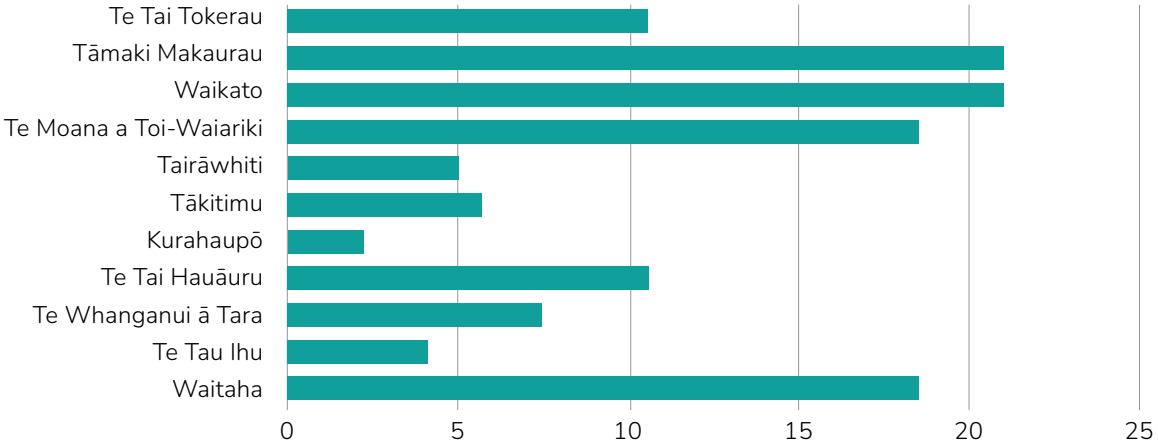


Source: BERL analysis

5.2 ASSETS SPREAD ACROSS THE ROHE

The rohe with the biggest share of the asset base is Tāmaki Makaurau, closely followed by Waikato (Figure 8). Waikato holds a substantial asset base in agriculture, forestry, and fishing, as well as property. Tāmaki Makaurau is unique in that it does not hold a significant agriculture, forestry, and fishing asset base, rather the rohe asset base is mainly concentrated in professional, scientific, and technical services and real estate and property.

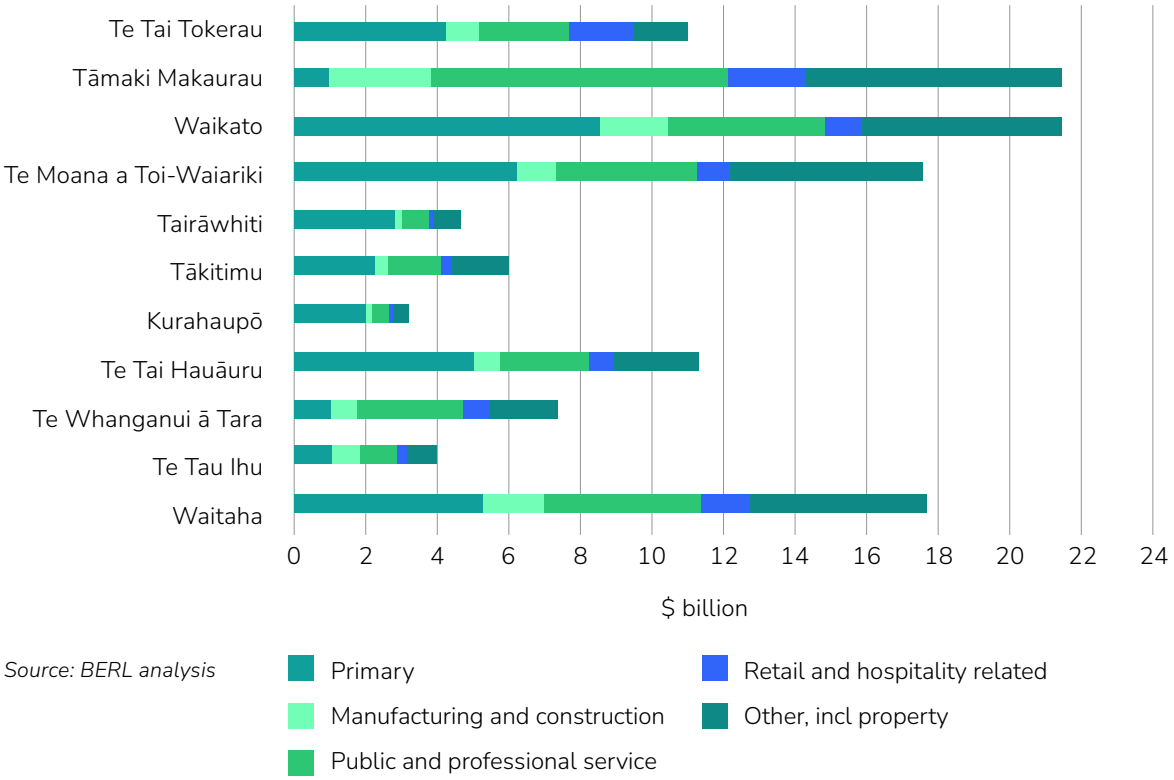
Figure 8 Māori asset base by rohe, 2023



Source: BERL analysis

The largest Share of primary sector assets were located in Waikato (Figure 9). Waikato is heavily involved in sheep and beef, dairy, and forestry, with the primary sector encompassing around 40 percent of the Waikato Māori asset base. The majority of these assets were collective assets. In contrast, other services, including property, is the dominant asset base category in Tāmaki Makaurau, and noticeably is also important in Te Moana a Toi-Waiariki, Waitaha, and Te Whanganui ā Tara. The asset base in the manufacturing and construction sector was most prominent in Tāmaki Makaurau and Waikato. Assets in the public and professional services sector were also most prominent in Tāmaki Makaurau, although their presence was also noticeable in Waikato, Te Whanganui ā Tara, Te Moana a Toi-Waiariki, and Waitaha.

Figure 9 Asset base breakdown by rohe, 2023



Source: BERL analysis

5.3 ASSET BASE BREAKDOWN BY EMPLOYERS, SELF-EMPLOYED, AND COLLECTIVES

Māori employers and collectives hold a substantial portion of the asset base in agriculture, forestry, and fishing. Employers hold $16.2 billion, while collectives hold $19 billion. For Māori employers, dairy farming accounts for the largest share of agriculture, forestry, and fishing assets with $6.2 billion. For collectives, sheep and beef farming represents the largest sector with $7.2 billion in assets (Table 1).

The biggest share of the assets is held by Māori employers and they are spread broadly across many sectors, but they do hold the majority of the assets in manufacturing, construction, wholesale trade, transport and postal services, and professional, scientific and technical services. Construction, transport, professional services, and trade and accommodation are characterised by smaller businesses with self-financed ownership. These include builders, plumbers, electricians, drivers, lawyers, accountants and other business consultancy services, along with hospitality establishments.

The rental, hiring and real estate sector is the biggest sector for self-employed ($6.4 billion) as well as for collectives ($12.4 billion).

Not all assets and economic activity can be counted, nor should it be counted. The Māori world view, Te Ao Māori, sees the world and everyone and everything within it as an interconnected whole, each affecting and affected by the other. Collective well-being is the core value of Te Ao Māori, achieved through a reciprocal system of kinship obligations which success is defined as relational balance between people, ecological and spiritual systems (Hēnare, 2014).

Table 1 Asset base for Māori self-employed, employers, and collectives, 2023

Sector ($m)	Self-employed	Employers	Collectives	Total
Kiwifruit growing	194	565	1,238	**1,997**
Other horticulture	119	777	796	**1,692**
Sheep and beef farming	1,679	3,444	7,211	**12,333**
Dairy	1,148	6,248	4,399	**11,794**
Forestry	873	2,519	2,898	**6,291**
Fishing	93	751	2,253	**3,097**
Other agriculture	390	1,901	200	**2,491**
Agriculture, forestry, and fishing	**4,495**	**16,205**	**18,994**	**39,694**
Mining	0	0	26	**26**
Manufacturing	611	2,476	944	**4,032**
Electricity, gas, water, and waste services	414	429	756	**1,599**
Construction	1,370	6,002	0	**7,373**
Wholesale trade	296	2,467	1	**2,765**
Retail trade	234	1,150	205	**1,589**
Accommodation and food services	139	614	47	**799**
Transport, postal, and warehousing	814	8,500	113	**9,426**
Information media and telecommunications	511	621	133	**1,265**
Financial and insurance services	525	2,294	1,600	**4,418**
Rental, hiring, and real estate services	6,366	7,583	12,396	**26,345**
Professional, scientific, and technical services	1,101	13,515	0	**14,617**
Administrative and support services	724	1,605	130	**2,460**
Public administration and safety	5	251	12	**269**
Education and training	67	275	1,009	**1,352**
Health care and social assistance	226	1,049	3,880	**5,155**
Arts and recreation services	273	433	217	**924**
Other services	450	987	227	**1,664**
Total	**18,624**	**66,456**	**40,691**	**125,771**

Source: BERL analysis

5.4 THE POWER OF THE COLLECTIVES

Ehara taku toa i te toa takitahi, engari he toa takitini

My success is not mine alone, but the success of many.

Māori collectives are often the leading entities representing different commercial interests for whānau, hapū, and iwi across Aotearoa New Zealand. Māori collectives are diverse and can include Māori-owned trusts, post-settlement governance entities (PSGEs) for iwi, as well as their commercial arms, and Māori authorities. Māori collectives take an intergenerational approach to their interests, managing and delivering economic opportunities for current and future generations.

THE VALUE OF ASSETS HELD BY COLLECTIVES NEARLY DOUBLED BETWEEN 2018 AND 2023

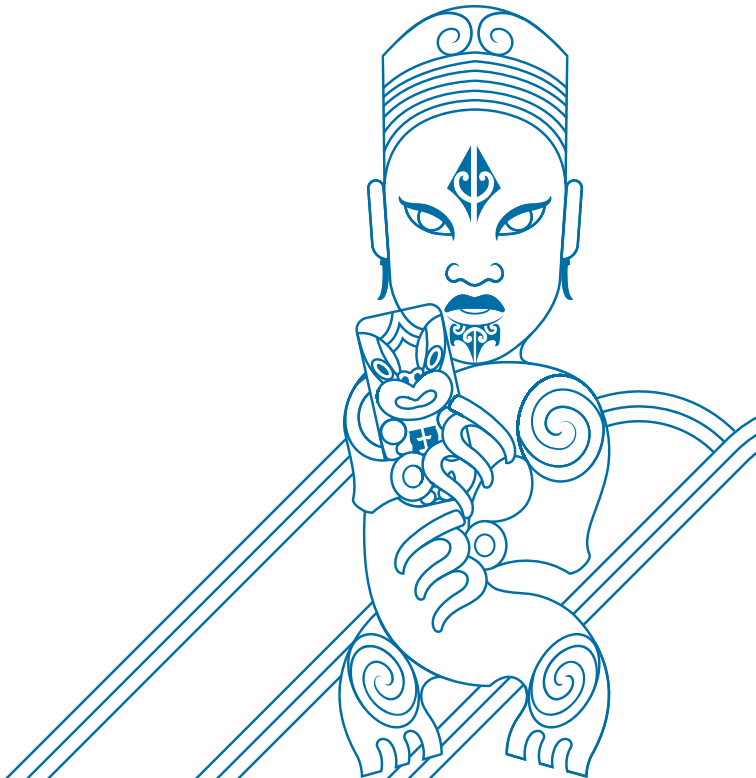
In 2023, Māori collectives were estimated to hold an asset base valued at $41 billion, representing nearly a third of the total asset base in Te Ōhanga Māori. This represents a significant increase in the value of assets managed by Māori collectives between 2018 and 2023, nearly doubling from $21 billion to $41 billion.

Collectives hold a substantial sum of $3.6 billion in term deposits and portfolio funding, which are categorised as non-productive assets. Collectives had also distributed about $96 million in scholarships and grants to whānau.

Te Tiriti settlements to date comprise approximately $2.6 billion (January 2023) in cash and assets transferred from the Crown to iwi over the past 25 years. The combination of financial, natural, and cultural assets has been used by iwi to (re-)establish operations based on whenua Māori, to leverage new business ventures, and to develop sustainable enterprises across a range of sectors and services. It is important, however, to note that many businesses and enterprises, including many whānau and hapū trusts, were in existence prior to Te Tiriti settlements and indeed continue to exist.

The land and water have long been fundamental to Māori identity and culture, deeply rooted in whakapapa with a long-term, intergenerational view ingrained in the protection, restoration, and management of whenua Māori. Traditional Māori land 'ownership' was not of the land itself, rather the different resources that could be created from it (Reid, J, 2011).

The 'value' of whenua Māori in Te Ao Māori extends economic profitability, encompassing the sustainable management of the environment and the importance of providing and upholding cultural connectedness for present generations, and both past and future generations. It has previously been defined as "any natural resource, area, place, or thing (tangible or intangible) which is of physical, economic, social, cultural, historic, and/or spiritual significance to tangata whenua" (Harmsworth, G, 1997). As such, we recognise that in Te Ao Māori, true value cannot be reflected on a balance sheet or in numerical values



TE RŪNANGA O TOA RANGATIRA CASE STUDY

Ngāti Toa Rangatira, an iwi based in the Porirua and Te Whanganui a Tara takiwā, exemplifies how Māori values can be seamlessly integrated into modern business practices. Te Rūnanga o Toa Rangatira, established to enhance the well-being and prosperity of its people, manages a wide range of mahi including political interests, Treaty claims, fisheries, health services, and environmental kaitiakitanga.

The iwi business strategy, deeply rooted in Māori identity, prioritises community well-being over profit. Helmut Modlik (Tumu Whakarae – CEO) says that their focus is not on making money, but on "enhancing the well-being, prosperity, and mana of our people and the community, the manuhiri who live in our community, and particularly those who need us most".

Ngāti Toa places strong emphasis on te taiao and kaitiakitanga, acting as responsible guardians of their natural resources. Their investments in water infrastructure and environmental projects are driven by the need to heal their whenua and improve community health. Helmut explains this approach as "applying traditional Māori values in a contemporary setting".

The iwi strategy for managing physical and financial capital centres on creating intergenerational benefits. They invest in enterprises delivering essential services such as health, housing, and education. Helmut shares, "We focus on long-term benefits rather than short-term gains, ensuring that our investments contribute to the sustainable development of our community".

In the past three years, Ngāti Toa has grown its total assets from $220 million to $850 million and increased its staff from 120 to over 600. Human capital development is a key focus, with investments in mātauranga and wairuatanga. The iwi provides opportunities for personal and professional growth, partnering with educational institutions to ensure access to quality education and training. Their approach is holistic, considering not just skills and knowledge, but also well-being and spiritual growth.

Ngāti Toa business operations are deeply rooted in social and cultural values, with whanaungatanga, tikanga, kawa, and manaakitanga integral to their approach. These values guide their interactions in all relationships, ensuring respectful and culturally appropriate business practices.

The COVID-19 pandemic presented significant challenges, but Ngāti Toa responded swiftly by providing comprehensive support to their community. This included health services, food distribution, and pastoral care. Boyd Scirkovich (Pou Ōhanga – Chief Economic Development & Investment Officer) notes, "We focused on building local capacity and ensuring that our people had the resources and support they needed to navigate the challenges of the pandemic, where people first decisions are at the heart of all decision making".

