



Te Puni Kōkiri
REALISING MĀORI POTENTIAL

Māori Economy in the Waikato Region



FOREWORD

E ngā mana, e ngā reo, e ngā karangatanga maha
Tēnā koutou katoa

This report highlights the significant contribution of Māori to the Waikato economy, with a quarter of the Māori collective asset base located in the Waikato. A higher proportion of residents of the Waikato identify themselves as Māori than in New Zealand as a whole. Through participation in the labour market and the ownership of a significant asset base, especially in agriculture, forestry and fishing and property and business services, Waikato iwi are active investors in a range of sectors, which offers significant potential for the Waikato.

The Māori Economy in the Waikato Region report provides us with robust data and information on which to base some focussed, action-oriented activities. Central and local government, Māori asset holders and business leaders need to continue to work together to create sustainable economic prosperity for whānau, communities and the Waikato region.

Whatungarongaro te tangata, toitū te whenua – As people disappear from sight, the land remains. It is beholden on us to work together towards a sustainable economic future for the generations to come.

In closing, we thank all those organisations and individuals that contributed to this report. We also acknowledge the authors of this report.

Nā mātou



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Māori population is young with **34%** of the Waikato region's population under 15 being Māori

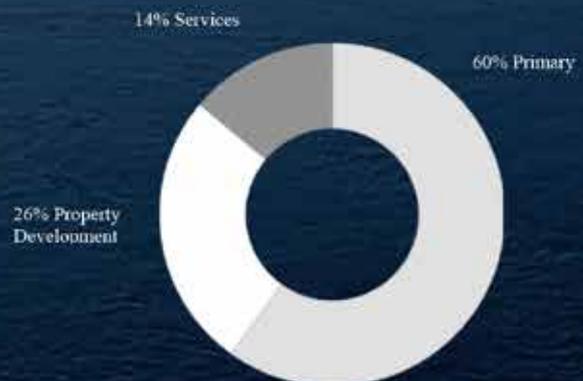
Government contributes **21%** to Waikato Māori household income

Māori earn **\$189** per week less than non-Māori in the Waikato region

Total Māori asset base of **\$6.2 Bn** in the Waikato region

26%

of the Māori collective asset base in New Zealand is in the Waikato region. The majority of the collective asset base in the region is in the Primary Sector & Property Development.



42,100 Māori are employed in the Waikato region

Māori contribute **8%** to the total GDP in the Waikato region



1 INTRODUCTION

1.1 PURPOSE OF REPORT

This report provides an up to date and comprehensive collection of quantitative data and empirical evidence about the nature and state of the Māori economic contribution in the Waikato region. It aligns with many of the recommendations of He Kai Kei Aku Ringa (2012), the Māori Economic Development Strategy and Action Plan, and will assist in understanding and establishing the most significant drivers of future economic success for Māori in the region. The report will inform the implementation of the Waikato regional economic development strategy.

Māori economic development is important not only for Māori, but for the overall economic performance of the Waikato region and New Zealand as a whole. For the economy of the Waikato region to achieve its long-run potential growth, it must make the best use of all available resources. This report assesses the economic contribution that Māori make to the Waikato region. This was achieved by looking at the economic contribution of Māori in the Waikato region across three elements – assets, businesses and people.

ECONOMIC CONTRIBUTION BY MĀORI TO THE WAIKATO REGION

ASSETS

BUSINESSES

PEOPLE

'Assets' refers to the Māori asset base, which is made up of collectively owned assets held by Māori as well as the assets held by businesses of Māori employers and self-employed.

'Businesses' refers to the overall Māori economic contribution in terms of gross domestic product (GDP).

'People' refers to the contribution that Māori make to the economy through earning salaries and wages and spending these salaries and wages in the economy.

1.2 WORKING DEFINITION OF THE MĀORI ECONOMY

A broad definition of the Māori economy has been adopted in order to provide the scope necessary to capture all people, entities and enterprises that self-identify as Māori. The Māori economy for the purpose of this report is derived from the previous work that has been completed by BERL on the national Māori economy (see 'method and definitions' section). The Māori economy in the Waikato region has many dimensions and for the purposes of quantifying the economy, we focus on Māori employment, income, spending and the asset base. This report estimates the size of the Māori economy across some of these dimensions, and illustrated the relationships between the Māori economy in the Waikato region and the wider New Zealand economy. Various dimensions are presented to highlight that the contribution of the Māori economy cannot be summarised by one number or percentage.

The participation in, and contributions to, an economy of an industry, sector or population group can be described across many dimensions. This report explicitly looks at the economic contribution of Māori to the Waikato region.

1.3 METHOD AND DEFINITIONS

This report has been compiled using various sources of data and modelling. In particular, it relies heavily on the methodology, modelling and research from BERL's:

- 'Asset base, income, expenditure and GDP of the 2010 Māori economy' report commissioned by the Māori Economic Taskforce in 2011; and
- 'Māori Asset Base in the Waiariki Economy' report commissioned by Te Puni Kōkiri in 2009.

A full description of the methodology used to calculate the economic contribution of Māori in the Waikato region is provided in Section 9 of this report.

Every effort has been made to use latest available data sources. All information presented is therefore in 2012 values unless otherwise stated. At the time of preparing this report, detailed Māori population data from the 2013 Census was available.¹ This data has been used in the 'Demographic profile' section of this report.

Definition of the Waikato region

This report defines the Waikato region using Statistics New Zealand regional council boundaries for all aspects of the report apart from 'collectively owned assets'. For 'collectively owned assets', the Waikato region is defined in terms of Office of Treaty Settlement boundaries.

Eleven territorial authorities are, either fully or partially, within the boundaries of the Waikato Regional Council. Nine of these territorial authorities are fully within the boundaries of the regional council: Thames-Coromandel district, Hauraki district, Waikato district, Matamata-Piako district, Hamilton city, Waipa district, Otorohanga district, South Waikato district, Waitomo district. The majority of Taupō district boundaries are within the boundaries of the Waikato Regional Council. A small part of Rotorua district boundaries are within the Waikato Regional Council boundaries.

This report, where possible, provides breakdowns of the territorial authorities within the Waikato Regional Council boundaries.³ Where breakdowns are provided, the nine territorial authorities that are fully within the boundaries are presented. The entire Taupō district, including the small areas that are outside the Waikato Regional Council boundaries, is also presented⁴. Rotorua district is not presented due to a large amount of employment and economic activity in the district occurring outside of the Waikato region. This means that the sum of the territorial authorities presented will not equal the Waikato Regional Council totals provided.

For the collectively owned asset base, Office of Treaty Settlement boundaries were used to define the coverage of the region. Settlement boundary areas identified as being in the Waikato region were: Ngāti Te Ata, Ngāti Tamaoho, Hauraki, Waikato-Tainui (Raupatu), Waikato-Tainui (River and

¹ Detailed 2013 Census employment data for Māori in the Waikato region was not available when preparing this report.

² Assets held in collective ownership through Māori authorities such as trusts and incorporations, rūnanga, and Treaty settlement entities.

³ For a graphical outline of the territorial authorities within the boundaries of the Waikato region, see <http://www.lgnz.co.nz/assets/North-Island-PNG.PNG>

⁴ Most employment and economic activity within the Taupo District occurs within the boundaries of the Waikato Regional Council.



other claims), Waitomo, Ngāti Maniapoto, Maraeroa A&B, Pouakani, Ngāti Raukawa, Ngāti Korokī Kahukura, and Ngāti Haua. Settlement boundaries within the region that have been previously used to calculate the asset base of other areas were excluded from our definition of the region to minimise double counting.

The definition of the Waikato region for the collectively owned asset base does not directly align with the coverage of the Waikato Regional Council. In the broadest sense, differences in the definition largely occur because collective asset base: (1) includes Ngāti Maniapoto, which is part of the Waikato, Taranaki and Manawatu-Whanganui regional councils, and (2) does not cover the parts of Rotorua district that are included in the Waikato Regional Council boundary areas.

The iwi covered by the settlement areas used to estimate the value of collectively owned assets in the Waikato region are: Ngāi Tai (Hauraki), Ngāti Hako, Ngāti Hauā, Ngāti Hei, Ngāti Kearoa / Ngāti Tuarā, Ngāti Korokī Kahukura, Ngāti Maniapoto, Ngāti Maru (Hauraki), Ngāti Paoa, Ngāti Porou ki Harataunga ki Mataora, Ngāti Pūkenga ki Waiau, Ngāti Rāhiri Tumutumu, Ngāti Tahu / Ngāti Whaoa, Ngāti Tamaoho, Ngāti Tamaterā, Ngāti Tara Tokanui, Ngāti Turangitukua, Ngāti Tuwharetoa, Ngāti Whanaunga, Patukirikiri, Pouākani, Ngāti Raukawa, Rereahu, Waikato, Ngāti Hinerangi.

1.4 REPORT STRUCTURE

The rest of the report is structured as follows:

- Section 2 provides a short demographic profile of Māori in the Waikato region
- Section 3 gives an overview of the Māori asset base in the Waikato
- Section 4 examines the Māori asset base of the Waikato in terms of collectively owned assets
- Section 5 takes a closer look at the Māori asset base of the Waikato region in terms of the assets held by businesses of employers and self-employed enterprises
- Section 6 examines the Māori contribution to the Waikato economy in terms of GDP
- Section 7 looks at the contribution Māori people make to the economy of the Waikato region through income and expenditure
- Section 8 provides a full description of the methodology and definitions used in this report.

A separate short executive summary that outlines key observations for the Waikato Māori economy from this situational analysis supplements this report.

2 DEMOGRAPHIC PROFILE

In 2013, 21.9 percent of the resident population in the Waikato region identified as Māori compared to 14.9 percent nationally. Just over a third of Māori in the Waikato region are in Hamilton city. As is the case nationally, Māori in the Waikato region have a young age profile.

This section provides a short demographic profile of the Māori population in the Waikato region. This profile is based on data from Statistics New Zealand's 2013 Census, which provides information on Māori ethnicity. Whilst this report focuses on Māori ethnicity, it is useful to note that the Census also captures information about Māori descent.⁵ Annex 1 provides a short profile of Māori descent using Census data.

2.1 MĀORI IN THE WAIKATO REGION

In 2013, 21.9 percent of the resident population in the Waikato region identified as Māori compared with 14.9 percent nationally.

Māori in the Waikato region made up 14 percent of all resident Māori in New Zealand in 2013. Table 2.1 shows the Māori resident and total resident population in the Waikato region in 2006 and 2013. Between 2006 and 2013 the usual Māori resident population in the Waikato region grew by 9.6%, compared to 5.9% nationally.

The proportion of people in the Waikato region that identified as Māori increased from 21.0% in 2006 to 21.9% in 2013. This growth was greater than the overall growth of people identifying as Māori nationally, which increased from 14.6% to 14.9% over the same period.