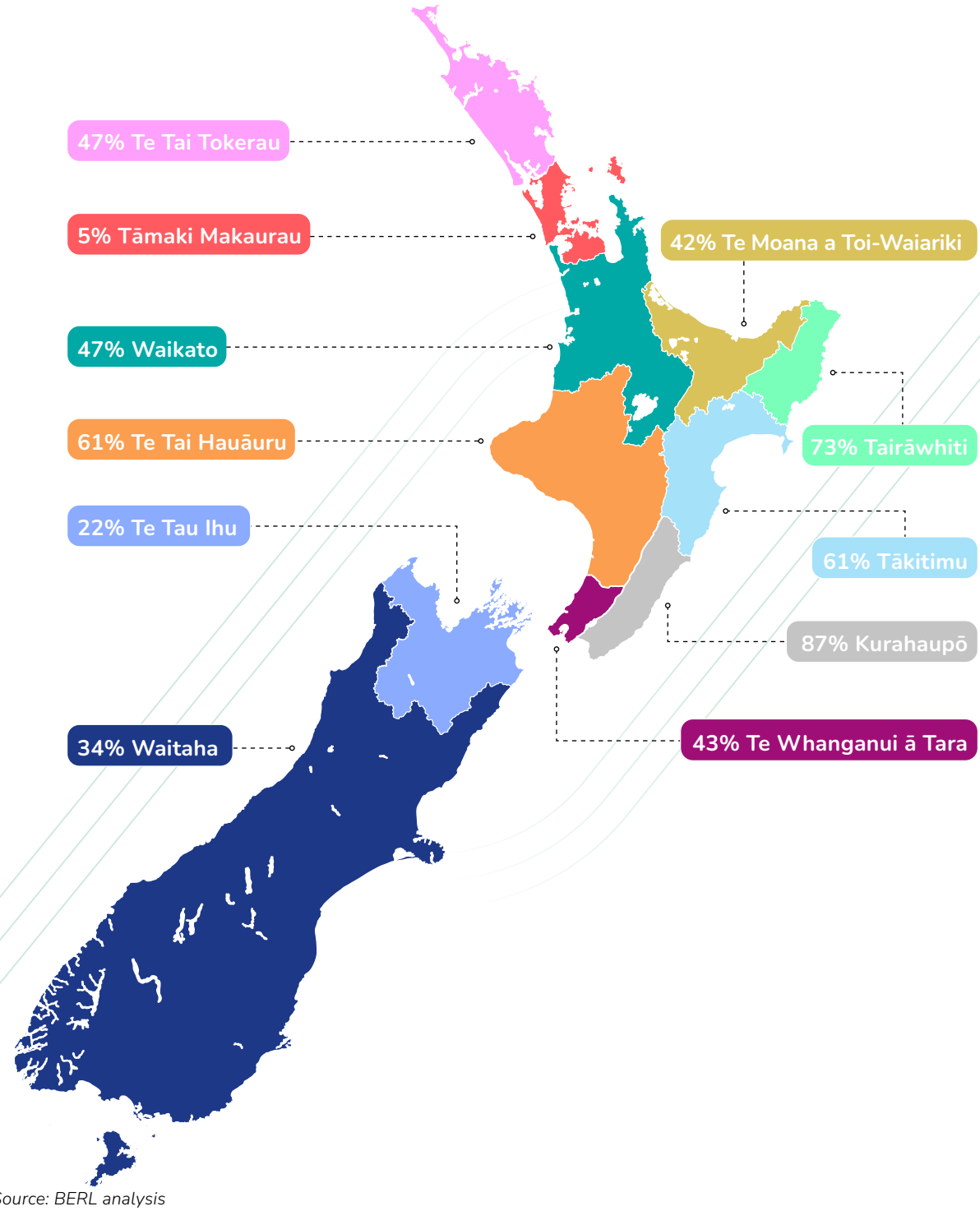
The Ngāti Toa approach to business demonstrates how Māori values can create a thriving iwi economy that supports the well-being and prosperity of its people. By focusing on long-term, sustainable development, Ngāti Toa is not only preserving their cultural heritage but also creating a brighter future for their iwi and wider community.

MĀORI COLLECTIVES ARE THE DRIVING FORCE OF PRIMARY INDUSTRIES IN TE ŌHANGA MĀORI

In 2023 Māori collectives owned around half of all agriculture, forestry, and fishing assets in Te Ōhanga Māori, totaling $19 billion.

These agriculture, forestry, and fishing assets are spread right across Aotearoa New Zealand, although the proportion of these assets, relative to their total assets, varies from rohe to rohe. Figure 10 provides good evidence to the diversity of collective's asset bases from rohe to rohe. While there was a high concentration of primary sector assets held by Māori collectives in Kurahaupō (87 percent), on the contrary, primary sector assets only accounted for five percent of Māori collective's assets in Tāmaki Makaurau.

Figure 10 Agriculture, forestry, and fishing assets as a share of collective assets by rohe, 2023

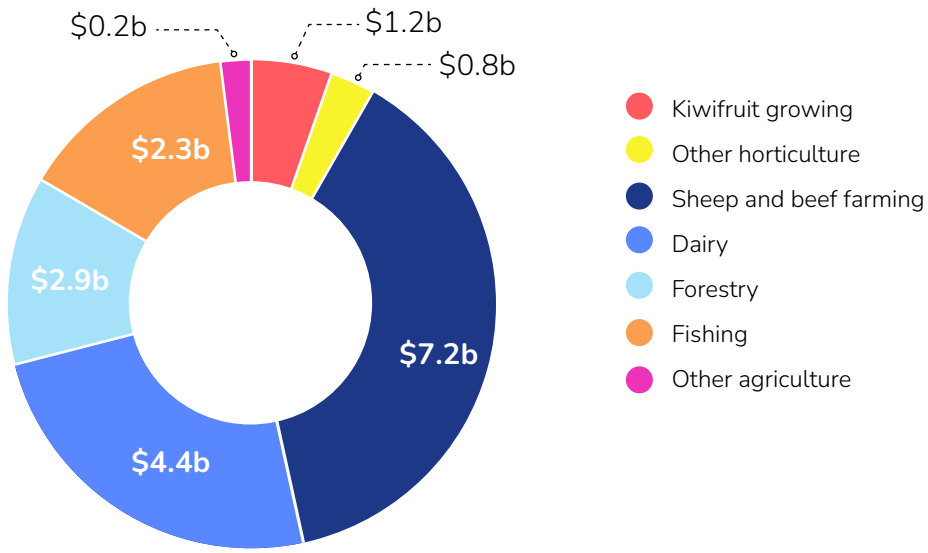


Source: BERL analysis

MĀORI COLLECTIVES HOLD A RANGE OF AGRICULTURE, FORESTRY, AND FISHING ASSETS

The biggest share of agriculture, forestry, and fishing assets is owned within sheep and beef farming, followed by dairy (Figure 11).

Figure 11 Primary industries asset base for collectives, 2023



Source: BERL analysis

The total Māori asset base in fishing was $3.1 billion, with 73 percent of this asset base owned by the collectives. A large portion of collectives own the assets, but they are not involved in fisheries processing, with companies such as Moana undertaking this activity. Māori collectives notably increased their ownership of horticulture assets, doubling their value from $659 million in 2018 to $2 billion in 2023, split between kiwifruit and other horticulture crops such as apples.

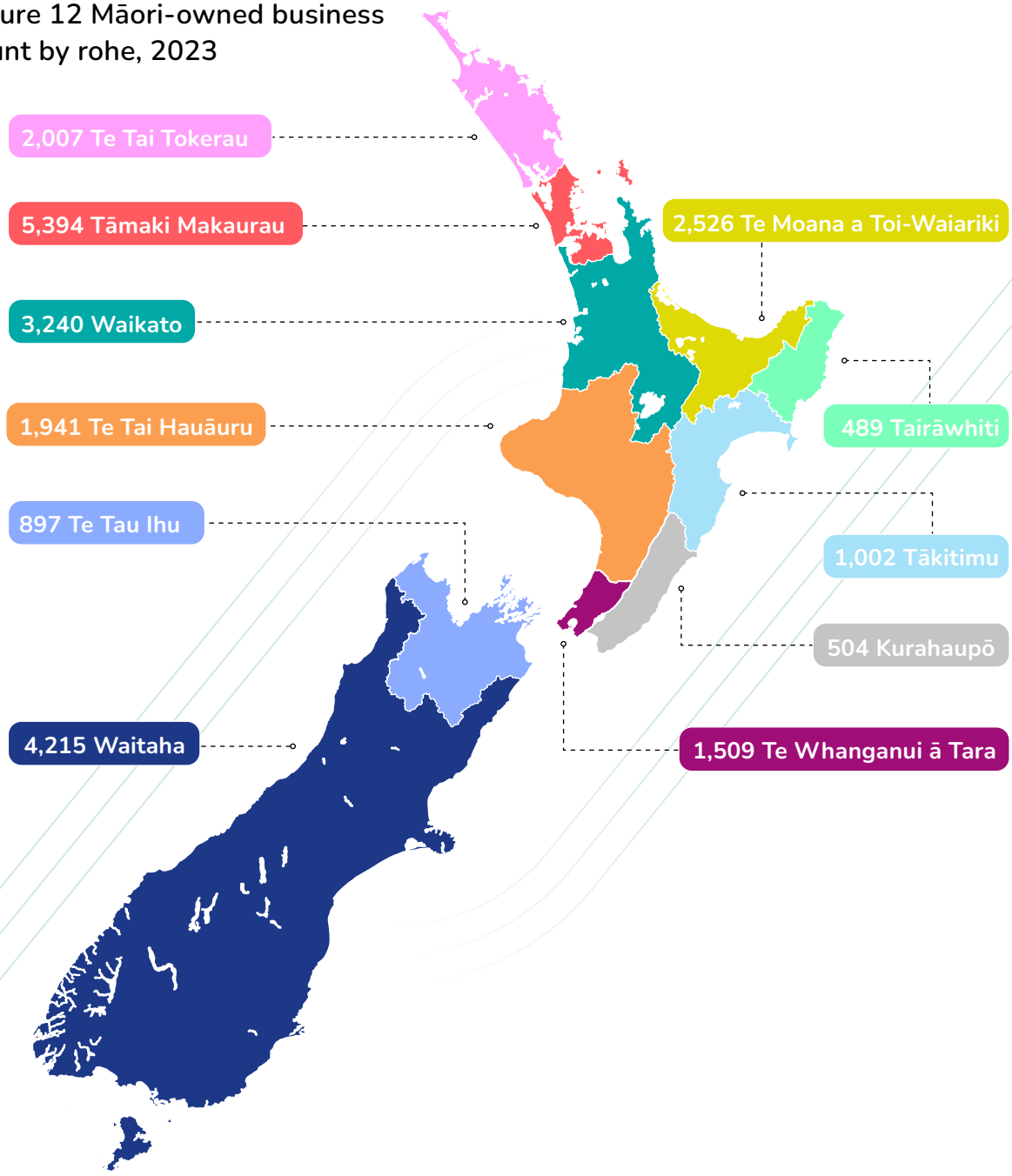
6 MĀORI-OWNED BUSINESSES

He kai kei aku ringa

There is food at the end of my hands.

This section examines the size and contribution of Māori-owned businesses within Te Ōhanga Māori. It builds on the work that has been undertaken by Te Puni Kōkiri through Te Matapaeroa to provide a consistent view of Māori-owned businesses. This is the first time Māori-owned businesses have been specifically analysed in Te Ōhanga Māori, providing a baseline for future comparisons.

Figure 12 Māori-owned business count by rohe, 2023



Source: BERL analysis, Te Matapaeroa

In 2023, there were nearly 24,000 Māori-owned businesses in Aotearoa New Zealand, up from around 19,200 Māori-owned businesses in 2018.[7] The largest number of businesses was in Tāmaki Makaurau at 5,394, followed closely by Waitaha with 4,215 Māori-owned businesses.

The largest number of Māori-owned businesses in 2023 were in construction (5,865); agriculture, forestry, and fishing (4,908); and professional, scientific, and technical services (3,117) (Table 2).

Table 2 Māori-owned businesses by sector, 2023

Industry, 2023	Māori-owned businesses
Agriculture, forestry, and fishing	4,908
Manufacturing	1,008
Construction	5,865
Wholesale trade	474
Retail, accommodation, and food services	1,614
Transport, postal, and warehousing	858
Information media, arts, and recreation services	699
Financial and insurance services	390
Real estate and property services	1,620
Professional, scientific, and technical services	3,117
Education and training	321
Health care and social assistance	630
Administrative, support, and other services	2,238
Not elsewhere included	6
Total	**23,748**

Source: BERL analysis, Te Matapaeroa

Māori entrepreneurs as actors within this economy are guided by tikanga Māori, kaupapa Māori, mātauranga Māori, and te reo Māori in their participation in the Aotearoa New Zealand economy. Tikanga Māori comprising values of mana, mauri, tapu and noa, hau, utu—is used to achieve relational balance, in effect, well-being, in multiple contexts, including in business. Research suggests that Māori enterprises are indeed intentionally applying Māori values to achieve multidimensional well-being—social, cultural, economic, environmental, and spiritual, to the extent that business is a means to these ends. They are using values and customs like tauutuutu (Reid et al., 2021) and manahau (Mika et al., 2022) to implement these values.

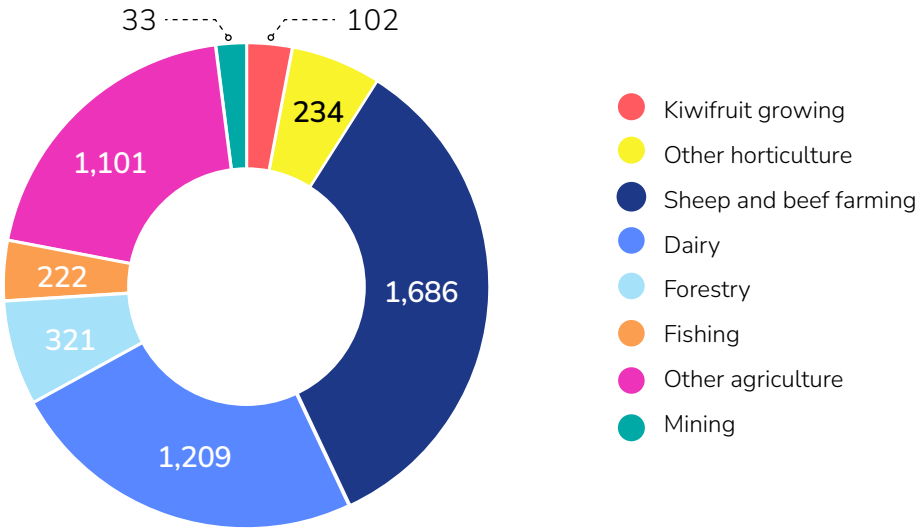
7 In the past, the lack of a robust methodology to identify private businesses as Māori-owned impacted our ability to robustly estimate the total asset base of private Māori businesses. TPK developed an approach that leveraged business tax records within Stats NZ's IDI using payments from businesses to individual shareholders (please see Appendix A for a detailed description of the methodology).

6.1 HIGH REPRESENTATION OF MĀORI-OWNED BUSINESSES IN PRIMARY SECTOR

The primary industries captured within agriculture, forestry, and fishing accounted for 4,908 Māori-owned businesses – the second largest industry. Around 1,700 Māori-owned businesses in the primary industries operated sheep and beef farms, followed by dairy (1,209 Māori-owned businesses) and other agriculture (1,101 Māori-owned businesses) (Figure 13).[8]

The majority of Māori-owned businesses in agriculture, forestry, and fishing were located in Waitaha (1,107 Māori-owned businesses) and Waikato (904 Māori-owned businesses).

Figure 13 Māori-owned businesses in agriculture, forestry, and fishing, 2023



Source: BERL analysis, Te Matapaeroa

Māori-owned businesses frequently leverage whenua to generate commercial opportunities, integrating Te Ao Māori principles into their practices. Māori-owned businesses often prioritise kaitiakitanga, the guardianship and sustainable management of natural resources. This translates to practices that minimise environmental impact, such as organic or regenerative farming, reforestation initiatives, and eco-tourism ventures that minimise disturbance to the natural environment.

6.2 STRONG GROWTH IN MĀORI-OWNED CONSTRUCTION BUSINESSES

There has been significant growth for Māori-owned businesses in the construction sector. This is also closely connected to the economic conditions in Aotearoa New Zealand. After a dip during 2021, the construction sector saw robust growth in the following years. In 2023, there were 5,865 Māori-owned businesses in the construction sector (Table 2), increasing from 4,251 in 2013.

The construction sector is currently facing significant economic challenges, stagnant property values, and interest rates have been at their highest point in over a decade. Although the construction industry is accustomed to cyclical downturns, this period presents considerable difficulty for the many businesses operating within it. Many construction enterprises are small, with 95 percent of construction companies employing fewer than ten people, making them vulnerable to market fluctuations.

8 Other agriculture includes mixed livestock, pig or deer farming, and agriculture support services, such as harvesting and plantation.

7 MĀORI EXPORTS

Tawhiti rawa tō tatou haerenga atu te kore haere tonu

We have come too far not to go further.

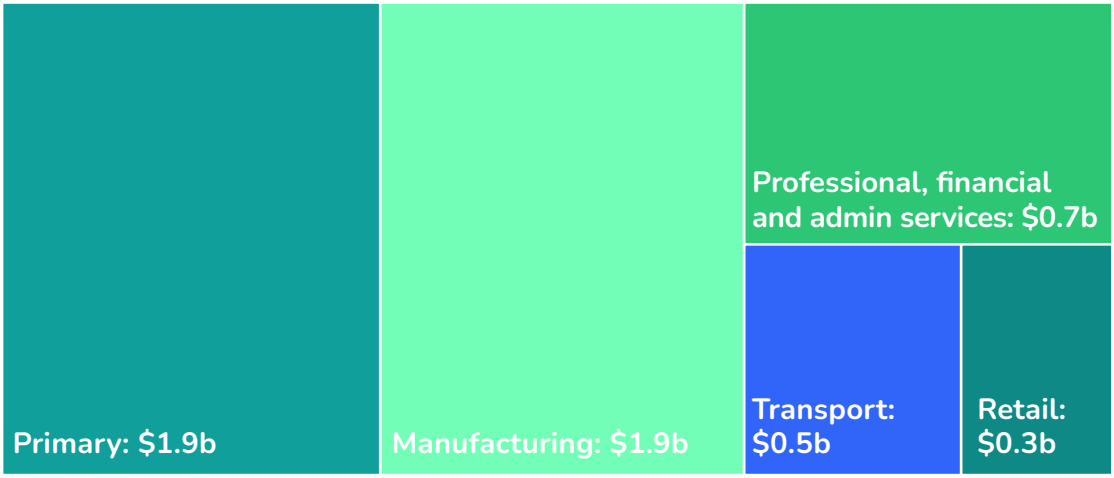
This section explores the role and share of Māori exports in the Aotearoa New Zealand economy. We provide data and information from multiple sources, including analysis of Māori-owned businesses and Stats NZ export data on Māori authorities.

While accurately determining the Māori export sector's size presents challenges, we estimate that Māori exports contribute approximately $5.2 billion to Aotearoa New Zealand's total exports, constituting roughly 5.6 percent of the national export total.[9]

7.1 EXPORTERS WERE HIGHLY CONCENTRATED IN THE PRIMARY SECTOR

Māori exports were dominated by the primary sector in 2023, along with manufacturing exports, with estimated exports from both industries valued at $1.9 billion (Figure 14). About $1.1 billion of the $1.9 billion from manufacturing was related to the primary sector, including dairy and meat processing, other food manufacturing, as well as wood and paper manufacturing.

Figure 14 Māori exports per sector, 2023[10]



Source: BERL analysis

9 Our methodology for creating this estimate is included in Appendix A. We acknowledge that more research is needed to establish a more detailed evidence base of Māori exports in Aotearoa New Zealand.

10 See Appendix A for methodology.

Māori businesses are becoming increasingly more involved in exporting, both directly and indirectly. Māori businesses have a significant global reach, exporting a diverse range of goods and services across various sectors. Integral to the success of the Māori exporting economy is the participation at various levels in the supply chain, with many Māori businesses not exporting directly but indirectly contributing to exports as a component of an exporter's supply chain.

Further research is needed to capture the full picture, as the only data collected by Stats NZ on Māori exports was on goods exported by a limited number of Māori authorities and a limited selection of businesses (discussed in section 7.2 and 7.3).[11] The limited data paints an incomplete picture of the true economic contribution of Māori businesses to our exports.

7.2 EXPORTS OF GOODS BY MĀORI AUTHORITIES

Based on Stats NZ data, Māori authorities exported $816 million worth of goods in 2023 (Stats NZ, 2024).[12] It is important to note that this is only goods and does not include services, and largely consisted of kaimoana and dairy products. Exports to China made up 29 percent of Māori authority exports, down from 33 percent in the previous year. Exports to countries other than China and the United States of America (USA) made up 66 percent of Māori authority exports, up from 62 percent in 2022. It is likely that this indicates Māori authorities are continuing to diversify their export markets.

7.3 EXPORTS OF GOODS BY MĀORI BUSINESSES

Māori businesses identified by Stats NZ exported a total of $534 million of goods in 2023.[13] Of these goods exported by Māori businesses, $42 million (eight percent) went to the USA and $40 million (seven percent) went to Australia.

These figures highlight the growing importance of Māori exports in Aotearoa New Zealand's trade landscape. With continued diversification and a strong global reputation, Māori enterprises are poised for an even greater contribution to the national economy.

11 This data is available through Stats NZ's Tatauranga Umanga Māori statistics releases.

12 Stats NZ identifies a Māori authority as a business with a collectively managed asset, which uses current Inland Revenue eligibility criteria to be a Māori authority (irrespective of whether the enterprise elects to be a Māori authority for tax purposes), a commercial business that supports the Māori authority's business and social activities, and sustains or builds a Māori authority's asset base, or businesses that are more than 50 percent owned by a Māori authority.

13 Stats NZ identifies Māori businesses that have Māori ownership, have self-identified as a Māori business, are economically significant, and are not Māori authorities.

ŌKU CASE STUDY

Founded by Helen Paul Smith (Tapuika and Ngāti Moko) and Scott Smith in 2010, ŌKU specialises in herbal teas, topical balms, and wellness tonics derived from native Aotearoa plants. The herbal company prioritises sustainability and traditional practices in sourcing wildcrafted herbs. Their mission is to share indigenous rākau and te reo Māori with the world, ensuring the ancient wisdom of tīpuna is passed on to new generations.

Business strategy and operations are deeply rooted in Helen's heritage and whakapapa, influencing every aspect of the company's strategy. Being Māori-owned is a driving factor in looking beyond financials as a measure of success. In many business decisions, Helen feels the wairua of her tīpuna guiding her. Helen says, "We have a Mātauranga Māori foundation to ŌKU, and we have a quadruple bottom line." This approach ensures the business focuses on profitability, community well-being, environmental sustainability, and future generations.

ŌKU is B Corp certified, and Helen found that integrating Mātauranga Māori principles made the B Corp process smoother, as these principles align with B Corp standards of environmental and social responsibility. The company is also part of a Māori B Corp collective, aiming to leverage the B Corp certification for Indigenous people globally.

Guided by the principles of kaitiakitanga, ŌKU uses a giant septic worm tank to filter waste, has solar panels on their roof, and collects rainwater. Additionally, all packaging is plastic-free. Karakia are performed before and after hui, kai, and harvesting, ensuring the spiritual well-being of both the land and people. Harvesting is done sustainably, with leftover rongoā material returned to Papatūānuku.

The role of social and cultural capital in business operations is significant, encompassing whanaungatanga, manaakitanga, mātauranga, and wairuatanga. These values are integrated into the company's interactions with customers, suppliers, and the broader community, strengthening relationships and promoting a sense of shared responsibility and mutual respect.

While the COVID-19 pandemic impacted ŌKU, the company adapted by increasing sales of their chest and immune elixirs through pharmacies. This resilience highlights the importance of integrating Māori values for sustainable business success.

ŌKU is dedicated to the preservation and promotion of rongoā Māori by making traditional healing remedies accessible. Helen gives community educational talks on rongoā and the importance of planting native plants. Partnerships with iwi landowners support regenerative planting projects and sustainable harvesting. These efforts benefit the environment and support local Māori communities by creating opportunities for collaboration and knowledge sharing.

Support from Poutama, Whāriki, NZ Māori Tourism, Māori Women's Development Inc., NZTE Māori Team, the Asia New Zealand Foundation, Callaghan Innovations, and Te Puni Kōkiri has been pivotal. NZTE Māori Team enables ŌKU to operate in a Mātauranga Māori space while providing ongoing business support and aiding international growth. Participation in the Tupu Accelerator Programme provided valuable mentorship and growth strategies while honouring cultural values. ŌKU has seen impressive growth, driven by the rising demand for authentic Māori products. Currently exporting to Singapore and the Middle East, ŌKU is focused on launching into Australia for 2025.

8 POPULATION AND WORKFORCE

Mā te marama ka matau, mā te matau ka oraa mōhio, mā te mōhio ka kitea he oranga

By seeing, understanding is gained; by understanding, wellness is found.

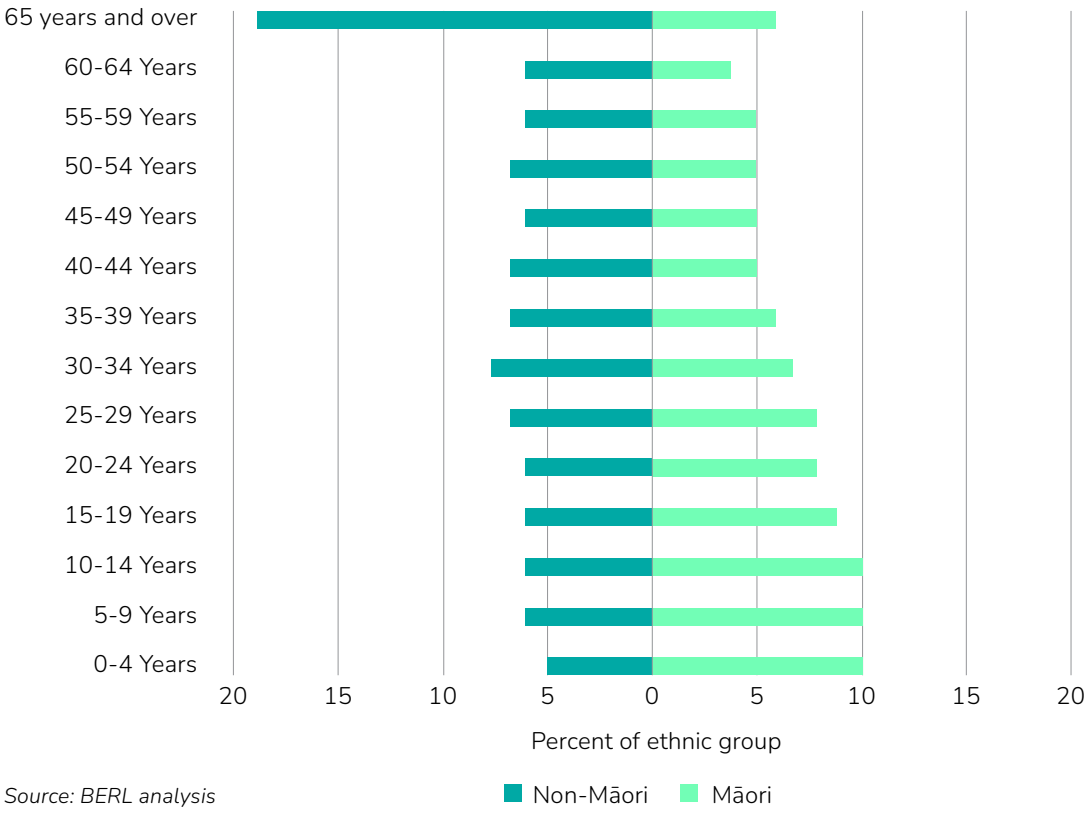
The focus of this section is to understand the impact of the growing Māori population. A central and consistent theme throughout each iteration of Te Ōhanga Māori emphasises the inherent strength and potential within the young and rapidly expanding Māori population.

8.1 STRONG POPULATION GROWTH

The Māori population totalled 887,500 in 2023, growing by around 112,000 people since 2018 (a 14 percent increase). Māori represent 18 percent of the population in Aotearoa New Zealand (up from 17 percent in 2018 and 14 percent in 2013) and have been a key factor in the nation's fast-changing demographics, along with the Pacific Peoples and Asian populations.

The Māori population is structurally young and continues to be fast-growing, in contrast to non-Māori in Aotearoa New Zealand. Figure 15 clearly presents the distinct difference in the age structure of the Māori population compared to the rest of Aotearoa New Zealand.

Figure 15 Age group distribution for Māori and non-Māori, 2023



Source: BERL analysis

In 2023, 55 percent of the Māori population was under the age of 30, compared to only 35 percent of the non-Māori population. Furthermore, Māori represent just over a quarter of all 15- to 19-year-olds and 23 percent of all 20- to 24-year-olds.

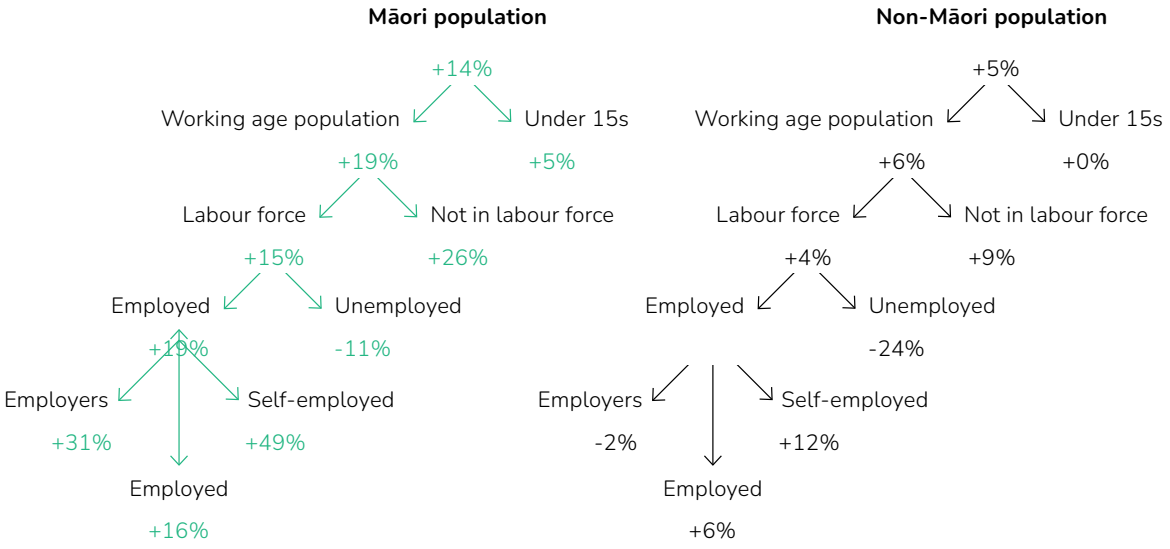
MOVING ACROSS THE DITCH

In parallel with the continued growth of the Māori population in Aotearoa New Zealand, large numbers of Māori continue to move to Australia as well. The 2021 Australian Census revealed a significant increase in the Māori population, with 170,000 individuals identifying as Māori. This represents a substantial 20 percent growth compared to the 2016 Census, where the Māori population was just over 142,000 (Australian Bureau of Statistics, 2021).