Table 2.1: Resident Māori population in the Waikato region and New Zealand, 2006 and 2013

	Māori Population			Total Stated Population #			Māori Population (%)		
	2006	2013	% Change 2006-2013	2006	2013	% Change 2006-2013	2006	2013	Change 2006-2013
Waikato Region	76404	83742	9.6%	363477	382536	5.2%	21.0%	21.9%	0.9
New Zealand	565329	598602	5.9%	3860163	4011402	3.9%	14.6%	14.9%	0.3

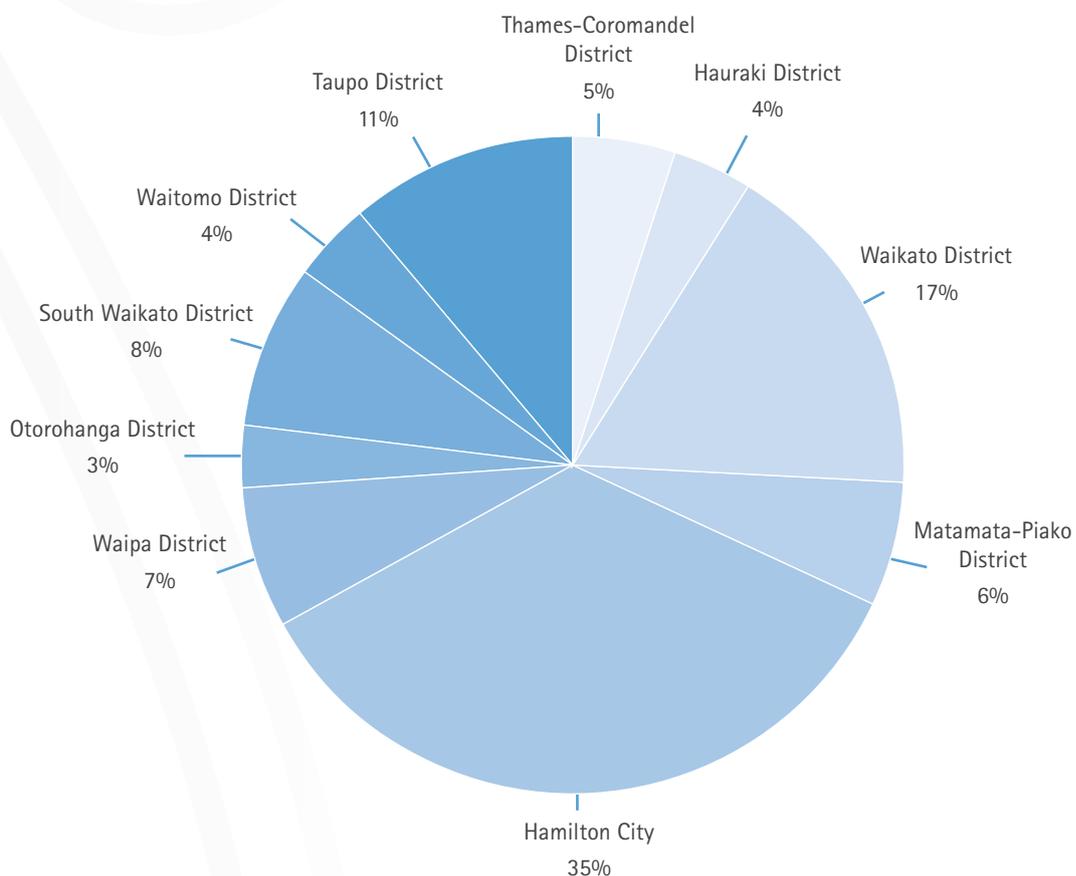
Source: Statistics New Zealand 2013 and 2006 Censuses of Population and Dwellings
Total Stated Population' excludes residual categories (not elsewhere included)

At a territorial authority level, just over a third of the Māori population in the Waikato region were in Hamilton city in 2013. Other districts with that had a large number of Māori in 2013 were Waikato district (17 percent) and Taupō district (11 percent). Figure 2.1 shows a breakdown of the resident Māori population in the Waikato region in 2013.

⁵ Māori ethnicity and Māori descent are different concepts – ethnicity refers to cultural affiliation, while descent is about ancestry. A person has Māori descent if they are of the Māori race of New Zealand; this includes any descendant of such a person. This definition requires people to know their biological ancestry. The concept of ethnicity differs from that of descent, having a social & cultural base, as opposed to a biological base.



Figure 2.1: Resident Māori population in the Waikato region by district, 2013

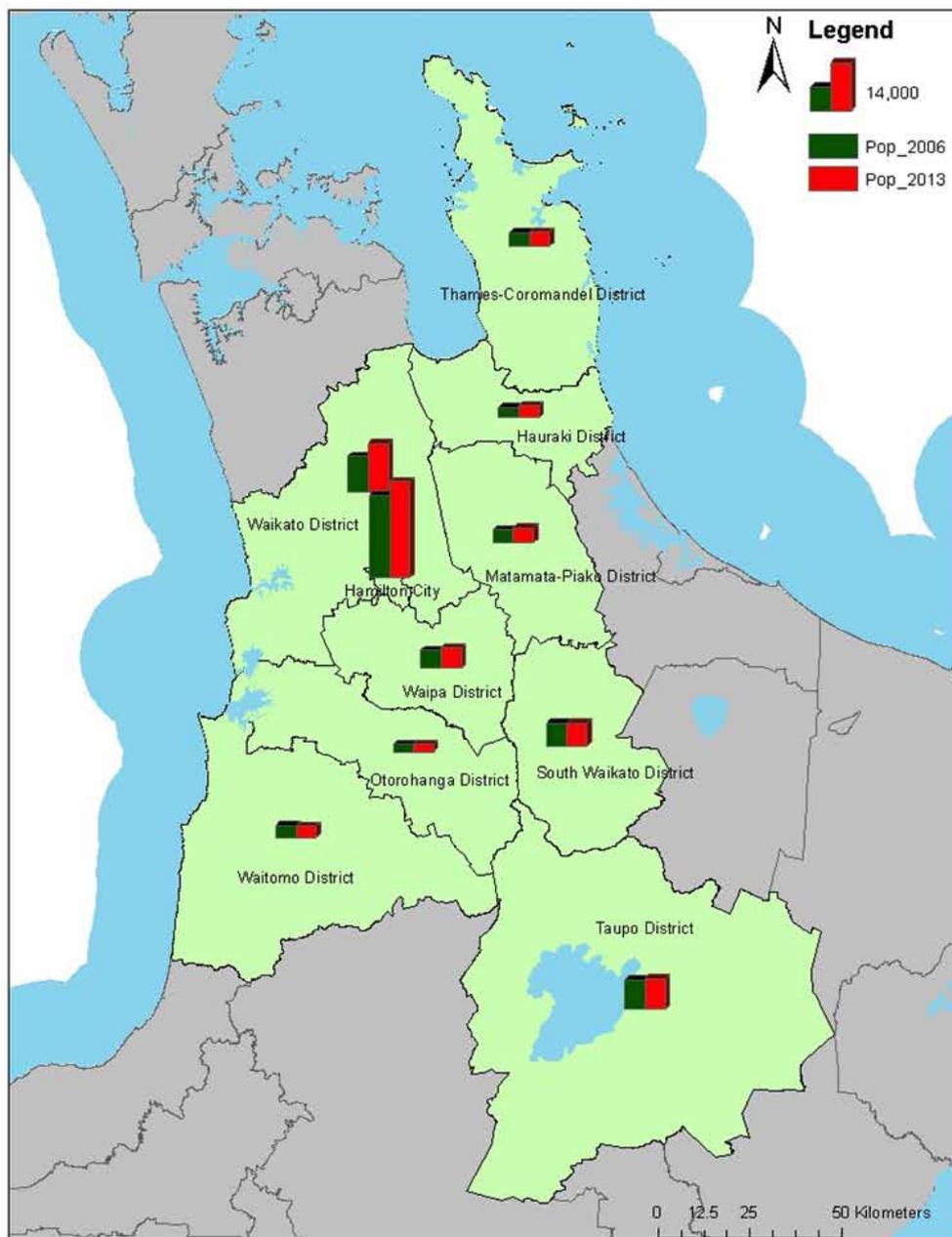


Source: Statistics New Zealand 2013 Census of Population and Dwellings

The proportion of Māori in the Waikato region is above the national average (14.9 percent) in eight out of 10 territorial authorities. In 2013, almost 42 percent of the population in the Waitomo district identified as being Māori while the proportion was also high in South Waikato, Taupō, Ōtorohanga and Waikato districts.

For 2006 and 2013, the Māori population growth was significant in Hamilton city (16.3 percent); Matamata-Piako district (15.6 percent) and Waipa district (13.7 percent). Conversely, the Māori population declined in the Waitomo district (down 3.7 percent) and in Otorohanga district (down 0.5 percent). Figure 2.2 shows the change in the Māori population in the Waikato region by district from the 2006 and 2013 Censuses.

Figure 2.2: Resident Māori population in the Waikato region by district, 2006 and 2013



Source: Statistics New Zealand's 2013 and 2006 Censuses of Population and Dwellings

The proportion of Māori increased in nine out of the 10 districts in the Waikato region for 2006 and 2013. Hauraki district had the largest increase in the proportion of Māori population, increasing from 19.2 percent in 2006 to 21.2 percent in 2013.

Whilst the Māori population increased in the Waikato district between the censuses (up 9.3 percent), overall population growth in the district of 24.4 percent, resulted in a reduction in the

share of Māori population in the district from 24.4 percent in 2006 to 24.2 percent in 2013.

Despite declines in the Māori usual resident population⁶ between censuses in the Waitomo and Otorohanga districts, the share of Māori in these districts increased. This resulted from a greater overall population decline in these districts (down 6.1 percent in Waitomo district and 1.2 percent in Otorohanga district) compared to the decline in the Māori population (down 3.1 percent in Waitomo district and 0.5 percent in Otorohanga district).

Table 2.2: Resident Māori population in the Waikato region by district, 2013, 2006

	Māori Population			Total Stated Population #			Māori Population (%)		
	2006	2013	% Change 2006-2013	2006	2013	% Change 2006-2013	2006	2013	Change 2006-2013
Thames-Coromandel District	4,017	4,149	3.3%	25,050	25,017	-0.1%	16.0%	16.6%	0.6
Hauraki District	3,318	3,591	8.2%	17,274	16,941	-1.9%	19.2%	21.2%	2.0
Waikato District	13,173	14,403	9.3%	53,943	59,400	10.1%	24.4%	24.2%	-0.2
Matamata-Piako District	3,882	4,488	15.6%	29,466	30,315	2.9%	13.2%	14.8%	1.6
Hamilton City	24,603	28,605	16.3%	123,699	134,211	8.5%	19.9%	21.3%	1.4
Waipa District	5,382	6,120	13.7%	41,145	44,493	8.1%	13.1%	13.8%	0.7
Otorohanga District	2,358	2,346	-0.5%	8,742	8,634	-1.2%	27.0%	27.2%	0.2
South Waikato District	6,714	6,762	0.7%	21,291	20,757	-2.5%	31.5%	32.6%	1.1
Waitomo District	3,642	3,528	-3.1%	8,997	8,448	-6.1%	40.5%	41.8%	1.3
Taupo District	8,646	9,030	4.4%	30,681	31,131	1.5%	28.2%	29.0%	0.8
Waikato Region	76,404	83,742	9.6%	363,477	382,536	5.2%	21.0%	21.9%	0.9
New Zealand	565,329	598,602	5.9%	3,860,163	4,011,402	3.9%	14.6%	14.9%	0.3

Nationally, Māori have a young age profile compared to the total population. In 2013, 34 percent of the Māori population was under 15 years of age. This compares to 20 percent of the total national population which was under 15 years of age.