8.2 NOTABLE GROWTH OF THE MĀORI WORKFORCE

The past decade has witnessed a notable increase in Māori workforce participation in Aotearoa New Zealand, spanning from employees to entrepreneurs. This upward trajectory is expected to continue in the next decade.

Figure 16 Change in population and employment, 2018 to 2023



Source: BERL analysis

MĀORI ARE A GROWING PROPORTION OF THE WORKFORCE

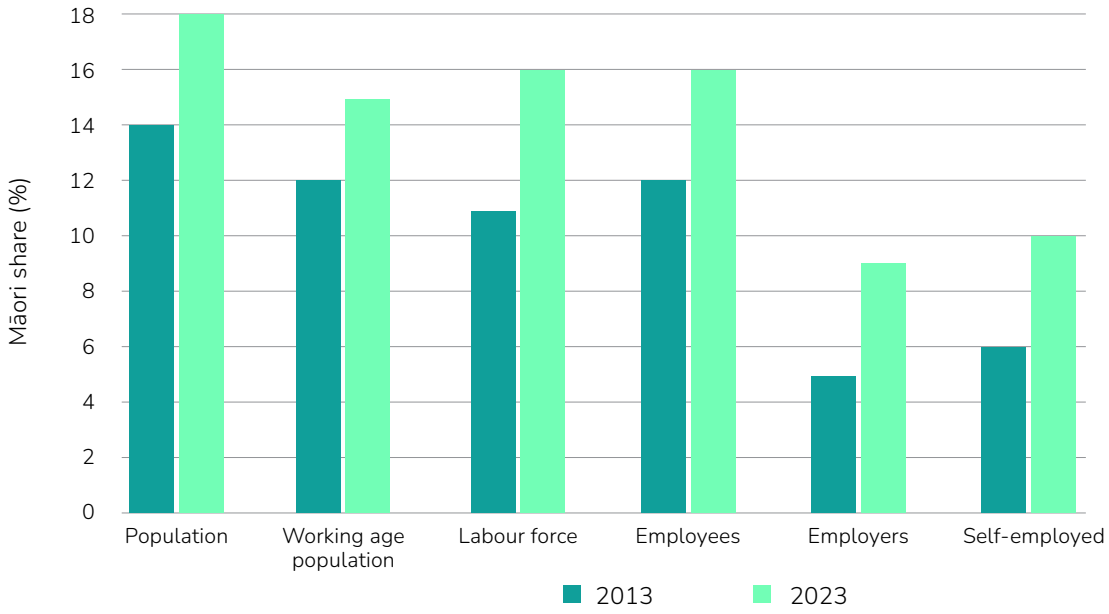
Between 2018 and 2023, the Māori working-age population in Aotearoa New Zealand surged by nearly 100,000, reaching 625,000. This represents 14 percent of the total working-age population. In 2023, 391,000 Māori were employed, an increase from 329,000 in 2018.

Figure 16 shows the number of Māori under 15 years old grew five percent compared to zero percent growth in the same age group for non-Māori. The overall working age population of Māori increased by 19 percent compared to only six percent for non-Māori. The working age population captures all those aged 15 years or over. It is the total of the number employed (19 percent growth), the number unemployed (11 percent decline), and the number not in the labour force (26 percent growth). In comparison, the non-Māori population grew by five percent, the working age population by six percent, and the labour force by four percent.

The increase in rangatahi Māori is vital in considering the future workforce of Aotearoa New Zealand, and for ensuring the current education and training interventions are fit-for-purpose. Research on the education outcomes for rangatahi Māori showed that systemic bias is embedding inequality (BERL, 2019). Focusing on improving rangatahi Māori skill levels through more effective secondary and tertiary education, and better completion of trades training, is imperative to future proofing for Māori and for Aotearoa.

Figure 17 provides further illustration of the increasing representation of Māori within key sectors of the workforce, revealing the extent of growth through the decade between 2013 and 2023. The Māori workforce experienced substantial growth between 2013 and 2023. The total number of Māori employed, covering employees, employers, the self-employed, and unpaid workers, reached 391,000 in 2023, a significant 74 percent increase from 224,000 in 2013. This growth is primarily attributed to a substantial increase in Māori employees (up 156,000 or 82 percent), alongside notable increases in Māori employers (up 6,100 or 91 percent) and the self-employed (up 12,800 or 86 percent).

Figure 17 Māori share of the workforce, 2013 to 2023



Source: BERL analysis

MĀORI WILL BE A SIGNIFICANT PART OF OUR FUTURE WORKFORCE

The young Māori population translates to a larger pool of potential workers entering the labour market over the next two decades. This influx of young talent can address potential future labour shortages and contribute to sustained economic growth. A youthful Māori workforce can bring a unique blend of cultural perspectives and innovative thinking, driving dynamism and progress across various sectors of the economy.

8.3 EMPLOYMENT

The Māori workforce has evolved substantially, expanding across a wider range of industries (Table 3). While traditionally there was strong representation in primary industries, Māori workers are increasingly moving into knowledge-intensive sectors. There was notable growth in professional fields, including scientific and technical services, as well as increased participation in public administration and safety roles.

Table 3 Māori in the workforce by sector, 2023[14]

Industry, 2023	Number employed
Kiwifruit growing	900
Other horticulture	2,385
Sheep and beef farming	3,543
Dairy	4,035
Forestry	2,100
Fishing	1,188
Other agriculture	7,317
Agriculture, forestry, and fishing	**21,468**
Mining	1,098
Dairy processing	2,580
Meat processing	8,637
Other food manufacturing	5,364
Wood and paper manufacturing	5,241
Fabricated metal products	10,710
Other manufacturing	6,873
Manufacturing	**39,405**
Electricity, gas, water, and waste services	4,059
Construction	45,597
Wholesale trade	15,678
Retail trade	33,282
Accommodation and food services	24,390
Transport, postal, and warehousing	18,726
Information media and telecommunications	4,128
Financial and insurance services	7,248
Rental, hiring, and real estate services	7,203
Professional, scientific, and technical services	23,238
Administrative and support services	18,219
Public administration and safety	29,772
Education and training	33,597
Health care and social assistance	36,702
Other services	15,738
Arts and recreation services	7,053
Total	**386,601**

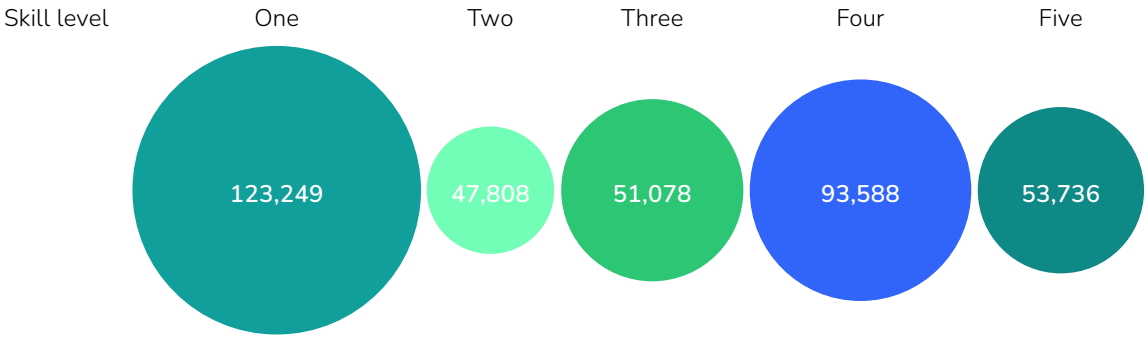
Source: BERL analysis

14 This table does not include individuals that were recorded as unpaid family workers in Census 2023. Therefore, the total slightly differs from the total employed Māori discussed previously.

MĀORI ARE SHIFTING INTO MORE HIGH-SKILLED EMPLOYMENT

To fully understand the growth in Māori employment, we need to look beyond the overall increase in positions. While there has been substantial growth in the number of Māori working as employees, employers, and self-employed professionals in skilled roles, examining the specific skill patterns and directions of this growth reveals a more complete story.

Figure 18 Total number per skill level of the Māori workforce, 2023[15]



Skill level one is the highest skill level and skill level five is the lowest skill level.

Source: BERL analysis

There has been significant growth in the number of high-skilled Māori in the workforce (Figure 18). It has grown from 119,100 in 2018 to 171,100 in 2023.[16] Since measuring the skill levels of the workforce in 2006, it is the first time in a Te Ōhanga Māori iteration that there were more high-skilled Māori employees than low-skilled Māori employees.

MĀORI EMPLOYERS ARE MORE LIKELY TO BE HIGH SKILLED

In 2023, 69 percent of Māori employers were high skilled, compared to 56 percent of self-employed, and 45 percent of employees (Figure 19).[17]

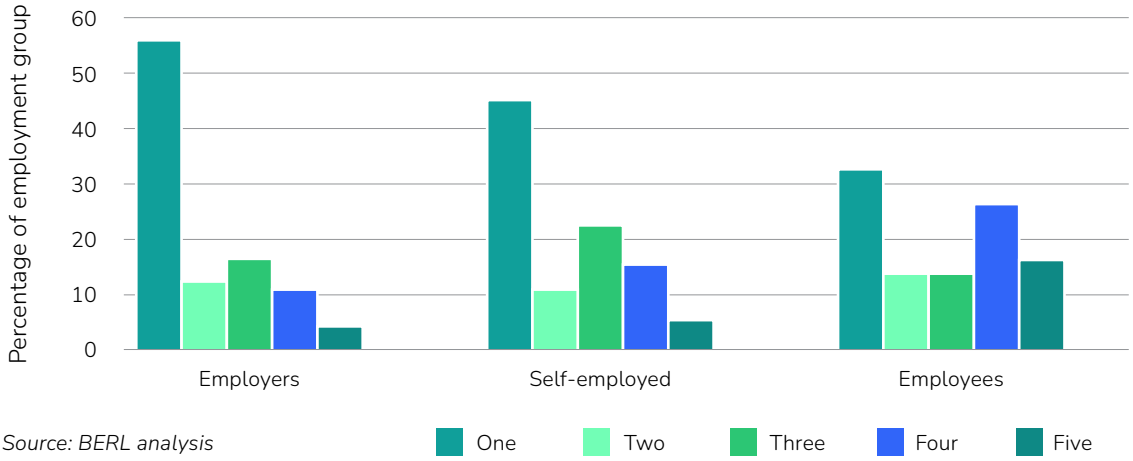
15 This total does not include individuals that are employed but did not state occupation in the Census 2023. Consequently, numbers presented may slightly differ to that presented in Table 3.

16 'High-skilled' refers to individuals in the workforce with a skill level of one or two, 'skilled' refers to individuals with a skill level of three, and 'low-skilled' refers to individuals with a skill level of four and five.

17 'High-skilled' includes Māori individuals with a skill level of one or two.

Figure 19 Skill level of Māori employers, self-employed, and employees, 2023

Skill level: One = high-skill

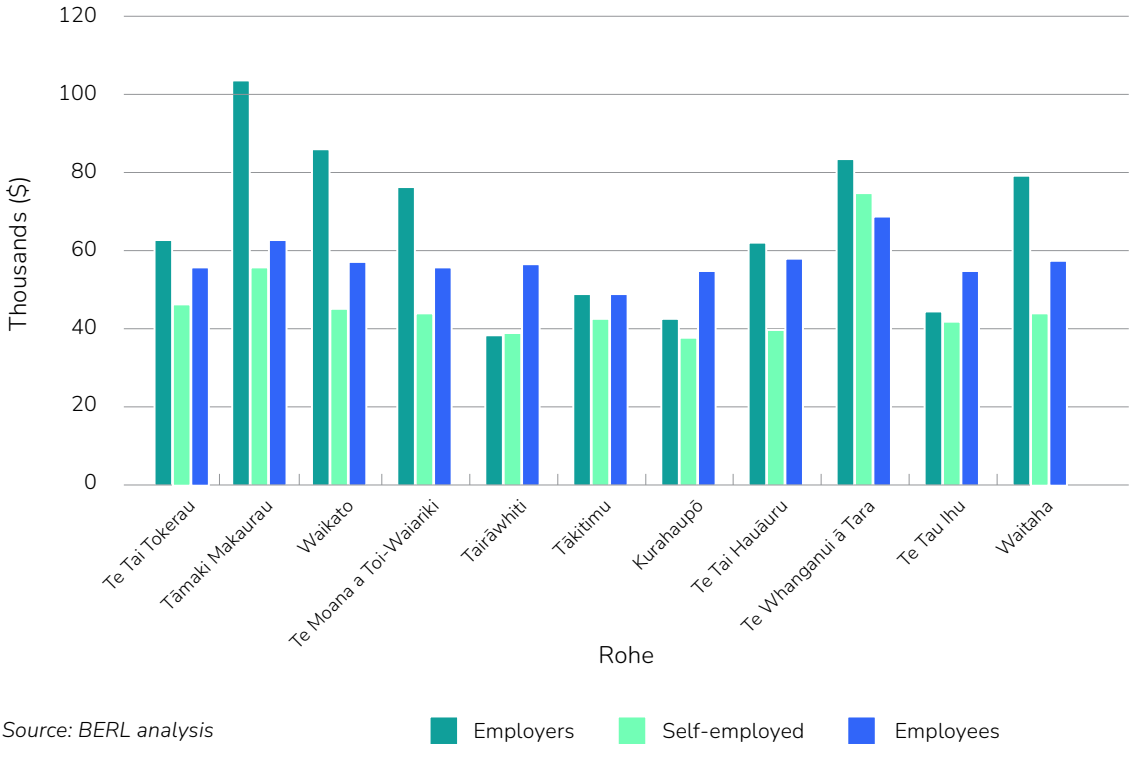


Source: BERL analysis

MĀORI EMPLOYERS TEND TO EARN MORE

There is generally a correlation between skill level and earning potential. Across most of the rohe, Māori employers, a high proportion being high-skilled employers, earned significantly more (Figure 20). The highest earners were Māori employers in Tāmaki Makaurau ($103,800). The highest-paid Māori employees ($67,000) and self-employed ($72,000) were in Te Whanganui ā Tara. This can be partially explained by the predominance of employment in the public administration and professional services sectors.

Figure 20 Average income by employment status by rohe, 2023



Source: BERL analysis

8.4 HOUSEHOLD INCOME

There were 338,180 Māori households in 2023. The average household income from all sources was $129,700, comprising an average of $142,200 for those in their own home and $95,400 for those renting.

Total Māori household income of $48.5 billion was largely due to $22.2 billion in wages and $15.8 billion in social security transfers (Table 4). Spending on consumer goods and services, which increased 54 percent in the five-year period, no longer exceeds household income, as Māori household income rose faster than spending on consumer goods and services. But higher spending on net investments by households, as well as taxes, social security contributions, and fines, meant that the net savings position of Māori households in 2023 was an estimated $9.7 billion deficit. This is a continuation of the worsening deficit (which was $9.0 billion in 2018), compared to a net savings position for non-Māori households in 2023 of a $13.4 billion deficit.

Table 4 Household sector income and expenditure, 2023

Household sector ($m)	Māori	Non-Māori	Total
Income			
Wages	22,182	149,786	**171,968**
Social security and assistance benefits	15,838	24,418	**40,256**
Entrepreneurial and dividend income	4,817	39,933	**44,750**
Operating surplus in dwellings	3,958	22,664	**26,622**
Interest, pension, and insurance	1,523	24,251	**25,774**
Overseas transfers	168	698	**866**
Sub-total	48,485	261,751	**310,236**
Less outlays			
Consumer expenditure	44,560	183,922	**228,482**
Other taxes, fines, and penalties	8,058	53,785	**61,843**
Interest on consumer debt and housing	1,111	6,364	**7,475**
Net investment by households	3,332	19,081	**22,413**
Pension fund contributions	994	11,530	**12,524**
Overseas transfers	116	481	**597**
Sub-total	58,171	275,163	**333,334**
Net savings	**-9,686**	**-13,412**	**-23,098**

Source: BERL analysis

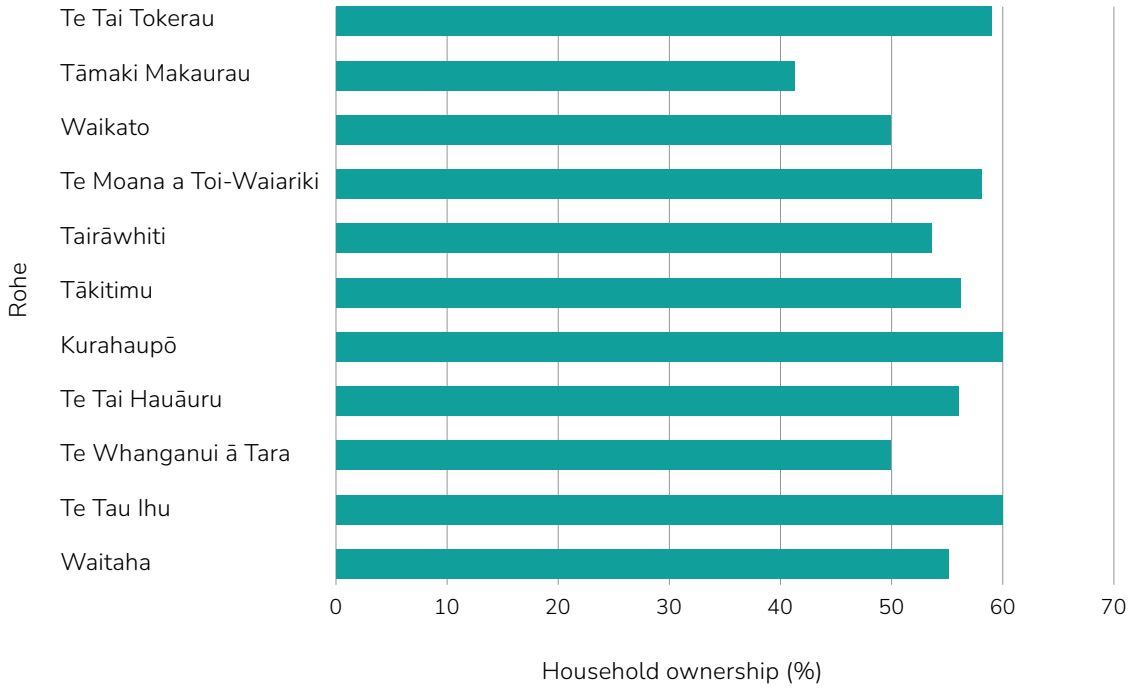
Social security and assistance benefits

For the first time since 2006, the proportion of social security and assistance benefits within the total income of Māori households did not increase. Social security and assistance benefits still comprised a significant portion of Māori household income (33 percent), and this percentage was notably higher than the rest of Aotearoa New Zealand (nine percent).

8.5 HOME OWNERSHIP

In 2023, 52 percent of Māori households owned their own home, compared to a 67 percent national average.[18] While this represents progress—175,000 households owning homes and a 4.5 percentage point improvement since 2018—disparities remain substantial. The highest share of Māori households who owned their own homes was in Kurahaupō, followed by the lowest home ownership in Tāmaki Makaurau (Figure 21).

Figure 21 Māori home ownership rates by rohe, 2023



Source: BERL analysis

Home ownership offers a wide range of benefits to households. These include increased wealth accumulation, improved labour market outcomes, better mental and physical health, increased financial and physical health for whānau, and improved school performance and development of children. These beneficial financial and social outcomes are due to the stability offered by home ownership.

18 This includes everyone in a household where at least one person owns the dwelling.

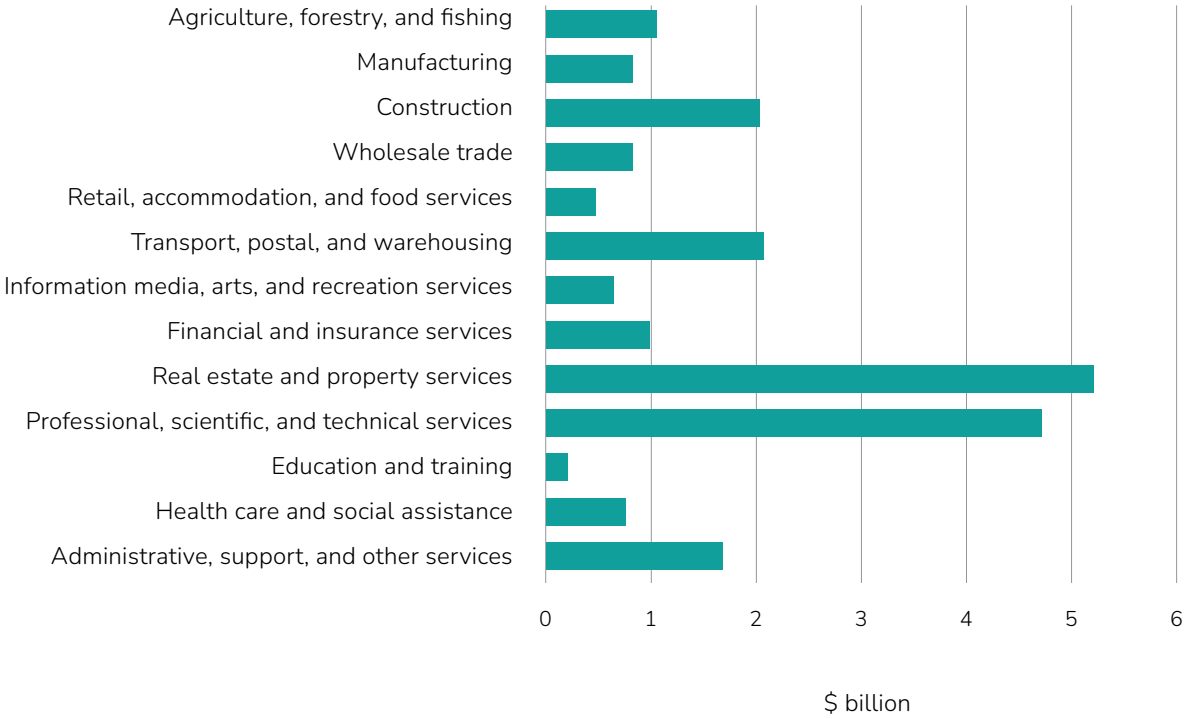
9 TĀMAKI MAKAURAU; UNIQUE AND DISTINCT

Tāmaki Makaurau is a unique and distinct rohe within Te Ōhanga Māori. Not only do the largest number of Māori call Tāmaki Makaurau home, but Te Ōhanga Māori i Tāmaki Makaurau (the Auckland Māori economy) is largely different to most other rohe in Aotearoa New Zealand. The rohe is home to the largest share of the Māori workforce, as well as the largest share of Māori businesses, and holds the biggest share of the asset base, followed closely by Waikato.

9.1 SIGNIFICANT REAL ESTATE AND PROPERTY SERVICES ASSET BASE

The Māori asset base in Tāmaki Makaurau differs from the rest of the country, as it is not concentrated in agriculture, forestry, and fishing (Figure 22). The biggest asset holders by sector were real estate and property services ($5.3 billion), as well as professional, scientific, and technical services ($4.7 billion).

Figure 22 Tāmaki Makaurau Māori asset base by industry, 2023

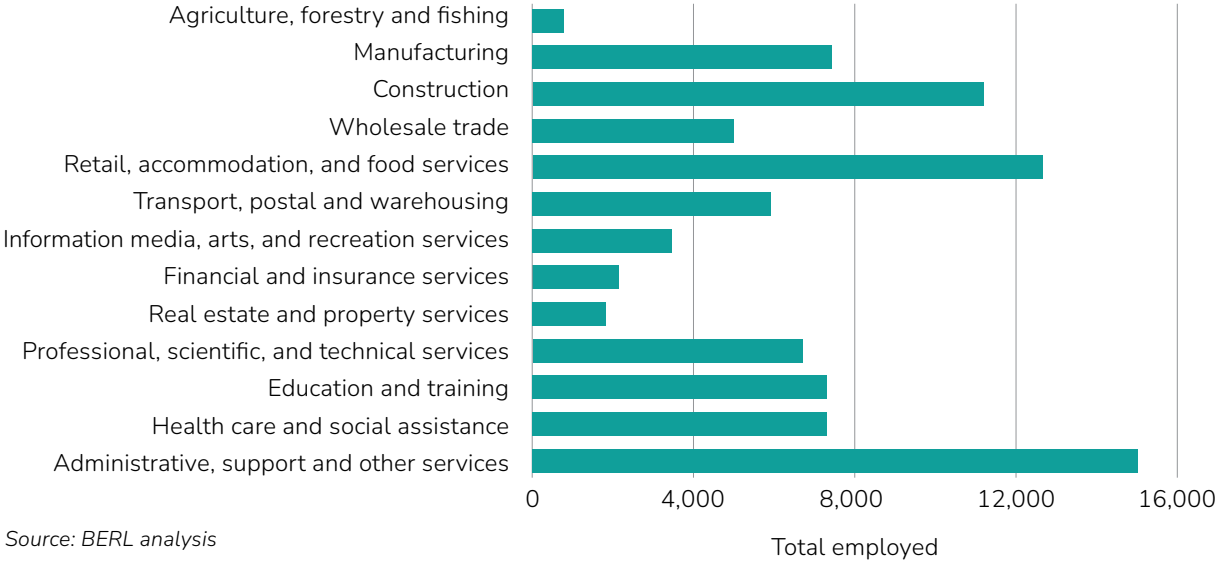


Source: BERL analysis

9.2 LARGEST MĀORI WORKFORCE

The uniqueness of Te Ōhanga Māori i Tāmaki Makaurau is evident in the industry spread of Māori employed in the rohe. Unlike Te Ōhanga Māori at a national level, where the primary industries are the driving proponents, in Tāmaki Makaurau Māori were employed in a range of different sectors and industries (Figure 23). Only one percent of the workforce is employed in agriculture, forestry, and fishing. The biggest employer is administrative, support, and other services, followed by retail, accommodation, and food services.

Figure 23 Total employed Māori in Tāmaki Makaurau, 2023



Source: BERL analysis

9.3 BUSINESS HUB

The largest concentration of Māori-owned businesses in Aotearoa New Zealand in 2023 was within Tāmaki Makaurau, representing 23 percent of all Māori-owned businesses. The biggest sector was the construction sector, largely consisting of small enterprises, followed by professional, scientific, and technical services (Table 5).

Table 5 Māori-owned businesses by sector, Tāmaki Makaurau, 2023

Industry, 2023	Māori-owned businesses
Agriculture, forestry, and fishing	199
Manufacturing	258
Construction	1,578
Wholesale trade	126
Retail, accommodation, and food services	332
Transport, postal, and warehousing	189
Information media, arts, and recreation services	159
Financial and insurance services	126
Real estate and property services	338
Professional, scientific, and technical services	1,020
Education and training	86
Health care and social assistance	207
Administrative, support, and other services	776
Not elsewhere included	0
Total	**5,394**

Source: BERL analysis, Te Matapaeroa

KIWA DIGITAL CASE STUDY

KIWA Digital is a world-leading cultural creative agency and indigenous-owned media technology business. Founded in 2003, KIWA initially developed post-production software for dubbing children's television into te reo Māori. Its flagship product, VoiceQ, supports over 900 language codes and has been integral in dubbing international TV series into English, including top shows on Netflix.

VoiceQ has been used to dub projects in various indigenous languages, including Native American and African languages. The software's effectiveness has been a key factor in maintaining relationships with large international media clients like Disney and Netflix. KIWA also recognises the importance of indigenous data sovereignty and has developed CultureQ to safeguard and share cultural assets while maintaining narrative and data sovereignty.

KIWA's mission has evolved to focus on building cultural literacy in adults and uplifting indigenous voices through technology. The company aims to bridge cultural divides, build understanding, and preserve indigenous stories, culture, and language worldwide. KIWA Cultural Services partners with content owners to produce digital solutions that promote cultural understanding using proprietary technology like QutPro.

As a Māori-owned business, KIWA integrates cultural values into its operations. The KIWA whānau have created a unique and sustainable business model; there is a strong sense of identity and responsibility as a Māori business, which has opened many doors for collaboration with iwi and, more recently, indigenous businesses globally. Steven Renata, Kaiwhakahaere Matua, highlights the importance of trust and respect in building relationships with clients and partners.

Trust, respect, and cultural care are just as much a part of the work environment of KIWA, and all contribute to employee satisfaction and a low turnover. KIWA provides opportunities for employees to learn and grow, particularly supporting employees' personal journeys in learning te reo Māori and tikanga. As a technology business, KIWA has adapted and embraced remote workflows and cloud-based technology. The company helped voice actors set up remote recording capabilities, ensuring their mental health and financial stability.

Kaitiakitanga is reflected in their care for both land and people. This includes projects that support indigenous communities and ensure the well-being of workers. As a digital business, KIWA incorporates environmental considerations into their operations, even in non-traditional ways. This includes being a paperless company by default and working on projects that blend mātauranga with science.

KIWA's commitment to authenticity in relationships and leading-edge technologies has positioned it as a leader in the global media technology industry. The business continues to focus on expanding its global reach while maintaining its commitment to indigenous communities.

10 GROWING IMPORTANCE OF TE ŌHANGA MĀORI

Titiro whakamuri, kōkiri whakamua

Look to the past in order to move forward.

Te Ōhanga Māori has become an increasingly vital component of Aotearoa New Zealand's overall economic landscape. Over recent years, it has demonstrated remarkable growth and diversification, moving beyond traditional sectors such as agriculture, forestry, and fishing. This transformation is evident in the significant increase in the Māori economic contribution to Aotearoa New Zealand's GDP, which has grown from $17 billion in 2018 to $32 billion in 2023.

The asset base of Te Ōhanga Māori has also seen remarkable growth, rising from $69 billion in 2018 to $126 billion in 2023. This growth is driven by various sectors, including real estate property services, and professional services, which now lead the way. Te Ōhanga Māori diversification and expansion into high-value sectors highlights its dynamic nature and its crucial role in driving Aotearoa New Zealand's economic prosperity.