The age distribution of Māori in the Waikato region is similar to the age distribution of Māori nationally. In 2013, 58 percent of resident Māori population in the Waikato region were under 30 years of age. Table 2.3 shows the age distribution of Māori in the Waikato region.

⁶ The census usually resident population count of New Zealand is a count of all people who usually live, and are present, in New Zealand on a given census night. This count excludes visitors from overseas and excludes residents who are temporarily overseas on census night.

Table 2.3: Age distribution of the Māori population in the Waikato region, 2013

	14 years & under		15 – 29 years		30–49 years		50 – 64 years		65 years +	
	Number	%	Number	%	Number	%	Number	%	Number	%
Thames-Coromandel District	1359	33%	786	19%	948	23%	684	16%	369	9%
Hauraki District	1272	35%	759	21%	780	22%	540	15%	243	7%
Waikato District	5043	35%	3108	22%	3528	24%	1974	14%	750	5%
Matamata-Piako District	1665	37%	1062	24%	1011	23%	528	12%	216	5%
Hamilton City	9654	34%	8301	29%	6642	23%	2919	10%	1083	4%
Waipa District	2103	34%	1383	23%	1398	23%	894	15%	345	6%
Otorohanga District	765	33%	546	23%	507	22%	354	15%	162	7%
South Waikato District	2412	36%	1491	22%	1545	23%	915	14%	399	6%
Waitomo District	1167	33%	765	22%	825	23%	525	15%	249	7%
Taupo District	2949	33%	2034	23%	2166	24%	1284	14%	597	7%
Waikato Region	28662	34%	20415	24%	19521	23%	10704	13%	4443	5%
New Zealand	202320	34%	144081	24%	142815	24%	77211	13%	32178	5%

Source: Statistics New Zealand 2013 Census of Population and Dwellings

Within the Waikato region, Hamilton city and Matamata-Piako district have a higher percentage of Māori aged less than 30 years (63 and 61 percent respectively). The resident Māori population over 50 years in Thames-Coromandel district is larger than is the case nationally (25 percent compared to 18 percent nationally).



3 ASSETS

The Māori asset base in the Waikato region in 2012 was estimated at \$6.2 billion, accounting for 15 percent of total Māori assets in New Zealand.

ECONOMIC CONTRIBUTION BY MĀORI TO THE WAIKATO REGION

ASSETS

BUSINESSES

PEOPLE

This section summarises the value of the Māori asset base in New Zealand and the Waikato region. The types of Māori assets in the Waikato region by industry are also presented.

This report defines and measures the Māori asset base in terms of:

- Collectively owned assets - the assets of trusts, incorporations and other Māori entities; and
- Assets of Māori businesses:
 - businesses of self-employed Māori (without employees); and
 - businesses of Māori employers (with employees)⁷.

3.1 MĀORI ASSET BASE IN NEW ZEALAND

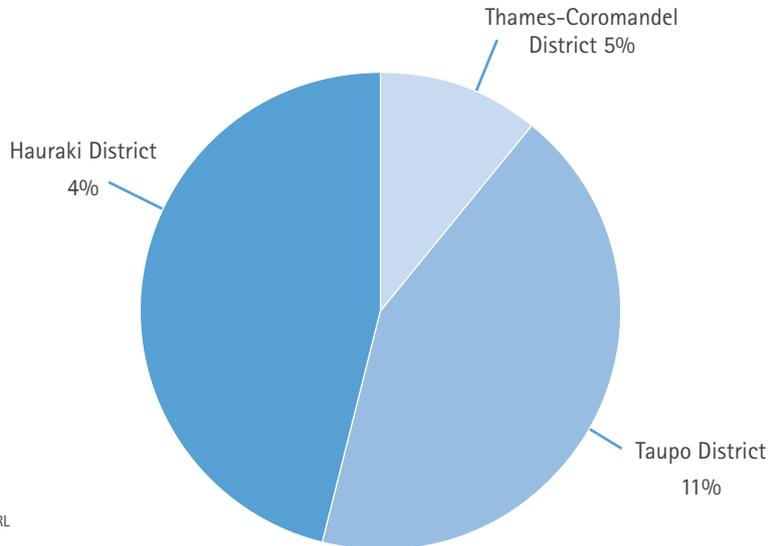
The total asset base of the 2012 Māori economy in New Zealand is estimated at \$40.0 billion. This asset base is comprised of businesses of Māori employers of \$23.3 billion (58 percent), businesses of self-employed Māori of \$5.9 billion (15 percent) and the assets of trusts, incorporations and other Māori entities of \$10.8 billion (27 percent).

3.2 MĀORI ASSET BASE COMPOSITION IN THE WAIKATO REGION

The Māori asset base in the Waikato region for 2012 was estimated at \$6.2 billion or 15 percent of total Māori assets in New Zealand. This is comprised of businesses of Māori employers of \$2.6 billion (43 percent), businesses of self-employed Māori of \$668 million (11 percent), and assets of trusts incorporations and other Māori entities of \$2.9 billion (46 percent). Figure 3.1 shows the composition of the Māori asset base in the Waikato region.

⁷ This definition of the Māori asset base was developed by BERL in the report 'The Asset Base, Income, Expenditure and GDP of the 2010 Māori Economy' for the Māori Economic Development Taskforce in 2011.

Figure 3.1: Māori asset base in the Waikato region, 2012



Source: BERL

Māori asset base composition in the Waikato region by industry

The agriculture, forestry & fishing and property & business services industries make a significant contribution to the Māori asset base in the Waikato region. In 2012, assets held by Māori in the agriculture, forestry and fishing industry made up 28 percent (or \$1.7 billion) of the total Māori asset base in the region, while the property & business services industry made up 23 percent (or \$1.4 billion).

Other important contributors to the Māori asset base in the Waikato region in 2012 were manufacturing (15 percent) and education (five percent). Table 3.1 summaries the contribution that different industries make to the Māori asset base for the Waikato region and New Zealand.

Table 3.1: Māori asset base in the Waikato region and New Zealand by industry, 2012 (\$m)

	Waikato		New Zealand	
	Assets (\$m)	% of Total Assets	Assets (\$m)	% of Total Assets
Agriculture, Forestry and Fishing	1,702	28%	11,665	29%
Mining	5	0.1%	5	0%
Manufacturing	925	15%	3,046	8%
Electricity, Gas and Water Supply	203	3%	270	1%
Construction	163	3%	1,399	3%
Wholesale Trade	127	2%	967	2%
Retail Trade	177	3%	1,596	4%
Accommodation, Cafes and Restaurants	40	1%	303	1%
Transport and Storage	233	4%	2,373	6%
Communication Services	169	3%	1,640	4%
Finance and Insurance	170	3%	1,654	4%
Property and Business Services	1,403	23%	7,534	19%
Government Administration and Defence	-	0%	-	0%
Education	302	5%	1,563	4%
Health and Community Services	182	3%	570	1%
Cultural and Recreational Services	257	4%	4,347	11%
Personal and Other Services	-	0%	-	0%
Not Elsewhere Included	122	2%	1,096	3%
Total All Industries	6,180	100%	40,028	100%



Māori asset base composition in Waikato in relation to the rest of New Zealand

The Māori asset base of the Waikato region is 15 percent of the total Māori asset base in New Zealand (\$40.0 billion) for 2012. The contribution of Māori assets in the Waikato relative to overall Māori assets was high in:

- Electricity, gas & water supply: assets held by Māori in the region made up 75 percent of all electricity, gas & water supply assets in the Māori asset base. The Tuaropaki geothermal power located in Taupō accounts for the large majority of these assets Waikato region.
- Health & community services: assets held by Māori in the region made up 32 percent of all health & community services in the total Māori asset base for New Zealand. The Waikato region has a large number of Māori health and social service providers.
- Manufacturing: assets held by Māori in the region made up 30 percent of all manufacturing assets in the Māori asset base. The Miraka whole milk processing plant located on Tuaropaki land in Taupō is the main contributor of Māori manufacturing assets in the region.
- Property & business services: assets held by Māori made up 19 percent of all property and business services assets in Māori the asset base. A large contributor to the proportion is likely due to the large scale property & business services activities undertaken by Tainui Group Holdings Limited in the region and the associated flow in employment.
- Education: in 2012, assets held by Māori in the region made up 19 percent of all education assets in the total Māori asset base for New Zealand. The high proportion is likely due to the large number of education institutions in the region. Te Wānanga o Aotearoa, the third largest education institute in New Zealand after the University of Auckland and the Open Polytechnic is based in the Waikato region, as is the University of Waikato and the Waikato Institute of Technology (Wintec).

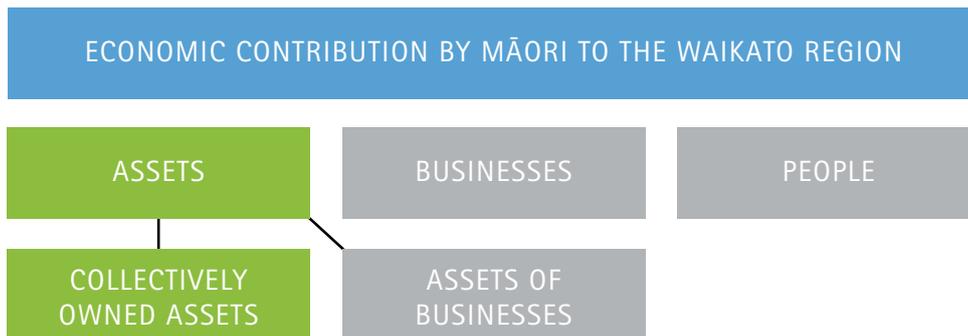
Table 3.2 provides a summary of the makeup of the Māori asset base in the Waikato region. Section 4 of this report examines the collectively owned asset base of Waikato Māori, while Section 5 looks at the assets held by Māori self-employed and employers in the region.

Table 3.2: Components of the Māori asset base in the Waikato region, 2012 (\$m)

	Waikato Māori Asset Base, 2012 \$m			
	Self-employed	Employed	Collectively owned assets	Total
Agriculture, Forestry and Fishing	249	517	936	1,702
Mining	-	-	5	5
Manufacturing	32	320	573	925
Electricity, Gas and Water Supply	-	-	203	203
Construction	39	124	-	163
Wholesale Trade	16	110	-	127
Retail Trade	24	153	-	177
Accommodation, Cafes and Restaurants	3	37	-	40
Transport and Storage	27	206	-	233
Communication Services	30	139	-	169
Finance and Insurance	6	165	-	170
Property and Business Services	154	503	747	1,403
Government Administration and Defence	-	-	-	-
Education	7	146	149	302
Health and Community Services	5	45	132	182
Cultural and Recreational Services	41	98	118	257
Personal and Other Services	-	-	-	-
Not Elsewhere Included	37	85	-	122
Total All Industries	668	2,649	2,863	6,180
Total All Industries as a percentage of total asset base	11%	43%	46%	100%

4 COLLECTIVELY OWNED ASSETS

The assets of trusts, incorporations, rūnanga, Treaty settlement entities and Māori entities contribute \$2.9 billion (46 percent) to the overall Māori asset base of the Waikato region.



Government policy and legislation has shaped the ownership and governance arrangements around the Māori asset base in the Waikato region. As such, a substantial proportion of the asset base in the Waikato region is held in collective ownership through Māori authorities such as trusts and incorporations, Treaty settlement entities and other Māori entities such as rūnanga and not for profit organisations.

This section provides an overview of Māori collectively owned assets in the Waikato region. It outlines the contribution of Māori collectively owned assets to the overall Māori asset base of the Waikato; and investigates the Waikato Māori asset base in terms of:

- ahu whenua trusts
- Māori land incorporations
- Treaty of Waitangi settlements.

The Māori collectively owned asset base also includes assets held by rūnanga and Māori not for profit organisations. While this section does not highlight the assets held by these Māori entities, their asset values have been included as part of the overall collectively owned asset base of Māori in the Waikato region.⁸

4.1 MĀORI COLLECTIVELY OWNED ASSETS IN THE WAIKATO REGION

In 2012, Māori collectively owned assets in the Waikato region were worth \$2.9 billion.⁹ These collectively owned assets make up 26 percent of total Māori collectively owned assets in New Zealand (\$10.8 billion).¹⁰ Māori collectively owned assets contribute 46 percent to the overall Māori asset base in the Waikato region (\$6.2 billion).

The collectively owned assets held by Māori in the Waikato region fit into three broad categories: property development¹¹, the primary industry¹² and services¹³. Figure 4.1 shows Māori collectively

⁸ Current accounting practices mean that not-for profit organisations are not required to make annual financial returns publicly available. Where asset values of known Māori not-for-profit organisations are available, they have been included as part of the overall collectively owned asset base of Māori in the Waikato region.

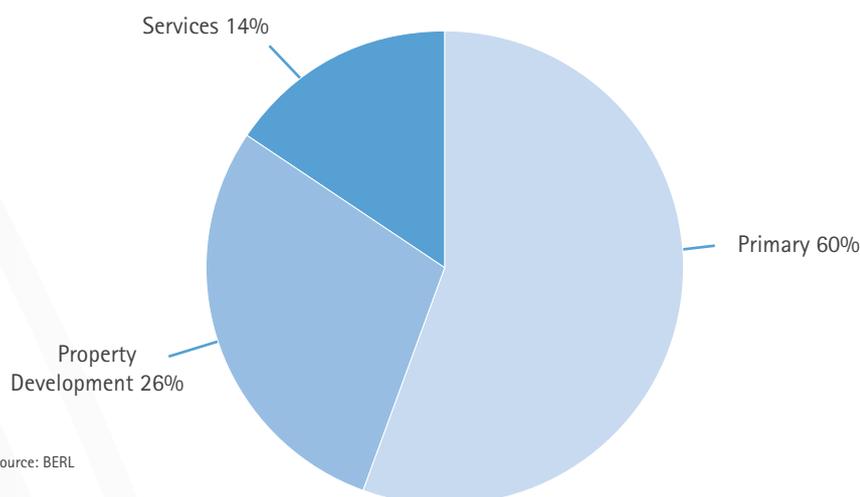
⁹ The Māori collectively owned asset base in the Waikato region includes the significant assets held by Tuaropaki Trust in the areas of agriculture, dairy processing, horticulture, geothermal power generation and telecommunications. The assets of Tuaropaki Trust were not included in the detailed 'Report on the Maori Asset Base in the Waiariki Economy' prepared in 2009 but were included in the later 'Situational Analysis: Maori contribution and position of the Bay of Connections economy' report prepared for the Bay of Plenty Regional Council in 2012.

¹⁰ The Māori collectively owned asset base in the Waikato region includes post 2010 Treaty of Waitangi Settlements and, where available, 2012 asset values. The New Zealand Māori collectively owned asset base, with the exception of assets relating to the Waikato region, is based on 2010 asset values and does not include post-2010 Treaty of Waitangi Settlements. We therefore recommend caution when interpreting comparisons between the Māori collectively owned asset base in the Waikato region to the total Māori collective asset base.



owned asset base in the Waikato region broken down into these three broad industry groupings.

Figure 4.1: Māori collectively owned assets in the Waikato region, 2012 (%)¹⁴



Source: BERL

Further breakdowns of Māori collectively owned assets by industry in the Waikato region and the rest of New Zealand are provided in Table 4.1.

Table 4.1: Māori collectively owned assets by industry in Waikato and New Zealand, 2012 (\$m)

Collective Asset Base - \$m	Waikato	Rest of NZ	NZ
Agriculture	716	1980	2696
Forestry	125	2237	2362
Fishing	95	987	1082
Energy	203	67	270
Mining	5	0	5
Processing	573	0	573
Property Development	747	275	1022
Services	399	2396	2795
Others (e.g. Cash)	0	8	8
Total	2863	7951	10814

Source: BERL

The primary industry (agriculture, forestry, processing, fishing, energy and mining) contributes 60 percent to overall Māori collectively owned assets in the region. Within the primary industry, large contributors to the Māori collectively owned asset base in the Waikato region were agriculture, contributing 25 percent of the asset base, and dairy processing contributing 20 percent. The energy industry contributes seven percent to the regions collectively owned asset

¹¹ Property development includes urban and commercial property development

¹² Primary industry includes agriculture, forestry, processing, fishing, energy and mining.

¹³ Services includes education services, health services (e.g., counselling, housing assistance) and broadcasting

¹⁴ Property development includes urban and commercial property development; Services includes education services, health services (e.g., counselling, housing assistance) and broadcasting.

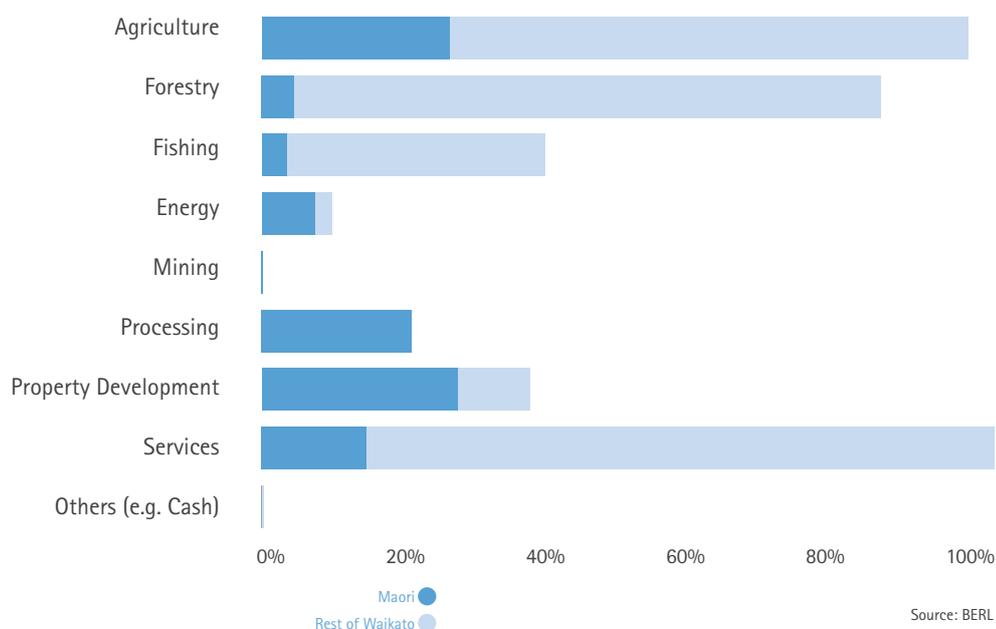
base while forestry and fishing contribute four and three percent respectively.

Property development¹⁵ makes up 26 percent of overall collectively owned assets for Māori in the Waikato region. Furthermore, property development collectively owned assets held by Māori in the Waikato region make up 73 percent of all collectively owned property development owned by Māori nationally.

Māori in the Waikato region also hold \$399 million of collectively owned assets in the services industry¹⁶. These assets make up 14 percent of all collectively owned assets held by Māori in the Waikato region.

Figure 4.2 shows the share of Māori collectively owned assets in the Waikato region as a proportion of all Māori collectively owned assets in New Zealand by industry for 2012.

Figure 4.2: Māori collectively owned assets by industry in Waikato and New Zealand, 2012



All New Zealand Māori collectively owned assets in the mining industry were found in the Waikato region. The Māori land incorporation 'Taharoa C Block – Mining' contributes over 99 percent of Māori collectively owned assets in mining in the Waikato region. At Taharoa, iron sand is mined, concentrated, and exported to China and Japan.

All recorded Māori collectively owned processing assets in New Zealand are located in the Waikato region. The Miraka whole milk powder processing plant, located on Tuaropaki land in the Taupō district, is the main contributor of these assets. The Tuaropaki Trust is a cornerstone shareholder of Miraka Limited. Miraka Limited is also backed by Wairarapa Moana Incorporation; Vinamilk (Vietnam); The Māori Trustee, Waipapa 9 Trust; Hauhungaroa Partnership; Tauhara Moana Trust; Huiarau Trust; Te Awahohonu Forest Trust Limited; Global Dairy Network and Te Putahitanga o Nga Ara Trust.

Seventy five percent of Māori collectively owned assets in the energy industry are found in the Waikato region. These assets largely come from the Tuaropaki geothermal power station, which

¹⁵ Includes urban and commercial property development

¹⁶ Within the Māori asset base, the services industry includes education services, health services, health services (e.g., counselling, housing assistance) and broadcasting



generates energy from the Mokai geothermal energy field, located under Tuaropaki Trust land.

The majority of Māori collectively owned assets in the property development industry (73 percent) were found in the Waikato region. Tainui Group Holdings Limited (TGHL) is the main contributor of property development in the Waikato region. In 2012, Tainui Group Holdings had \$694 million in assets, of which approximately 85 percent were in the property development and investment industry. One of the key objectives of TGHL is to maximise wealth, provide long term returns, and consistent dividends to its shareholder.¹⁷

Māori collectively owned assets in the agriculture industry in the Waikato region make up 21 percent of total agricultural assets. Within the region there is a mixture of incorporations and ahu whenua trusts with large sheep & beef and dairy activities. These include Wairarapa Moana ki Pouakani Incorporation, Tuaropaki, Te Hape B and Tiroa B Trust. Along with these large agriculture activities, a number of medium sized ahu whenua land areas are also used for agricultural activities.

4.2 AHU WHENUA TRUSTS

Ahu whenua trusts promote the use and administration of land in the interest of their owners.¹⁸ These trusts are governed by trustees, often a board, who manage the land on behalf of the owners. These land blocks have multiple owners, ranging from 20 to over 10,000, who are related by whakapapa (extended family ties). These owners have a cultural and shareholder interest in the land.