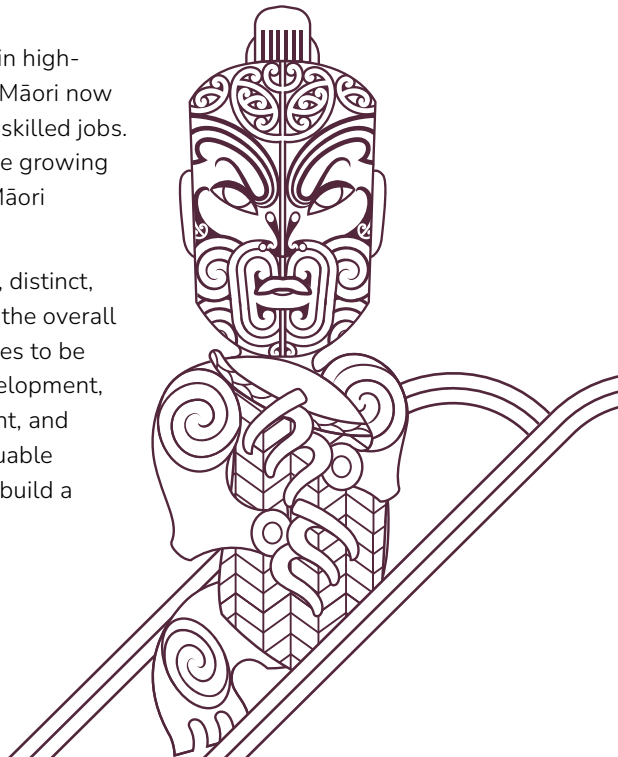
Furthermore, Māori entrepreneurship has continued to flourish, with a significant increase in the number of self-employed Māori and Māori employers. This entrepreneurial spirit is a testament to the resilience and innovation within the Māori community. The growing importance of the Māori economy is not only reflected in its financial metrics but also in its contribution to social and cultural well-being, making it a cornerstone of Aotearoa New Zealand's future economic success.

Māori collectives also play a significant role in driving economic growth and managing assets. The value of assets held by Māori collectives nearly doubled between 2018 and 2023, reflecting their critical role in managing and delivering economic opportunities for current and future generations. These collectives are often the leading entities representing different commercial operations for whānau across Aotearoa New Zealand, taking an intergenerational approach to their decision making.

Despite these positive trends, there are still areas that need to be addressed to ensure the continued growth and sustainability of Te Ōhanga Māori. One of the key issues is the persistent economic disparity faced by Māori households. Home ownership rates among Māori remain lower, with only 52 percent owning their homes compared to 67 percent for non-Māori households. Additionally, government grants and social benefits constitute a larger portion of Māori household income, accounting for 33 percent of the total, compared to nine percent for non-Māori households.

Another area that requires attention is the underrepresentation of Māori in high-skilled jobs. Although there has been a positive shift, with 46 percent of Māori now in high-skilled jobs, there is still a significant portion (40 percent) in low-skilled jobs. Addressing these disparities is crucial for ensuring that the benefits of the growing Te Ōhanga Māori are equitably distributed and that all members of the Māori community can participate fully in its success.

In summary, Te Ōhanga Māori 2023 research paints a picture of a strong, distinct, and diversified Māori economy that is making significant contributions to the overall economic landscape of Aotearoa New Zealand. While there are challenges to be addressed, the report provides a roadmap for continued growth and development, emphasising the importance of inclusive wealth, sustainable development, and social equity. The insights and data presented in this report will be invaluable for policymakers, businesses, and communities as they work together to build a prosperous and equitable future for Aotearoa New Zealand.



APPENDICES

APPENDIX A METHODOLOGY

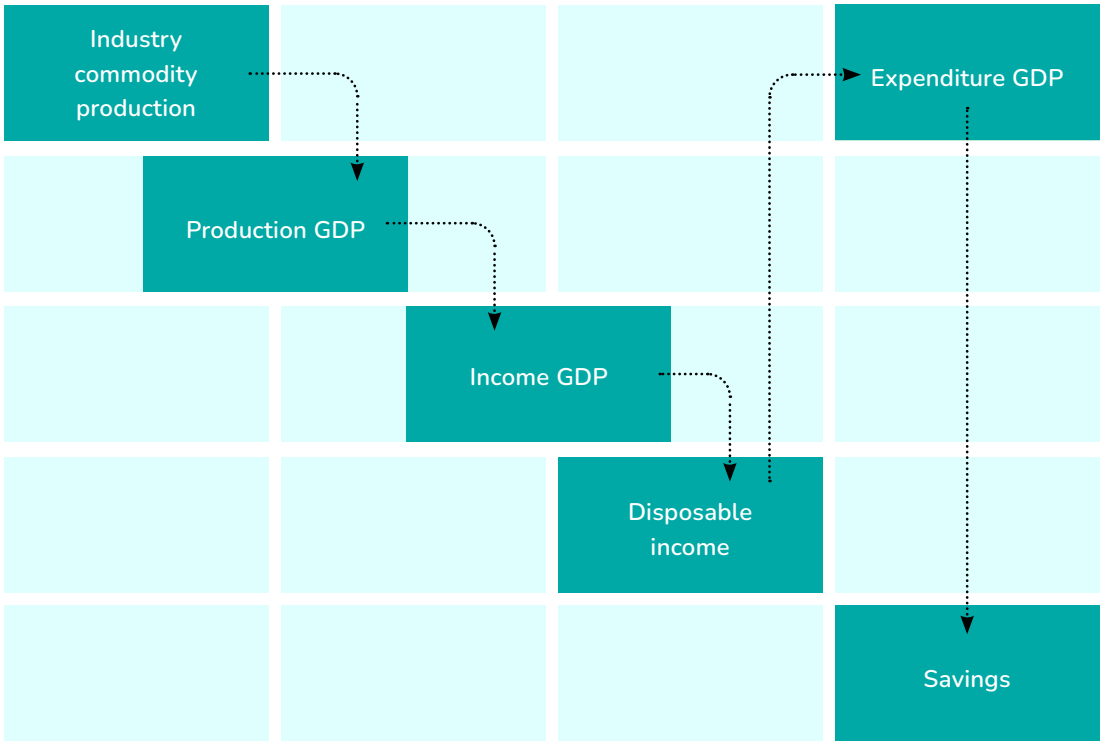
In this section we cover the methodology of the overarching framework used in the report, the Social Accounting Matrix (SAM), along with the changes in methodology between 2018 and 2023. This includes discussion about the most notable change in determining the number of Māori businesses 2023 and their asset base (required for our overall asset base calculations and to feed into the SAM).

SOCIAL ACCOUNTING MATRIX

A Social Accounting Matrix (SAM) summarises the many payments or transactions in an economy. These transactions or payments may involve a person, an industry, a household, an enterprise, government, a foreign customer, or a supplier. The SAM summarises the source and destination of these transactions, i.e., who is making and who is receiving the payments. Figure 24 illustrates the payments or relationships representing the core transactions.

A matrix is another word for a table of numbers. In general, each column of the table represents payments by a person, and each row of the table represents payments received by that person. For example, take the case of a household paying income tax. This transaction will be represented by an appropriate figure in the intersection of the household column and the government row of the matrix.

Figure 24 Schematics of a SAM



Source: BERL analysis

There are other entries in the matrix. For example, there are some figures representing transfers within sectors and other notional transactions.[19] In a more formal sense, a SAM comprises a combination of an inter-industry transactions (or input-output) table, and the accounting flows of income and outlays for particular institutional sectors of an economy.

19 National transactions are those recorded for economic or accounting purposes, but do not take place as a real-world transaction. For example, the national payment by those residing in their own home to themselves reflects the economic rental value of their owner-occupied property. This is included by Stats NZ to ensure that the economic operation of rental and owner-occupied property is treated equally in the National Accounts.

INTER-INDUSTRY TRANSACTIONS AND PRODUCTION GDP

Transactions between the various industries of the economy form the basis of the production component of the SAM. For example, the fish processing industry buys the raw fish catch from the fishing industry along with other inputs from other industries (e.g., energy from the electricity industry) in order to make its fish product, or commodity. Thereafter, the processing industry is also likely to purchase transport services from the transport industry in order to convey its product to its final customer (whether to an export port ready for foreign customers or for internal distribution to retail consumers or other domestic users).

Of course, industries do more than just purchase and sell between themselves. They combine both the raw and material inputs they purchase from other industries and in such transformations they add value to the products or commodities they ultimately produce. Such value added is, in an economic sense, equivalent to the GDP contribution of each production industry.

This value added constitutes the payments (or returns) to the primary resources used in the production of each commodity. In its simplest form, primary resources (or factors of production) are limited to labour and physical capital. Consequently, production GDP is captured in the SAM as payments by industries to the owners of labour and capital – that is, wage and profit payments.

These wage transactions are listed in the SAM at the intersection of the relevant industry columns and the owners of labour row. Similarly, the profit transactions are placed at the intersection of the relevant industry columns and the owners of capital row. The sum of these wage and profit payments is conceptually equivalent to the total value add by the producers in an economy and is termed the production measure of GDP.

Thus, the value added of the fishing industry, for example, is equivalent to the wage payments to those employed in the industry and the surplus of the industry. The latter represents payments to the owners of the machinery, equipment, and buildings used in the industry.

INCOME GDP AND DISPOSABLE INCOME

From the production segment of an economy, we move on to the income segment. In this context, the SAM firstly captures the conceptual transactions that translate the income of labour and capital owners into the income of households, and those of the producer enterprises owners.

The entries in the SAM have, for example, figures at the intersection of the owners of labour column and the household row. Other income payments, received by households from the owners of capital row, would include returns to self-employed persons in their role as business owners across the various industries. The income of enterprises, predominantly at the intersection of the producer enterprises column and the owners of capital row, represent the conceptual transfer of the surplus of industries into profits of producer enterprises.

It is true that the translation of the incomes of the factors of production (labour and capital) into the incomes of households and enterprises captures, in the main, notional rather than actual transactions. Nevertheless, this segment of the SAM enables an economy's value added to be expressed in an alternative form – namely, income GDP. Consequently, we can capture another dimension to the participation of Māori in the Aotearoa New Zealand economy, i.e., the participation via the income measure of GDP of Māori households.

Very generally the wage payments of those employed, for example, in the fishing industry are likely to be predominantly translated into household income. Similarly, the surplus of this industry is likely to form the basis of the income of producer enterprises.

Disposable income

Having established the income GDP of households and producer enterprises, the SAM moves on to summarise the transactions that lead to the disposable income of these components of the economy. In contrast to the previous segment of the SAM, the majority of these transactions are actual rather than notional. In particular, entries in this segment include income and corporate tax payments to government by households and producer enterprises, as well as social security and benefit payments from government to households. In addition, mortgage and other debt interest payments by households are recorded here in the financial institutions row. Household receipts from financial institutions represent interest as well as superannuation income along with insurance pay-outs.

EXPENDITURE GDP AND NET SAVINGS

Given the disposable income of households and producer enterprises, the final set of core transactions captured by the SAM is the expenditure on goods and services (i.e., the commodities) that are produced by industries. The expenditure by households on consumer goods would be included in the intersection of the household column and the row for the industry producing each consumer commodity. For example, purchases of fish products by the household are likely to be predominantly in the row of the fish processing industry (noting that the household is unlikely to be purchasing the raw fish catch of the fishing industry). Other consumer spending such as fuel (purchased from the fuel retailing industry), to enable consumers to drive to the supermarket to purchase fish products, will also be included here.

Expenditure by producer enterprises on goods and services predominantly involves capital expenditure (investment) on machinery, equipment, and buildings. This expenditure is required to maintain and expand the physical resources available to the industry for use in its production processes. For example, the purchase of a fishing boat by a producer enterprise active in the fishing industry would appear in the producer enterprise column and the row relating to the marine equipment making industry. This set of transactions also includes government purchases of goods and services – for example, the purchase of health services from the health services industry.

The remaining set of transactions here are the purchases by overseas customers of the goods and services produced by Aotearoa New Zealand industry. These export transactions are captured in the intersection of the overseas column and the relevant industry row. Conversely, there will be a set of transactions representing the purchase by Aotearoa New Zealand households and industries of goods and services produced abroad. These import transactions will be represented by figures in the overseas row across the various columns for the range of households and industries.

For example, the petroleum refining industry will be purchasing crude oil imports, which gets translated into petrol purchased by a household via transactions with the fuel retailing industry. Similarly, it is likely that the purchase of a fishing boat by a producer enterprise active in the fishing industry will also require the purchase of a variety of mechanical and electrical components from abroad by the marine equipment making industry.

The total of the expenditure in this segment of the SAM, net of imports, is equivalent to the expenditure measure of GDP. Consequently, a further dimension to the Māori participation in the Aotearoa New Zealand economy can be described – namely, through the expenditure of Māori households.

Net balance or savings

Finally, the SAM enables the calculation of the net balance position of the household, government and producer enterprise sectors. This is derived directly from the calculated disposable income of each of the sectors minus their expenditure.

In addition, the net balance of transactions with the overseas sector can also be calculated from the figures contained in the SAM. Note, as well as exports and imports of commodities, other transactions with the overseas sector are also included in the SAM. In particular, interest, profits and/or dividends from producer enterprises active in Aotearoa industries may be remitted to foreign owners. This will be shown in the intersection of the producer enterprise column and the overseas row.

Similarly, transfers or other transactions from the overseas sector to, for example, Aotearoa New Zealand households, will be shown in the intersection of the relevant row and the overseas column in the SAM. Consequently, the net balance of transactions with the overseas sector is equivalent to the balance on the current account of the Balance of Payments. This balance comprises the balance on trade flows (i.e., export revenue minus import payments), as well as the balance on financial transactions (i.e., interest, profits, and other asset income and payments) with the rest of the world.

A cross-check of the net savings figure is provided by the macro-economic identity. This states that the sum of the net savings of all these domestic sectors plus the net balance of transactions with the overseas sector must equal zero. In other words, if the balance of the overseas sector is positive (i.e., surplus or savings), then the sum of the balances of all the domestic sectors would have to be negative (i.e., deficit or dissaving) of the same magnitude.

ENTERPRISES

Output and income

Gross output of producer enterprises begins with the estimate of gross output from the input-output tables.

Costs of production

The costs of production for each industry, including compensation of employees, purchase of intermediate commodities (including imports) and other input costs arise from the input-output inter-industry transactions table. In generating these costs, their proportions in relation to each industry's gross output are set the same as those implied by the input-output table.

Outgoings

Distributions to households in the form of entrepreneurial and dividend income are the converse of those in the household account. All entrepreneurial income accruing to Māori households is assumed to source from Māori producer enterprises. However, the proportion of the dividend distribution from Māori producer enterprises allocated to the Māori household sector is equal to the Māori proportion of income from the interest, dividend, rent, or other property income categories. This is sourced from IRD data for the year to March 2023, and combined with 2023 Census data within the IDI.

Corporate tax from the Government Financial Statements is allocated to Māori enterprises according to the proportion of gross output in Māori enterprises to total gross output. The proportion of the total for capital spending from the input-output table allocated to Māori enterprises is calculated as the Māori proportion in the consumption of fixed capital in industries from the input-output table.

HOUSEHOLDS

The majority of the components of income are derived from a division of the income listed in the Household Income and Outlay Accounts. In all cases, where relevant, figures from the input-output table are retained for consistency with industry data. The division between Māori and non-Māori households is undertaken using appropriate proportions from the 2023 Census and/or other sources, such as IRD data for the year to March 2023, sourced from the IDI.