The areas of Māori land are difficult to ascribe to given geographic regions without the use of Geographic Information System (GIS) databases. Over the past 12 months Waikato Regional Council has had interaction with the five River Iwi Trusts in the region who are at various stages of establishing effective GIS capabilities. Together, these trusts have interests which cover a large percentage of the Waikato region. In each case, the Trusts' geographic area is legally defined through the settlement process (SO 409144). Further work could be undertaken with the Trusts to obtain further information which may lead to greater accuracy and increased comprehensiveness for the region if the data is available.

Using the information in the collectively owned asset base, combined with a range of sources, like the Federation of Māori Authorities, estimates there are 1,100 ahu whenua trusts in the Waikato region. The total land area of these trusts is approximately 64,900 hectares. Table 4.2 summarises ahu whenua trusts in the Waikato region by broad geographic trust group.

¹⁷ Tainui Group Holdings Limited & Waikato-Tainui Fisheries Limited (2013), Tainui Group Holdings Annual Report 2013, p. 20 and p.42

¹⁸ http://www.justice.govt.nz/courts/Māori-landcourt/documents/publications/booklets/Māori%20Land%20Trusts.pdf#at_download/file

Table 4.2: Ahu whenua trusts in the Waikato region by geographic trust group

Geographic Trust groups	Trusts in Group Number	Total group area Hectares
Tiroa E	1	6100
Te Hape	8	4600
Tuaropaki Trust	1	3900
Taharoa Forest Trusts	30	2900
Taumatatotara	3	2500
Hauturu	13	2400
Rangitoto A	13	2200
Waipa	16	2100
Pakirarahi	3	2000
Mangaawakino	5	2000
Aramiro	1	2000
Wharepuhunga / Aotearoa	5	1900
Kinohaku West	15	1700
Umuhapuku	7	1700
Harataunga	8	1700
Te Akau	10	1300
Arapae	3	1200
Maungatautari	32	900
Pirongia West	4	600
Taupiri	11	500
19 large groups	190	44200
Other Trusts	910	20700
All Trusts	1100	64900

Source: BERL

A small number of ahu trusts administer very large areas of land and are presumably operating as forest and farm production units. The 20 larger ahu whenua trust groups (17 percent of all ahu whenua trusts in the region) administer an average land area of 233 hectares while the remaining 83 percent of ahu whenua trusts in the region administer an average land area of 23 hectares. Furthermore, 33 percent of all ahu whenua trusts administered an average land area of less than five hectares. These small areas of land are likely to be sections with housing on them or land that is vacant.

Ahu whenua trusts in the Waikato, where the asset value was identifiable, ranged in value from \$180,000 to just under \$1 billion. The activities of these trusts were largely in the primary sector – forestry and sheep and beef farming and dairy processing as well as geothermal energy. A small number of trusts were involved in mining or providing services.

As part of this project, interviews were undertaken with a small number of ahu whenua trusts to obtain a greater understanding of their asset base, activities, future planning and communication with its beneficiaries. Common themes from these interviews include¹⁹:

¹⁹ Ahu whenua trusts interviewed and highlighted in this report are large, well-known and successful trusts. They may not be reflective of all ahu whenua trusts in the Waikato region.



- While the main activities of trusts are primarily in the forestry and sheep and beef farming industries, trusts are, where practical, increasingly looking at alternative and sustainable revenue streams
- Trusts are open to the idea of investigating joint ventures with other parties, provided they align with the objectives of the trust. This is typically done on a case by case basis. Gourmet Mokai, a 5.5 hectare climate controlled glasshouse on Tuaropaki land, is an example of a joint venture involving an ahu whenua trust. Under this joint venture, Tuaropaki Trust holds a 25 percent shareholding in Gourmet Mokai, Gourmet Paprika Ltd. has a 50 percent shareholding and the Hauhungaroa Partnership (Ngāti Parekawa) has a 25% shareholding.
- Trusts regularly develop, evaluate and revise short-medium term (three to five years) strategic plans. These plans include the use of assets and resources.
- Beneficiaries of trusts are typically kept informed via regular pānui and trustee meetings. Trustee meetings are often less frequent.

4.3 MĀORI INCORPORATIONS

Māori land incorporations have a structure similar to a company, but their purpose is to manage Māori freehold land²⁰ on behalf of its owners. These incorporations can include one or more blocks of Māori freehold land if at least one of the blocks has more than two owners. To establish Māori land incorporation, landowners apply to the Māori Land Court (MLC). Once Māori land incorporation has been constituted, it can acquire any type of land.²¹ The majority of Māori land incorporations are administered by their owners as a group; however they can also be administered by the Māori Trustee, Te Tumu Paeroa, the Guardian Trust or accountants.

11 incorporations were identified in the Waikato region. These incorporations and their associated land areas are outlined in Table 4.3.

Table 4.3: Main Incorporations in the Waikato region by land area

Main Incorporations	Land area Hectares
Wairarapa Moana Ki Pouakani	11600
Maraeroa C or Pukemako	5500
Mangapapa B2	4700
Mangaawakino A1	1200
Taharoa C	1300
Mataora 4	1200
Tainui Kawhia	1200
Waipa-Ranui	1100
Rangitoto A No 30B	600
Mangaora A	300
Maraetai No 11	100
Main incorporations	28800

Source: BERL

By matching Māori Land Court information about land size, with available relevant annual report and Department of Internal Affairs – Charities data, we were able to identify the asset value of

²⁰ Land where the beneficial ownership of which has been determined by the Māori Land Court by freehold order has the status of Māori freehold land

²¹ <http://www.justice.govt.nz/courts/Māori-land-court/documents/publications/booklets/Incorporations.pdf>

six Māori incorporations in the Waikato region. The land value of these organisations ranged from 1,200 hectares to 11,600 hectares while the asset value ranged from \$126,000 to \$152 million. The largest assets held by these organisations were in the forestry sector. Agricultural assets were the second largest asset held. The activities of incorporations with larger land area tended to be more diverse than incorporations with a smaller land area.

As part of this project interviews were undertaken with a small number of large, successful Māori incorporations to develop a greater understanding of their asset base, activities, future planning and communication with their beneficiaries. Common themes from these interviews include:

- While the activities of Māori incorporations, like ahu whenua trusts, are primarily in the forestry and sheep and beef farming industries, they often have investments in property. Furthermore, a number of Māori incorporations are actively looking at alternative and sustainable revenue streams, in order to attract investment. Maraeroa C Incorporation, which has a 5500 hectare commercial pine plantation in Pureora, is an example of an incorporation that has taken steps to develop an alternative revenue stream. Examples of activities undertaken by Maraeroa C to develop an alternative revenue stream include the development of a tourism facility (eco-cultural tours and experiences) and the plantation of Ginseng crops to export to China.
- Māori incorporations, like ahu whenua trusts, are open to the idea of investigating joint ventures with other parties, provided they align with the objectives of the trust. For example, Maraeroa C identified that it is investigating a joint venture to establish a rotational Ginseng crop. Another example Miraka Limited, New Zealand's first Māori owned whole milk powder plant, which is owned by a group of Māori trusts and incorporations including Wairarapa Moana Incorporation, Tuaropaki Trust, Waipapa 9 Trust, Hauhungaroa Partnership, Tauhara Moana Trust and Huairau Farms.
- Māori incorporations regularly develop, evaluate and revise three to five year strategic plans. They include future planned activities and the use of assets and resources.
- Māori incorporations typically use some of the returns from assets to leverage the skills of their people through the provision of grants. Such grants are usually in the area of education, health, cultural and sporting activities.
- In recent years, large Māori incorporations have developed websites and web-portals to keep shareholders informed. In addition to this, shareholders are kept informed via newsletters (typically biannual to quarterly) and through general meetings.

4.4 TREATY OF WAITANGI SETTLEMENT ASSETS

This section investigates the components of the Māori collectively owned asset base held by entities that have received Treaty of Waitangi settlements. Pending Treaty of Waitangi settlements in the Waikato region are also discussed as well as Māori Fisheries Act 2004 settlement assets.

Treaty of Waitangi settlement assets in the Waikato region

Treaty of Waitangi settlements included in the collectively owned asset base of the Waikato region are held and managed by the Waikato Raupatu Lands Trust, Ngāti Raukawa Settlement Trust, Te Pūtahitanga o Ngā Ara Trust, Ngāti Haua Iwi Trust, Taumatawiwi Trust and the Maraeroa A and B Trust. The total value of these entities in 2012 was \$1 billion. Table 4.4 shows the value of these settlement entities.



Table 4.4: Settlement entity assets in the Waikato region, value as at 2012, (\$m)²²

Settlement entity	Asset value (\$m)
Waikato Raupatu Lands Trust	925
Tuwharetoa Settlement Trust	70
Raukawa Settlement Trust	51
Te Pūtahitanga o Ngā Ara Trust	29
Taumatawiwi Trust	3
Maraeroa A and B Trust	2
Total	1080

Source: BERL, annual reports

The asset values in Table 4.4 above are the value of the settlement asset at 2012. The asset values include the original settlement quantum (the financial and commercial redress) plus the growth in the value of these assets. For example, the Te Pūtahitanga o Ngā Ara Trust received \$2.7 million in 2000, and this asset has now grown to \$29 million. The Taumatawiwi Trust received their asset quantum on 20 December 2012; therefore their asset value is the original settlement quantum.

The Waikato Raupatu Lands Trust is the largest settlement entity in the region, accounting for 90 percent of all the assets held by treaty settlement entities, in 2012. The Waikato Raupatu Lands Trust operates in the services, property development and fishing industries. The majority of activity undertaken by Waikato Raupatu Lands Trust is through its subsidiary company, Tainui Group Holdings Limited (TGHL). TGHL had assets worth \$738 million in the year ended 31 March 2013, and is largely focused on property development and investment.

Treaty settlement entities have added value to settlement quantum since settlement. Collectively, the value of the assets received by these entities has grown from just under \$300 million to just under \$900 million. Much of this growth has come from growth in the value of assets held by the Waikato Raupatu Lands Trust.

Further growth in the assets held by Treaty settlement entities is expected over the coming years through planned property development and investment. An example of this is provided by the joint venture between TGHL and Chedworth Properties to construct a \$3.3 billion inland transportation port and industrial hub at Ruakura. In August 2013, the Government agreed to fast-track resource consent applications by the joint venture between TGHL and Chedworth Properties to construct the inland port. TGHL estimate that if approved, the development of the inland hub could create some 740 new permanent jobs as well as construction work during development.²³

The overall asset base of Treaty settlement entities in the Waikato region is likely to also grow through the relativity clause in the Waikato-Tainui Raupatu – Lands Treaty settlement. Under this clause, which is outlined later in this section, Waikato-Tainui is entitled to claim up to, in 1994 real terms, 17 percent of the total value of settlement redress until 2044. This relativity clause was triggered in November 2012 and the Government transferred \$70 million to the Waikato-Tainui Raupatu Lands Trust in December 2012^{24 25}. Waikato-Tainui can make claims for additional payments every five years.

²² For the Waikato Raupatu Lands Trust, settlement assets are for the year ended 31 March 2013.

Post 2012, Ngāti Hauā received financial redress of \$13 million. This financial redress has been excluded from this table and the collectively owned assets held by Māori in the Waikato region in 2012.

²³ Scoop (30 August 2013) Tainui 'inland port' proposal to be fast-tracked through board of inquiry (accessed 12 January 2014)

A summary of Treaty settlements in the Waikato region is provided below. Treaty settlements outlined, also include the Ngāti Hauā settlement, which occurred after 2012.²⁶

Waikato-Tainui Raupatu – Lands (assets managed by the Waikato Tainui Raupatu Lands Trust)

In 1995, Waikato-Tainui became the first iwi to reach a Treaty of Waitangi settlement with the Crown for injustices that went back to the wars and land confiscations of the 1860s. The Deed signed acknowledges that some 47,000 acres of land in the Waikato region is significant to Waikato-Tainui. In signing the settlement deed, the iwi gifts that land to the Crown so it can continue to be held for conservation, and the benefit of all inhabitants of New Zealand.

The settlement quantum for Waikato-Tainui includes a combination of cash and crown owned land worth \$170 million. This quantum was transferred to the Waikato Raupatu Lands Trust, set up to manage the settlement redress provided by the Crown. In addition to the \$170 million redress, the Deed of Settlement also contains a relativity mechanism provision that enables Waikato-Tainui to claim additional redress if the total value of settlement redress exceeds \$1 billion in 1994 present value dollars. Once triggered, Waikato-Tainui can claim up to 1994 in real terms, 17 percent of the total value of settlement redress until 2044. In 2012, total settlement redress exceeded \$1 billion and the relativity mechanism was triggered.

As part of the settlement, Waikato-Tainui also received a right of first refusal over certain Crown owned properties. The financial and commercial redress payment was to compensate Waikato-Tainui for economic loss arising from Crown breaches of its obligations under the Treaty of Waitangi and to give Waikato-Tainui the means to enhance the economic and social position of its members.

The value of assets held by the Waikato Raupatu Lands Trust was \$925 million in the year ended 31 March 2013. The majority of the assets are held by the trust's subsidiary company Tainui Group Holdings Limited (TGHL). TGHL interests are primarily in property investment (83 percent), hotels (11 percent), fishing (five percent) and general investment (three percent). The Waikato Raupatu Lands Trust focuses on providing services (education, health, wellbeing support) to its members.

An example of the type of property development undertaken by TGHL is provided by the former Te Rapa Air Force Base, one of the commercial pieces of land transferred to Waikato-Tainui as part of the settlement redress. TGHL has since developed the air base into: 'The Base', New Zealand's largest shopping complex worth more than \$250 million.

Waikato-Tainui Raupatu – River (assets managed by the Waikato Tainui Raupatu Lands Trust)

The Crown and Waikato-Tainui signed a Deed of Settlement on 17 December 2009. As part of the settlement the Crown committed to enter into a new era of co-management over the Waikato River with Waikato-Tainui and recognised the significance of the Waikato River to Waikato-Tainui.

The Crown also agreed to provide financial redress as part of the settlement in three ways. The Crown agreed to:

²⁴ Waikato-Tainui Relativity Report (April 2013) [http://www.waikatotainui.com/i/files/2013-04RelativityReport%20\(2\).pdf](http://www.waikatotainui.com/i/files/2013-04RelativityReport%20(2).pdf)

²⁵ At the time of preparing this report Waikato-Tainui are engaged in arbitration proceedings with the Crown regarding relativity payments. The \$70 million to Waikato-Tainui is undisputed. The arbitration concerns the contest that there is still an amount owed by the Crown to the claimants under the mechanism formula. Parties are awaiting the outcome from the Arbitrator, Sir Andrew Tipping.

²⁶ As the Ngāti Hauā settlement occurred after 2012, the financial redress of \$13 million is not included in the collectively owned assets base of Māori in the Waikato region.



- make a contribution of \$20 million to the Waikato Endowed College Trust
- provide \$50 million as a fund for initiatives to restore and protect the relationship of Waikato-Tainui with the Waikato River as well as the protection of relevant areas and species
- provide \$1 million per year for 30 years to fund the Waikato-Tainui participation in the co-governance processes of the settlement.

Central North Island Forests Iwi Collective - Tūwharetoa (assets managed by Tūwharetoa Settlement Trust)

The Crown and the Central North Island Forest (CNI) Iwi Collective signed a deed of settlement on 25 June 2008. Under the settlement, the Collective, representing Ngāi Tūhoe, Ngāti Tūwharetoa, Ngāti Whakaeu, Ngāti Whare, Ngāti Manawa, Ngāti Rangitīhi, Raukawa, and the affiliate Te Arawa iwi and hapū. The value of the Crown land transferred to the Collective was \$196 million. The Collective will also receive the rentals that have accumulated on the land since 1989, which are worth approximately \$223 million, and its share of the annual income stream of about \$15 million.

As part of the CNI Forests Collective Settlement, Ngāti Tūwharetoa received²⁷:

- 25.9% of the accumulated rentals from the CNI Forests Land
- 25.9% of the annual Crown Forest License fees (\$2m-\$3m per annum)
- a share of three million NZUs (carbon credits)
- preferential rights to buy certain Crown Assets
- a share of 176,000 hectares of Central North Island forests.

Ngāti Raukawa (assets managed by the Ngāti Raukawa Settlement Trust)

The Crown and Ngāti Raukawa signed a Deed of Settlement on 2 June 2012. The Ngāti Raukawa settlement includes commercial redress totalling \$50 million including the value of the 2008 Central North Island Forestry Settlement. The Crown gave Ngāti Raukawa \$21 million while the remaining \$29 million was deducted from the Central North Island Iwi Holdings account. The Ngāti Raukawa settlement also returns culturally significant sites along the Waikato River and other areas, as well as strengthening the commercial relationship, between Ngāti Raukawa and Mighty River Power.

Post settlement, the Ngāti Raukawa Settlement Trust is preparing for direct investments in a number of areas including dairy, forestry and property.

Pouakani (assets managed by the Te Pūtahitanga o Ngā Ara Trust)

The Crown and Pouakani signed a Deed of Settlement on 19 November 1999. The settlement quantum was \$2.7 million, plus the right to purchase an area of up to 1679 hectares of Pureora Central Forest, a Crown-owned exotic pine forest. The option to purchase this land was taken in 2002.

The asset base of Pouakani, held and managed by Te Pūtahitanga o Ngā Ara Trust, has now grown to \$29 million. Since settlement, a concerted effort has been made to develop and grow the

²⁷ Tūwharetoa Settlement Trust – The Settlement, <http://tst.Māori.nz/about/the-settlement/>

assets of the Trust to build an economic base that will provide increasing financial support and assistance to the Trust members. This has included setting up the Awhina tourism experience and entering a partnership with Titiraupenga Trust in 2003 to purchase 435.27 hectares of dairy and dry stock land adjoining the Titiraupenga Trust farmland.

Maraeroa A and B Trust (assets managed by the Maraeroa A and B Trust)

The Crown and the descendants of the original owners of the Maraeroa A and B Blocks signed a deed of settlement on 12 March 2011. The total settlement quantum transferred to the Maraeroa A and B Trust from the Crown was \$1.8 million. This consisted of a payment of \$1.6 million commercial redress and property transferred worth \$222,000.

Ngāti Korokī Kahukura (assets managed by the Taumatawiwi Trust)

The raupatu claims of Ngāti Korokī Kahukura were settled through the 1995 Waikato-Tainui land settlement. This settlement addresses the claims of the whole of Ngāti Korokī Kahukura not settled by the earlier settlement. Ngāti Korokī Kahukura received a settlement quantum of \$3 million and the exclusive right of first refusal over all Crown-owned properties located within a specified area for 172 years from settlement date.

Ngāti Hauā (assets managed by the Ngāti Hauā Iwi Trust)

The Crown and Ngāti Hauā signed a deed of settlement on 18 July 2013. This was the final settlement of all historical Treaty of Waitangi claims of Ngāti Hauā resulting from acts or omissions by the Crown prior to 21 September 1992. As part of this settlement, Ngāti Hauā received \$13 million of financial redress in 2013, and the return of culturally significant sites, such as the mountain Maungakawa, located within Te Tapui Scenic Reserve. As part of the settlement, Ngāti Hauā have the exclusive right of first refusal over 10 Ministry of Education properties, three New Zealand Police properties, one Waikato District Health Board property and one Department of Conservation property for a period of 173 years from settlement date.

FUTURE POTENTIAL TREATY OF WAITANGI SETTLEMENT ASSETS IN THE WAIKATO REGION

There are currently three pending Treaty of Waitangi settlements in the Waikato region. Ngāti Tamaoho and the Hauraki collective are currently engaged in detailed negotiations with the Crown²⁸. Ngāti Te Ata is in negotiations with the Crown towards signing an Agreement in Principle to proceed with their claim.

In addition to the three pending claims in the Waikato region, the Ngāti Maniapoto Māori Trust Board has also started discussions with the Crown, regarding the comprehensive settlement of the Ngāti Maniapoto Treaty of Waitangi claims.

MĀORI FISHERIES ACT 2004 SETTLEMENT ASSETS IN THE WAIKATO REGION

The Māori Fisheries Act 2004 came into force in September 2004. The Act implements the agreements reached by the deed of settlement in September 2002 and provides for the development of the interests of iwi in fisheries, fishing and fishing related activities. The Act does this via a framework for the allocation and management of settlement assets. Some of the settlement assets are allocated and transferred to iwi while others are managed by Te Ohu Kaimoana.

28 In November 2013 The Crown advanced the Hauraki collective \$53 million to enable them to buy the Pouarua Dairy Complex farms as part of a Treaty of Waitangi settlement. The farms have about 5000 cows over 2200 hectares near Ngatea.



Each iwi receives a minimum asset package of \$1 million. Iwi receive a mixture of quota; income shares in Aotearoa Fisheries Limited; and cash. The allocation is based on the length of the coastline, and the size of the population, relative to the total Māori population as per the Māori Fisheries Act 2004.²⁹

The key, but not sole, requirement for receiving fisheries settlement assets is the recognition of a representative iwi organisation as a mandated iwi organisation (MIO)³⁰. Mandated iwi in the Waikato region are: Waikato, Maniapoto, Hauraki and Ngāti Raukawa. Table 4.5 shows the allocation of fishery assets by mandated iwi organisation in the Waikato region.

Table 4.5: Allocated fishery assets in the Waikato region, value 2012, (\$m)

Iwi	Mandated Iwi organisation	Allocated assets (\$m)
Waikato	Tainui Group Holdings Limited	33.0
Ngati Tuwharetoa	Ngati Tuwharetoa Fisheries Holdings Limited	18.8
Maniapoto	Maniapoto Maori Trust Board	11.8
Hauraki	Iwi of Hauraki	7.9
Raukawa	Raukawa Fisheries Limited	5.3
Total		76.8

Source: Te Ohu Kai Moana, Annual reports

The value of fishery assets held by MIOs in the Waikato region in 2012 was near \$77 million. Tainui Group Holdings Limited (TGHL) accounted for 43 percent of this figure. TGHL's quota investment of \$20 million provides an annual return of 7.3 percent to the group. TGHL has also established an asset holding company alliance with Ngāti Raukawa and Ngāti Maniapoto, to lease out the aggregated quota, held by the three iwi.