Income

The income for Māori households is obtained by calculating within the IDI the total Māori income earned by all individuals within a household using IRD data on total incomes for the year to March 2023. Social security assistance and benefits for all households is from Household Income and Outlay Accounts. The income for Māori households is obtained by applying the Māori proportion of total income by source from IRD and Ministry for Social Development (MSD) datasets for the year to March 2023, sourced from the IDI, for the following sources: New Zealand Superannuation or Veterans Pension, Jobseeker support, Sole parent support, Supported living payment, or Student Allowance.

Entrepreneurial income and dividend income for all households is accessed from the Household Income and Outlay Accounts. Entrepreneurial income for Māori households is obtained by applying the Māori proportion of total income sourced from IRD data on earning for those self-employed. Dividend income is split according to the proportion of total income from the interest, dividend, rent, or other property income categories from IRD datasets within the IDI, for the year to March 2023.

Operating surplus accruing from ownership of owner-occupied dwellings is from the input-output table. The income for Māori households is obtained by applying the Māori proportion of total households from the 2023 Census reporting those who live in private owner-occupied dwellings.

Pension fund benefits, including equity changes and interest and insurance receipts, are from the Household Income and Outlay Accounts. The former component is split according to the Māori proportion of total income from the Superannuation, Pensions, Annuities categories sourced from IRD datasets for the year to March 2023. The latter component is split according to the Māori proportion of total income from the interest, dividend, rent, or other property income categories from IRD datasets for the year to March 2023.

Overseas transfers are from the Household Income and Outlay Accounts. This is split according to the Māori proportion in the number of households from the 2023 Census.

Outgoings

Determining the outgoings from the household sector accounted for by Māori households was achieved, predominantly, by using appropriate shares from the 2023 Census and the 2022 Household Economic Survey (HES) data. Consumer expenditure from the input-output tables is split according to the Māori proportion of total expenditure per industry. This proportion is calculated by assigning each household within the 2023 Census to one of 10 income groups and then using 2022 HES data on expenditure by industry for each income group, to determine the overall proportion of household expenditure per industry for Māori households.

Income tax, other current taxes, social security contributions, and fines and penalties are from the Household Income and Outlay Accounts. These are split according to the Māori proportion of total individual income from IRD for the year to March 2023.

Interest on consumer debt and interest on housing are from Household Income and Outlay Accounts. These are split according to the Māori proportion of households from the 2023 Census reporting that they live in their own dwellings.

Investment in owner-occupied dwellings is from the input-output tables. This is split according to the Māori proportion of households from the 2023 Census reporting that they live in their own dwellings.

Pension fund contributions are from the Household Income and Outlay Accounts. This is split according to the Māori proportion of total income from the Superannuation, Pensions, Annuities categories sourced from IRD datasets for the year to March 2023.

Overseas transfers are from the Household Income and Outlay Accounts. This is split according to the Māori proportion in the number of households from the 2023 Census.

Net savings reconciliation

The Household Income and Outlay Accounts indicate net savings. The difference between these two estimates can be attributed to data limitations, as well as conceptual differences between input-output and National Accounts information.

CHANGES IN METHODOLOGY BETWEEN 2013, 2018 AND 2023

Since the 2013 Te Ōhanga Māori report, and even between the 2018 and 2023 Te Ōhanga Māori reports, there have been a number of changes in the methodology used to determine the data that is fed into the Social Accounting Matrix (SAM). These changes can be split into four areas, general data source changes, changes in method and data sources for determining the number and asset base of Māori-owned businesses, changes in the method for determining the asset base of Māori entities, and the addition of export data.

GENERAL CHANGE IN DATA SOURCES

Since Te Ōhanga Māori 2013, Stats NZ created the IDI, which now contains a wide range of anonymised individual administrative data from across government and non-government agencies, including Census data, the Household Economic Survey (HES), Inland Revenue Department (IRD) tax data, and Ministry of Social Development (MSD) benefit data. For Te Ōhanga Māori 2018, and even more so for Te Ōhanga Māori 2023, this data source has been invaluable to BERL to enable us to combine datasets at the individual level. This allowed us to calculate more accurate and robust estimates of the Māori proportion of variables such as total income from employment, total self-employed income, total income from benefits, total income from pensions, total income for Māori households, etc., and thereby replace our previous approach of using only Census data on the number of people who received income by source.

MĀORI-OWNED BUSINESS (TE MATAPAEROA)

In the past, the lack of a robust methodology to identify private businesses as Māori-owned was a limiting factor in our ability to robustly estimate the total asset base of private Māori businesses. Due to these limitations, previously BERL used the percentage share of individuals whose employment status was employer (from the Census) to estimate the percentage share of private Māori businesses contained in each industry. This approach also required us to assume that a private Māori business on average was the same as a non-Māori business on average within each industry. This assumption was required so that we could use annual enterprise survey (AES) data on total industry assets to determine the average asset base of private businesses, both non-Māori and Māori, in each industry, as there was no available data on the relevant size of a private Māori businesses compared to non-Māori businesses.

Since Te Ōhanga Māori 2018 was released, Te Puni Kōkiri has released iterations of Te Matapaeroa. In developing these reports, a more robust and accurate methodology has been created using business tax records within the Stats NZ IDI to identify payments from businesses to individual shareholders. As these shareholders are individuals, they can be identified as being of Māori ethnicity or descent using Census or other IDI datasets. This approach has enabled a significant segment of private businesses to be identified as either Māori or non-Māori using a definition of private Māori businesses from Te Matapaeroa. This definition requires at least one owner of the business to be of Māori ethnicity or Māori descent.

The advantage of this process is that it is robust and more accurate than previous methods, and using the IDI enables the direct estimation of the average assets per industry of these identified private Māori businesses from AES data. The main limitation of this methodology is that not all private businesses can be identified either because they do not make direct payments to shareholders, are not directly owned by individuals.

We would like to acknowledge and thank the Evaluation, Research & Engagement (Arotake, Rangahau me Totoro) team of TPK, namely Rajas Kulkarni, Angus Prain, and Melanie Berg, who provided BERL with a customised dataset of 2023 data of Māori-owned businesses using the methodology established in Te Matapaeroa.

As of 2023, Te Matapaeroa identified 23,748 private Māori businesses, out of some 191,250 private businesses able to be identified. This is still a selection of the more than 500,000 businesses operating in Aotearoa New Zealand.

COLLECTIVES

Data for the collectives' asset base is obtained from three different data source:

- Charities Services
- Māori Land Court
- Annual reports of Māori trusts, entities, iwi, and other collectives.

While these data sources have remained constant for the 2013, 2018, and 2023 reports, the way the data is used, and the granularity of the data from these sources has been improved with each iteration.

For this report, more focus has been put into determining how we can take these data sources and estimate the

assets held by each Māori entity and the industry each asset is held in to a much more granular degree. As we became more familiar with the Charities Services and expanded and improved our dataset of annual reports, we were able to find further information for each entity. The advantage of increasing the granularity of the data is that we are able to better mimic the real-world diversification of assets that these Māori entities are undertaking.

For the Māori freehold land, the land valuation model built in 2018 to estimate the value of this land has been improved and augmented for 2023 through the continuation of projects within Te Ōhanga Māori. In addition, the area of land within the MLC dataset has been updated to 2023. This has meant that along with being able to more accurately estimate the value of the land, the area of Māori freehold land has increased since 2018 by around 150,000 hectares. In 2023, around 1,500,000 hectares was classified as Māori freehold land.

EXPORT DATA

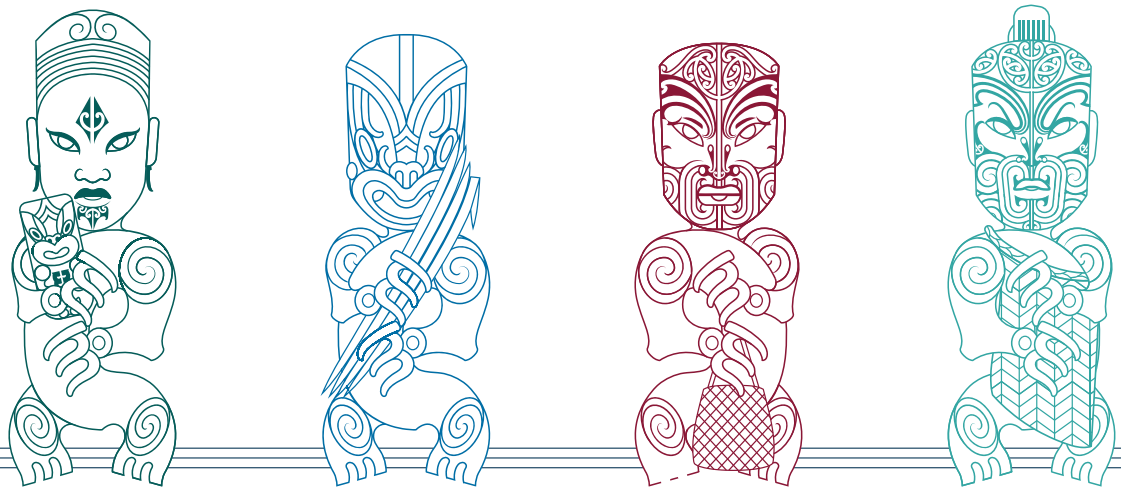
For the first time, this iteration of Te Ōhanga Māori expanded to include Māori export-related data. We note that we are still very much at the beginning of work to better understand and analyse exports within Te Ōhanga Māori. This is an area that will require further research and improvement.

This report presents export data from two different data sources and covers two segments of exports.

We would like to again acknowledge the Evaluation, Research & Engagement (Arotake, Rangahau me Totoro) team of TPK who provided our first source of export data. This team, responsible for Te Matapaeroa, have begun examining export data (both merchandise exports and service exports) for identified private Māori businesses. The dataset provided allowed us to begin analysing how prevalent exporting is for private Māori businesses, and how many of them are major exporters (defined by TPK as businesses with $250,000 or more of recorded exports, and 50 percent or more of their total sales revenue being exports).

While this work is very useful in providing information at a business level for identified private Māori businesses, it is at present more limited in its ability to enable us to estimate the total export levels coming from Te Ōhanga Māori. This means that to estimate the overall export level for both merchandise and service exports, we need to make use of other data sources; in this case, the proportion of each industry in Aotearoa New Zealand that is estimated to be part of the Māori economy asset base. At present, this same data is fed into the SAM to enable us to calculate the industry and overall production GDP for Te Ōhanga Māori and other business outputs.

In using this data, we had to assume that exports, both merchandise and service exports, have a normal distribution within the industry. That is, the spread of exporters is evenly spread, rather than concentrated within a small portion of the industry. By making this assumption, it enables us to take Stats NZ data on merchandise and services exports for the year to March 2023 and assign them to their relevant industries. We can multiply the estimated portion of each exporting industry by the total amount of exports, for the year to March 2023, to estimate the total value of direct exports coming from Te Ōhanga Māori. It is important that as present the focus is on assigning direct exports to the industry that directly exported, rather than industries that contributed to exports (supply chains). For example, dairy exports would be assigned to the dairy processing industry only, and nothing would be assigned to the dairy farming industry despite its considerable input into the outputs of the dairy processing industry.



APPENDIX B SCOPE AND LIMITATIONS

SCOPE

Based on the methodology established in the first iteration of Te Ōhanga Māori (2011), a broader definition of what constitutes Te Ōhanga Māori was retained to ensure a consistent and comparable analysis, maintaining that all entities and enterprises that self-identify as part of Te Ōhanga Māori are to be included. This report presents

- An updated calculation of the 2023 contribution to Aotearoa New Zealand's GDP from Te Ōhanga Māori enterprises
- An updated SAM to depict the 2023 income and expenditure flows within Te Ōhanga Māori and between Te Ōhanga Māori and the wider Aotearoa New Zealand economy
- An update of the asset base of Te Ōhanga Māori enterprises
- A calculation of exports from Māori-owned businesses.

The coverage of enterprises from the source data has effectively broadened through the inclusion of more comprehensive Māori Land Court data, as well as more detailed information from the Charities Services. A discussion of the robustness of the data and the comparability of the estimates follows.

DATA SOURCES, ROBUSTNESS, AND COMPARABILITY

This report has been compiled using a variety of data sources, supplemented by modelling. Data sources include official statistics and other resources (e.g., annual reports).

As noted above, the methodology adopted and the data sources used are comparable to those used in each iteration of Te Ōhanga Māori, with methodology improvements and expansion.

Specific data sources include:

- 2023 Census
- Annual Enterprise Survey (AES)
- Inland Revenue Department (IRD) and Ministry for Social Development (MSD)
- Te Matapaeroa (Te Puni Kōkiri)
- 2022 Household Expenditure Survey
- Consumer Price and Capital Goods Price Indices (various dates)
- Business Demography Statistics (BDS)
- Household sector income and outlay accounts
- 2023 National Accounts
- 2020 Inter-industry transactions.

However, the combination of administrative data used (in particular from the Māori Land Court and Charities Services), necessarily calls into question the validity and comprehensiveness of the resulting estimates. We are aware that our estimates would be unlikely to meet the rigorous standards for official status. Further, we would not wish our estimates to be portrayed as such.

The range of data we have secured, along with BERL's experience and knowledge of Te Ōhanga Māori activities, ensures that we are confident of the robustness of our indicative estimates at the headline level. However, the greater the degree of disaggregation in the estimates the greater the margins for error and inaccuracy. Hence, the more disaggregated estimates should be treated with appropriate caution.

All the data and tables in this publication have been estimated by BERL using a variety of official and unofficial sources. Estimates have been rounded and also aggregated to ensure confidential information is not released. Consequently, the sum of the components may not add precisely to the totals shown. All data, unless otherwise stated, refer to the year ended March 2023.

We use the ANZSIC to present industry data, as detailed in Table 6. The 2006 version of the ANZSIC classification is used, which is the most recent version. Due to changes in the classifications (Te Ōhanga Māori 2011 used the 1993 version of ANZSIC), the comparability of industry estimates is not straightforward. At the broad industry level, we have described some comparisons that are valid.

More comprehensive and detailed information from the Māori Land Court and Charities Services provided greater robustness, as well as adding to the richness of our estimates. Despite these additions, we believe comparability with the headline estimates in Te Ōhanga Māori 2011 has not been compromised.

While the Māori Land Court data did entail a greater number of land holdings to be included in our estimates, these additions were small in area. Further, given the lack of details, highly conservative values were imputed during the modelling process for these areas, similar to the process adopted in previous iterations.

Charities Services data provided better information on the activities undertaken by many Māori enterprises in the broader services sector. We believe this has improved the allocation of Māori enterprises to appropriate ANZSIC sectors and has assisted in generating the regional dimension to our estimates. However, our earlier note regarding caution in using the more disaggregated information remains.