CAVEATS TO THIS ASSESSMENT

Our assessment of the identified Māori land incorporation blocks and ahu whenua trusts draws on asset values, and activities that are known. Values of trusts and incorporations, where assets are not known, have been imputed using a series of ratios (see Section 9 for more information). As a result, the information highlighted in this report, is largely from well known, prosperous businesses. Information on these incorporations and ahu whenua trusts is readily available, again, indicating their business standing and success in operating in the area under study. Other incorporations and ahu whenua trusts that are operating in farm and forestry ventures, are likely to be of a lower value, as they are less well known and the information is not as readily available.

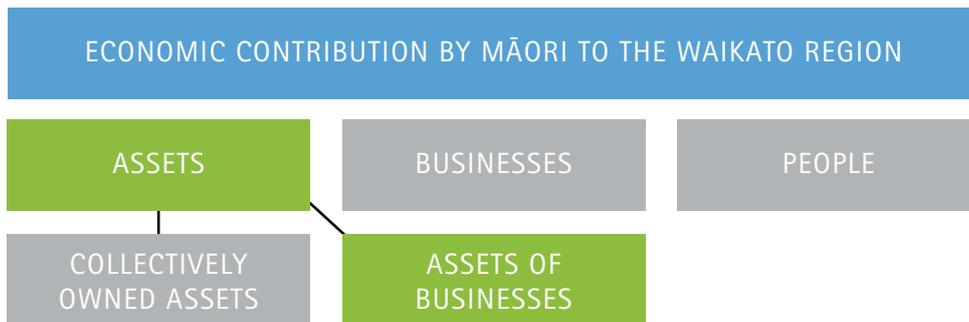
It is not known how much of the quantum of the total land in the Waikato region is marginal land or the productive uses of the remaining blocks identified in the annual report review and interviews. While able to give an indication of the total amount of land held by Māori land incorporations and ahu whenua trusts; the total number of Māori land incorporations and ahu whenua trusts in the region; and the average number of hectares per incorporation or trust; detailed information on whether this land is productive or marginal, is not provided.

²⁹ For further information see Te Ohu Kaimoana <http://teohu.Maori.nz>

³⁰ When a recognised iwi organisation has met the governance criteria set out in the Māori Fisheries Act it is entitled to receive fisheries assets as the mandated iwi organisation for that iwi. There can be only one mandated iwi organisation per iwi.

5 ASSETS OF MĀORI BUSINESSES

Māori businesses (businesses run by employers and the self-employed) contribute \$3.3 billion (54 percent) to the overall Māori asset base of the Waikato region.



This section outlines the contribution of businesses run by Māori employers³¹ (with employees) and self-employed (without employees) Māori³² make to the overall Māori asset base of the Waikato region.

5.1 MĀORI BUSINESSES CONTRIBUTION TO WAIKATO ASSET BASE

Assets of Māori businesses contributed an estimated \$3.3 billion to the asset base of the Waikato economy in 2012. Assets of Māori businesses owned by Māori (employers with employees) accounted for \$2.6 billion or 80 percent of the overall contribution of businesses to the Māori asset base in the Waikato region. Māori entrepreneurial assets, the assets of self-employed (without employees), contributed the remaining \$668 million or 20 percent.

The majority of the assets in Māori businesses in the Waikato region are in the agriculture, forestry and fishing (23 percent) and property & business services (20 percent) industries. Table 5.1 provides a breakdown of Māori businesses in the Waikato region.

Table 5.1: Māori employer and self-employed enterprises: Waikato, 2012,

Industry	Self-employed Number	% of Total	Employers Number	% of Total	Total
Agriculture, Forestry and Fishing	218	64%	125	36%	343
Mining	-	-	-	-	-
Manufacturing	89	63%	54	37%	143
Electricity, Gas and Water Supply	-	-	-	-	-
Construction	223	59%	156	41%	379
Wholesale Trade	46	64%	25	36%	72
Retail Trade	112	57%	84	43%	196
Accommodation, Cafes and Restaurants	38	44%	48	56%	86
Transport and Storage	54	62%	33	38%	87
Communication Services	38	83%	8	17%	46
Finance and Insurance	13	65%	7	35%	21
Property and Business Services	215	71%	89	29%	304
Government Administration and Defence	-	-	-	-	-
Education	54	78%	15	22%	69
Health and Community Services	71	74%	25	26%	96
Cultural and Recreational Services	60	82%	13	18%	73
Personal and Other Services	79	70%	33	30%	112
Not Elsewhere Included	120	77%	36	23%	156
Total All Industries	1431	66%	750	34%	2182

Source: BERL

³¹ People who are employers that identify their ethnicity as Māori.

³² People who are self-employed that identify their ethnicity as Māori.



5.2 MĀORI BUSINESS ASSETS OWNED BY EMPLOYERS

This section focuses on the assets of people who identified themselves as an employer (with employees) identifies themselves as being of Māori ethnicity.

Our estimates indicate that there were 750 businesses that were operated by Māori employers (with employees) in the Waikato region in 2012. The asset value of these businesses equates to \$2.6 billion, or 80 percent of all assets held by Māori businesses (i.e., assets owned by employers and self-employed) in the Waikato region.

Table 5.2 provides an overview of the number of Māori employers (with employees) in the Waikato region by industry and the corresponding estimated asset value of these businesses.

Table 5.2: Māori employer (with employees) count and the asset value of these businesses by industry for the Waikato region, 2012 (\$m)

Employers by Industry	Employers Count	% of Total	Employer Assets (\$m)	% of Total
Agriculture, Forestry and Fishing	125	17%	517	20%
Mining	0	0%	0	0%
Manufacturing	54	7%	320	12%
Electricity, Gas and Water Supply	0	0%	0	0%
Construction	156	21%	124	5%
Wholesale Trade	25	3%	110	4%
Retail Trade	84	11%	153	6%
Accommodation, Cafes and Restaurants	48	6%	37	1%
Transport and Storage	33	4%	206	8%
Communication Services	8	1%	139	5%
Finance and Insurance	7	1%	165	6%
Property and Business Services	89	12%	503	19%
Government Administration and Defence	0	0%	0	0%
Education	15	2%	146	6%
Health and Community Services	25	3%	45	2%
Cultural and Recreational Services	13	2%	98	4%
Personal and Other Services	33	4%	0	0%
Not Elsewhere Included	36	5%	85	3%
Total All Industries	750	100%	2,649	100%

Source: BERL

Māori employers in the Waikato region in 2012 were concentrated in the construction (21 percent of all employers), agriculture, forestry & fishing (17 percent), property & business services (12 percent) and retail trade (11 percent) industries.

The largest industries with assets held by Māori in the Waikato region in 2012 were agriculture, forestry and fishing (20 percent of Māori businesses in the Waikato region); property & business services (19 percent); and manufacturing (12 percent).

The number of employers in an industry is not necessarily correlated to the value of assets held in that industry. For example, despite making up 21 percent of all Māori employers in the Waikato region, the value of assets owned by businesses run by Māori in the construction industry made up five percent of all Māori employer assets in 2012.

Similarly, Māori employers in property & business services businesses in the region made up 12 percent of overall employment in the region, but the value of these assets as a percentage of all Māori assets held by employers in businesses in the region was 19 percent.

5.3 MĀORI ENTREPRENEURIAL ASSETS

This section looks at the assets held by Māori who are self-employed (without employees) who identify themselves as being of Māori ethnicity.

Estimates are there were over 1,400 Māori self-employed (without employees) entrepreneurs in Waikato region in 2012. The asset value of these entrepreneurs is approximately \$668 million or 20 percent of all assets held by Māori businesses (i.e., assets owned by employers and self-employed).

Table 5.3 provides an overview of the number of Māori self-employed in the Waikato region by industry and the corresponding asset value of these entrepreneurial enterprises.

Table 5.3: Māori self-employed (without employees) count and asset value of these enterprises by industry for the Waikato region, 2012 (\$m)

Employers by Industry	Self-employed Count	% of Total	Self-employer Assets (\$m)	% of Total
Agriculture, Forestry and Fishing	218	15%	249	37%
Mining	0	0%	0	0%
Manufacturing	89	6%	32	5%
Electricity, Gas and Water Supply	0	0%	0	0%
Construction	223	16%	39	6%
Wholesale Trade	46	3%	16	2%
Retail Trade	112	8%	24	4%
Accommodation, Cafes and Restaurants	38	3%	3	0%
Transport and Storage	54	4%	27	4%
Communication Services	38	3%	30	4%
Finance and Insurance	13	1%	6	1%
Property and Business Services	215	15%	154	23%
Government Administration and Defence	0	0%	0	0%
Education	54	4%	7	1%
Health and Community Services	71	5%	5	1%
Cultural and Recreational Services	60	4%	41	6%
Personal and Other Services	79	5%	0	0%
Not Elsewhere Included	120	8%	37	5%
Total All Industries	1431	100%	668	100%

Source: BERL

In 2012, almost half of all self-employed Māori in the Waikato region worked in the construction (15 percent); agriculture, forestry & fishing (15 percent); and the property and business services (15 percent) industries.

The assets of entrepreneurs in the agriculture, forestry and fishing, and property and business services industries, made up 60 percent of the total Māori entrepreneurial asset value in the Waikato region.



6 BUSINESSES

In 2012, Māori businesses contributed \$1.4 billion to the GDP of the Waikato region. This represents an 8 percent contribution to the total GDP of the Waikato region (\$17.0 billion).

ECONOMIC CONTRIBUTION BY MĀORI TO THE WAIKATO REGION

ASSETS

BUSINESSES

PEOPLE

It is estimated the Māori businesses generated more than \$10.6 billion in value added³³ in the New Zealand economy in 2012. Māori contribution to New Zealand's economy has steadily increased over the past two decades.

This section looks at the contribution of the Māori economy in Waikato region in terms of value added GDP. This is done by examining:

- key industries for Waikato Māori;
- the contribution of Māori GDP to overall GDP in the Waikato region;
- the contribution by Māori to GDP by district in the Waikato region; and
- the contribution of Waikato Māori GDP to New Zealand Māori GDP.

6.1 KEY INDUSTRIES FOR WAIKATO MĀORI

At \$1.4 billion, Waikato Māori businesses accounted for just over 13 percent of total Māori value added GDP, in 2012. Māori enterprises that made a strong contribution to overall Māori value added in the Waikato region in 2012 were in the health and community services (19 percent of overall Māori GDP in the Waikato region); property and business services (16 percent); manufacturing (11 percent); and agriculture industries (nine percent).

Table 6.1 shows GDP by Māori businesses in the Waikato region, in relation to total GDP by Māori businesses in New Zealand, by industry.

³³ GDP is calculated via the production account through the value added of individual industries or businesses/enterprises.