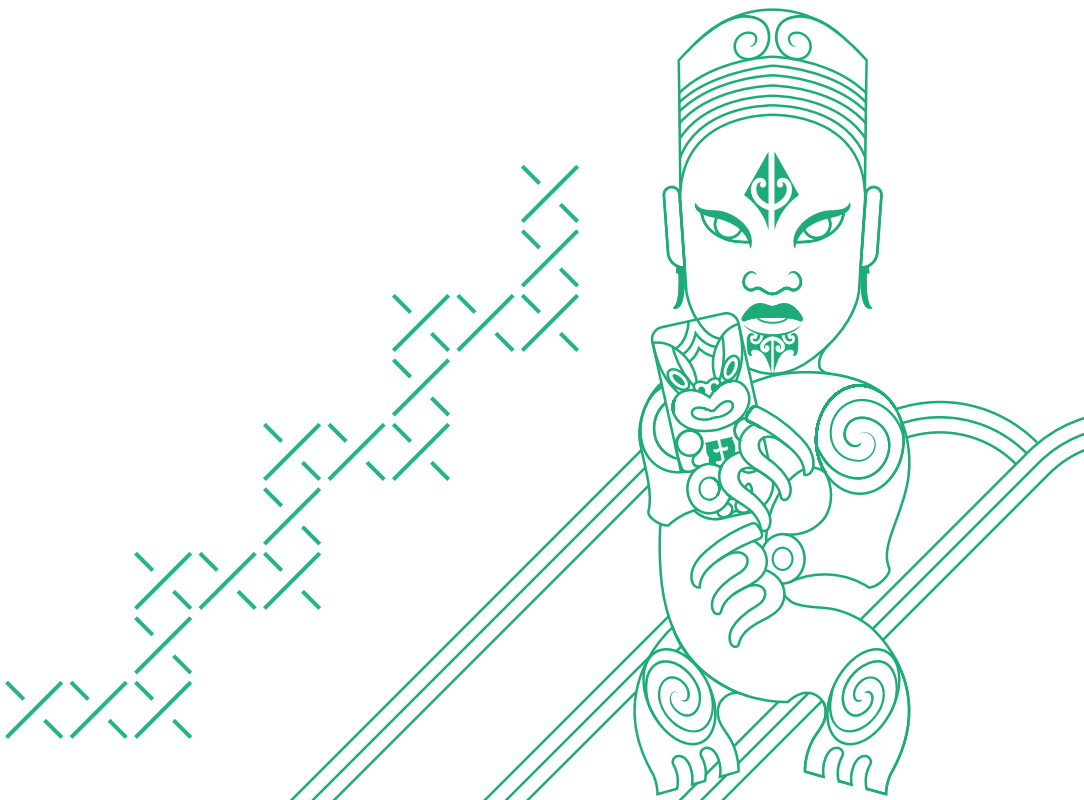


Table 6 Industry definitions

Abbreviation	ANZSIC code	Industry description
A1A2	A012-A013	Horticulture
A3	A014	Sheep and beef farming
A4	A016	Dairy
A5A7	A02+A04	Fishing and aquaculture
A6	A03	Forestry
A8	A011+A015+A017-A019+A05	Other agriculture and services to agriculture
B	B	Mining
C1	C111	Meat processing
C2	C113	Dairy processing
C3	C112+C114-C119	Other food manufacturing
C4	C14-C15	Wood and paper manufacturing
C5	C21-C25	Fabricated metal products
C6	C12-C13+C16-C20	Other manufacturing
D	D	Electricity, gas, water, and waste services
E	E	Construction
F	F	Wholesale trade
G	G	Retail trade
H	H	Accommodation and food services
I	I	Transport, postal, and warehousing
J	J	Information media and telecommunications
K	K	Finance and insurance services
L	L	Rental, hiring, and real estate services
M	M	Professional, scientific, technical services
N	N	Administrative and support services
O	O	Public administration and safety
P	P	Education and training
Q	Q	Health care and social assistance
R	R	Arts and recreation services
S	S	Other services

Source: BERL analysis, Stats NZ

DATA LIMITATIONS

Using data from a variety of sources causes difficulty when ensuring consistency of treatment. If we limit ourselves to one data source, we can obtain a large degree of sector disaggregation, but at the expense of less than comprehensive coverage of transactions. Using a variety of sources may improve the coverage of the information available, but the sector detail of this information is likely to be more highly aggregated.

For this reason, industry and sector definitions have been kept broad to reduce the degree of detail required to be extracted from the data. For similar reasons, many of the non-core transactions between and within sectors have not been explicitly identified in the SAM developed for this project.

The use of Census data has advantages in its comprehensive coverage. However, information here is obtained from the perspective of individual details, rather than business details. Where appropriate we have had to imply relevant variables from individual data rather than from business data. This has limitations in that obtaining data relevant to businesses distinguished by ethnicity is difficult, except, for example, the income of Māori and non-Māori self-employed businesses. The addition of Te Matapaeroa data has enabled us to overcome some of these limitations around the lack of business ethnicity data, and to move away from using individual data to represent business data.

Of particular importance in the generation of this SAM, and the consequential estimates for Māori participation, is the calculation of the Māori asset base.

Due to the lack of reliable information, we have not attempted to disaggregate the export dimension of producer enterprises by the ethnicity of these businesses. This reduces the analysis that can be supported by the SAM. Thus, any survey of businesses should also look to extract information on the export orientation of comparative businesses (ideally, Māori compared with other businesses). While we have included in this report some data on the number of Māori export businesses, work in this area is only just beginning and is not comprehensive enough to enable analysis that can be supported by the SAM.

The primary aim has been to obtain a credible picture of the Māori participation in the Aotearoa New Zealand economy. To do this, we established a reliable and robust data plan to support the estimated core transactions identified in Figure 24. We believe we have been successful in this aim.

USE OF INTEGRATED DATA INFRASTRUCTURE (IDI) DATA FROM STATS NZ

Access to the data used in this study was provided by Stats NZ under conditions designed to give effect to the security and confidentiality provisions of the Data and Statistics Act 2022. The results presented in this study are the work of the authors, not Stats NZ, or individual data suppliers.

These results are not official statistics. They have been created for research purposes from the Integrated Data Infrastructure (IDI) and Longitudinal Business Database (LBD) which are carefully managed by Stats NZ. For more information about the IDI and LBD please visit https://www.stats.govt.nz/integrated-data/.

The results are based in part on tax data supplied by Inland Revenue to Stats NZ under the Tax Administration Act 1994 for statistical purposes. Any discussion of data limitations or weaknesses is in the context of using the IDI for statistical purposes, and is not related to the data's ability to support Inland Revenue's core operational requirements.

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APPENDIX D ROHE DISAGGREGATION

Rohe	Te Puni Kōkiri regions	Māori Land Court area	Local government boundaries
Te Tai Tokerau	Te Tai Tokerau	Te Taitokerau	Far North District Kaipara District Whangarei District
Tāmaki Makaurau	Tāmaki Makaurau	Te Taitokerau	Auckland
Waikato	Waikato-Waiariki	Waikato-Maniapoto	Hamilton City Hauraki District Matamata-Piako District Ōtorohanga District South Waikato District Taupō District Thames-Coromandel District Waikato District Waipa District Waitomo District
Te Moana a Toi-Waiariki	Waikato-Waiariki	Waiariki	Kawerau District Ōpōtiki District Rotorua District Tauranga City Western Bay of Plenty District Whakatane District
Tairāwhiti	Ikaroa-Rāwhiti	Tairāwhiti	Gisborne District Chatham Islands District
Tākitimu	Ikaroa-Rāwhiti	Tākitimu	Central Hawke's Bay District Hastings District Napier City Wairoa District
Kurahaupō	Ikaroa-Rāwhiti	Tākitimu	Carterton Distric Tararua District Masterton District South Wairarapa District

Rohe	Te Puni Kōkiri regions	Māori Land Court area	Local government boundaries
Te Tai Hauāuru	Te Tai Hauāuru	Aotea	Horowhenua District Manawatu District New Plymouth District Palmerston North City Rangitikei District Ruapehu District South Taranaki District Stratford District Whanganui District
Te Whanganui ā Tara	Te Tai Hauāuru	Aotea	Hutt City Kapiti Coast District Porirua City Upper Hutt City Wellington City
Te Tau Ihu	Te Tai Hauāuru	Te Waipounamu	Marlborough District Nelson City Tasman District
Waitaha	Te Waipounamu	Te Waipounamu	Ashburton District Buller District Central Otago District Christchurch City Clutha District Dunedin City Gore District Grey District Hurunui District Invercargill City Kaikoura District Mackenzie District Queenstown-Lakes District Selwyn District Southland District Timaru District Waimakariri District Waimate District Waitaki District Westland District

APPENDIX E GLOSSARY

KUPU MĀORI

Kupu Māori	English
Hapū	A social unit comprised of related families based in a geographical area, who whakapapa to a common ancestor, although people affiliated to a hapū may not live in that area.
Hauora	Health, wellness, vigour.
Hui	Meeting or gathering.
Iwi	A number of related hapū sharing a territory, a confederation of tribes.
Kai	Food, to eat.
Kaitiaki	Guardian.
Kaitiakitanga	Guardianship, stewardship, and protection of the environment.
Karakia	Prayer, incantation.
Kaumātua	An older person within a whānau.
Kaupapa	Purpose, topic, or agenda.
Kawa	Protocols, customs, or ceremonies.
Mana	Prestige, status, authority, mandate.
Manaakitanga	Hospitality, generosity, showing respect and care for others.
Manahau	Joyful, buoyant, or in high spirits.
Manuhiri	Visitor.
Mātauranga Māori	Māori body of knowledge that arises from a worldview based upon kinship relationships between people and the natural world. Humans are not seen as superior to the natural order but rather as existing within it (Royal Society).
Mauri	Life force or essence.
Noa	Ordinary, unrestricted, or free from tapu.

Kupu Māori	English
Papatūānuku	Earth mother, the land.
Rākau	Tree, wood, or timber.
Rohe	District or region, or area of land.
Rongoā	Traditional Māori medicine.
Taonga	Something of value, may include goods or possessions, resources, ideas, and valuable items (culturally, socially, or financially).
Tapu	Sacred, restricted, or prohibited.
Tauutuutu	Reciprocity in social relationships.
Te Ao Māori	The Māori World.
Te Ōhanga Māori	The Māori economy.
Te Reo Māori	The Māori language.
Te taiao	The natural environment.
Tikanga	The correct procedure, custom, way, protocol - the customary system of values and practices that have developed over time and are deeply embedded in the social context.
Tīpuna	Ancestor.
Utu	Reciprocity, balance, or compensation.
Wairuatanga	Spirituality.
Whakapapa	Genealogy - Lines of descent and connections.
Whānau	Family.
Whanaungatanga	Kinship, connection.
Whenua	Land, ground, country.

TECHNICAL TERMS

Term	Definition
Assets	Land, buildings, machinery, equipment, vehicles, cash, shares that can be used to produce goods and services. Includes fishing quota, forest cutting rights, exploration and mining rights.
Compensation of employees	Payments to employees working in an enterprise, including wages, salaries, overtime payments, bonuses, and other remuneration.
Consumption spending	Spending by households on goods and services, for example food, clothing, motor vehicles and servicing, petrol, electricity, gas and other energy, entertainment, visits to doctor and other medical supplies, insurance. Includes notional rent paid by owner-occupiers to themselves (refer ***owner-occupied housing***). Contrast with investment spending.
Enterprises	Organisations that engage in producing goods and services for others to consume. Includes trusts, incorporations, businesses, service providers (profit and not for profits), iwi holding companies, rūnanga, Mandated Iwi Organisations (MIOs), Post-Settlement Governance Entities (PSGEs) and other similar entities.
Expenditure	Equivalent to spending. Sometimes termed outlays.
Final goods and services	Goods and services produced by enterprises that are purchased by or supplied to households, government, or foreigners. Also includes goods and services purchased by or supplied to ***enterprises*** as a result of their ***investment spending***. Contrast with intermediate goods and services.
Gross Domestic Product (GDP)	A measure of the total ***value added*** generated by all ***enterprises*** in an area, region, or country. GDP is equivalent to the sum of all ***compensation of employees*** and ***operating surplus*** (including all forms of profits) earned by workers and owners engaged in all ***enterprises*** in an area. Strictly speaking, GDP also includes indirect taxes levied on production. This is also equivalent to the total expenditure on ***final goods and services*** produced by enterprises in the area.
Industry	All ***enterprises*** in an area (region or country) that produce similar goods, or deliver similar services. They can be defined broadly (e.g., primary), narrowly (agriculture), or precisely (apples). Industry data for this study is based on the Australian New Zealand Standard Industrial Classification (ANZSIC), as detailed in Table 6.
Intermediate goods and services	Goods and services produced by ***enterprises*** that are purchased by or supplied to other ***enterprises*** to be used in the production of other goods and services. For example, the purchase by a meat processor of a sheep carcass from a farmer who then processes the carcass into meat products. Contrast with final goods and services.

Term	Definition
Investment spending	Spending by ***enterprises*** on goods and services that are new ***assets***. Includes spending on maintaining ***assets*** or on improving their value; for example, research activities aimed at restoring the nutrient balance in pastoral land; rewiring school buildings to improve computer network connections.
Labour force	Comprises all those employed (part-time or full-time), or those ***unemployed***. Note to be unemployed the individual must be available for and be actively seeking work. The measure of the labour force will exclude those retired, studying or otherwise not available for work. The labour force is a subset of the ***working age population***.
Nominal growth	The rate at which the sales of ***final goods and services*** increases. For example, if sales in one year totalled $100 and then $105 the next year, then nominal growth is said to be five percent per year (or 5% p/a). Note this growth includes the effect of changes in prices, as well as changes in the quantity, of final goods and services produced. Contrast with ***real growth***.
Not in the labour force	The subset of the ***working age population*** that are not employed, and are not available for work. Includes those retired, studying, at home looking after relatives, or otherwise not available for work.
Operating surplus	Total revenue from sales of an ***enterprise*** less payments for ***intermediate goods and services*** and ***compensation of employees***. This is equivalent to the income return to the owners of the assets being used by the ***enterprise***. While not strictly precise, this can be thought of as akin to profit. A component of this return will be the equivalent of consumption of fixed capital (akin to depreciation), being the portion of assets that have been used up during the period.
Owner-occupied housing	***Industry*** defined as householders living in residential property that they themselves own. This is included in measures of GDP so that its treatment is consistent with that of landlords renting residential property to others.
Productivity	A measure of how well ***assets*** are being used in the production of goods and services. An improvement in productivity occurs where more goods and services are produced this period (year) from the same group of ***assets*** than were produced last period (year). Equivalently, productivity can improve if fewer ***assets*** are required this period (year) to produce the same quantity of goods and services than were used the previous period (year). This definition, more correctly, relates to what is termed capital productivity. There is a parallel definition for labour productivity, e.g., how well labour is being used in the production of goods and services. Further, if we consider the use of ***assets*** and labour together, then there is a concept with a parallel definition termed total factor productivity.

Term	Definition
Real growth	The rate at which the quantity produced of ***final goods and services*** increases. For example, if the quantity of items produced was 100 in one year then 103 the next year, then real growth is said to be three percent per year (or 3% p/a). Note, this growth excludes the effect of changes in prices and so is a measure of the change in production. Contrast with ***nominal growth***.
Resources	Equivalent to ***assets***.
Social Accounting Matrix (SAM)	A table summarising the payments or transactions within or between enterprises, industries, households, government and/or foreigners.
Sector	Equivalent to industry.
Value added	The result of the production processes or service delivery activities of ***enterprises***. This is total revenue from sales less payments for ***intermediate goods and services*** used in their processes or activities. Value added is the equivalent of the ***compensation of employees*** plus the ***operating surplus*** generated by ***enterprises***. Closely related to ***GDP***.
Unemployed	Those who are without a job, but who are available for and are actively seeking work. The unemployed are a subset of the ***labour force***.
Wealth	Equivalent to ***assets***.
Well-being	Holistic perspective (or measure) of standard of living.
Working age population	The resident, non-institutionalised, civilian population aged 15 or more years old.

ABBREVIATIONS

Abbreviation	Definition
GDP	Gross Domestic Product.
SAM	Social Accounting Matrix.

MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

TE ŌHANGA MĀORI 2023

THE MĀORI ECONOMY 2023

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