Table 6.1: Share of Māori value-added³⁴ in the Waikato region, 2012 (\$m)

Waikato value added by industry, \$m	Waikato	New Zealand	% share of Waikato to NZ Māori GDP
Agriculture	120	757	16%
Forestry	82	577	14%
Fishing	5	88	5%
Mining	1	2	36%
Manufacturing	150	1031	15%
Elect, gas & water	8	43	20%
Construction	79	568	14%
Wholesale trade	30	282	10%
Retail trade	56	427	13%
Accommodation	28	187	15%
Transport	57	568	10%
Communications	59	527	11%
Finance services	32	413	8%
Property and business services	214	1810	12%
Education	109	759	14%
Health and Community Services	266	1892	14%
Cultural and Recreational Services	33	306	11%
Personal and Other Services	50	412	12%
Total Māori GDP	1377	10649	13%

Note: Excludes gov't administration and defence

Source: BERL

6.2 CONTRIBUTION OF MĀORI GDP TO OVERALL GDP IN THE WAIKATO

In 2012, Māori businesses contributed \$1.4 billion to the GDP of the Waikato region. This represents an 8 percent contribution to the total GDP of the Waikato region.

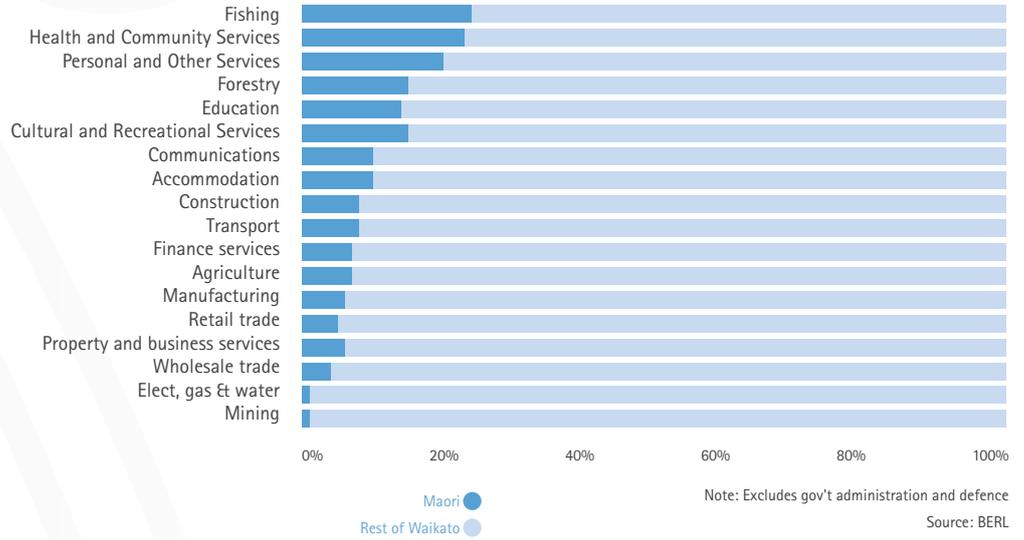
The fishing industry in the Waikato region is relatively small compared to other industries in the region. In 2012, the Māori fishing industry in the region, contributed approximately \$5 million. This represents 39 percent of the overall GDP from the fishing industry in the Waikato region.

Other industries where Māori businesses make significant contributions to the GDP of the Waikato region are health and community services (23 percent of GDP in this industry); personal and other services (19 percent); forestry (17 percent); education (16 percent); and cultural and recreational services (15 percent). Figure 6.1 illustrates Māori share of GDP by industry in the Waikato region in 2012.

³⁴ Value-added (or GDP) is a measure of output of final goods & services produced in an economy in a given year/period.



Figure 6.1: Māori GDP share of industry in the Waikato region, 2012
 Waikato value added by industry (2012 \$m)



6.3 CONTRIBUTION BY MĀORI TO GDP BY DISTRICT IN THE WAIKATO

In 2012, Māori businesses in Hamilton city contributed 34 percent of the overall GDP of the Waikato region. . Figure 6.2 below presents the contribution of Māori to GDP by district.

Figure 6.2: Distribution of Māori GDP by district in the Waikato region, 2012

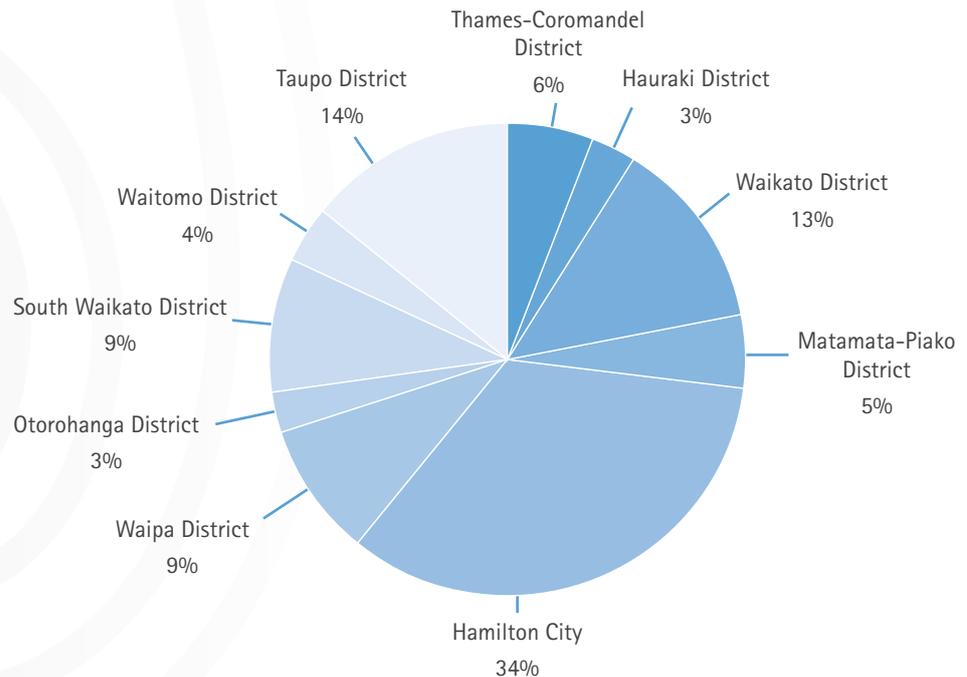
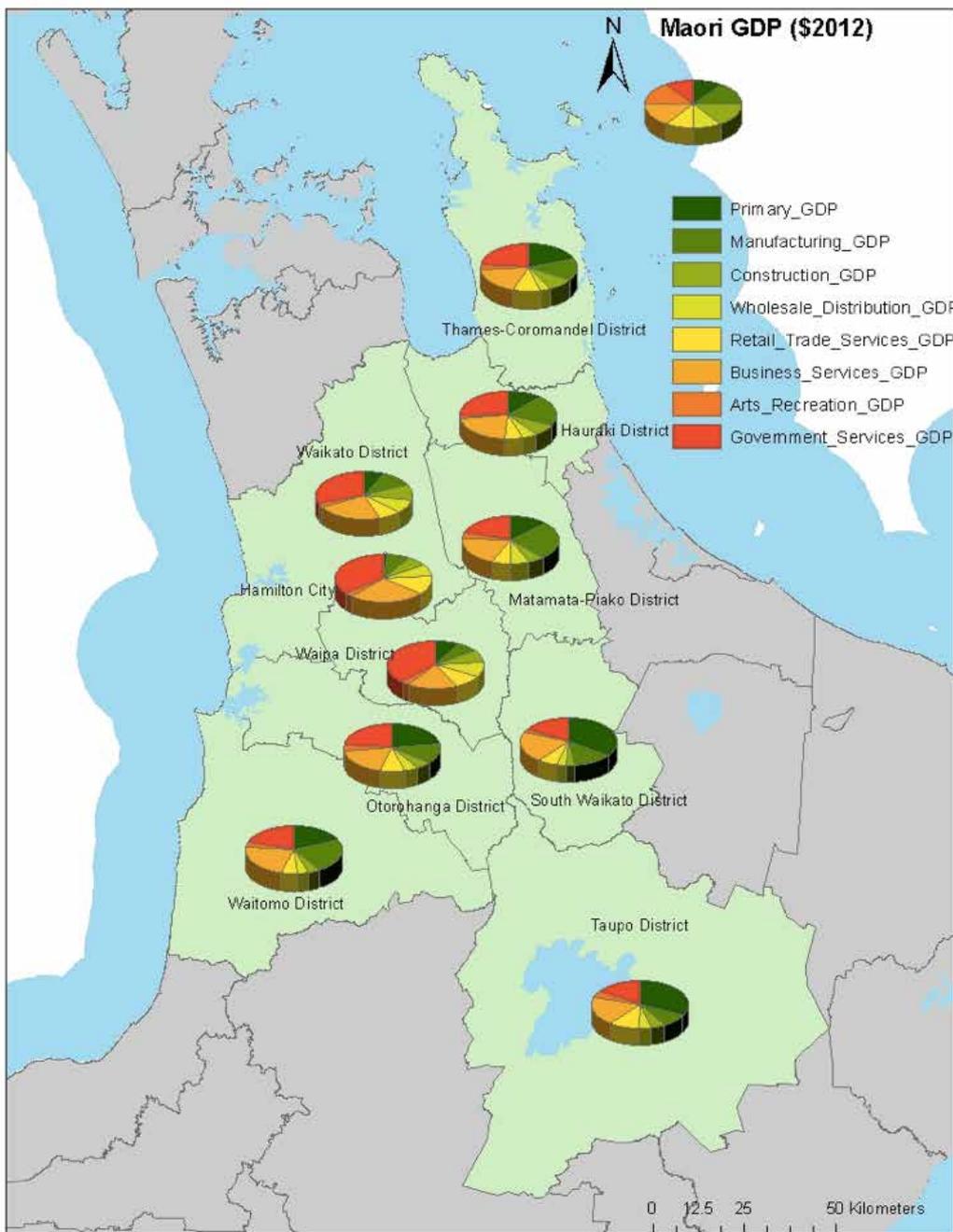


Figure 6.3 shows Māori value added for the districts in the Waikato region by industry.

Figure 6.3: Māori value added for the districts in the Waikato region by industry, 2012



Source: BERL

Māori in Hamilton city are the largest contributors to the Waikato region Māori economy. In 2012, Māori businesses in Hamilton city contributed \$472 million (34 percent) to the total Māori GDP of the Waikato region. This contribution came largely from activities in the health & community services (\$115 million); property & business services (\$92 million); manufacturing (\$45 million); and



education (\$44 million) industries. In 2012, these industries made up just over 60 percent of the total Māori GDP in Hamilton city, and 21 percent of overall Māori GDP in the Waikato region.

In 2012, Māori businesses in the Taupō district were the second biggest contributor to the Māori economy within the Waikato region, contributing \$192 million (14 percent) to total Māori GDP. This contribution came largely from activities in forestry (\$40 million); health and community services (\$23 million); and agriculture (\$20 million).

The Waikato district made up 13 percent of the Māori economy in the Waikato region in 2012. This contribution was largely from health and community services (\$35 million) and property and business services (\$35 million).

The contribution of Māori to the economy in South Waikato district (\$127 million); Waipā district (\$20 million); Thames-Coromandel district (\$79 million); Matamata-Piako district (\$65 million); Waitomo district (\$61 million); Hauraki district (\$49 million); and Ōtorohanga district (\$39 million); largely reflected those of the Waikato region.

Noticeable industry GDP variations within the districts of the Waikato in 2012 include:

- the high contribution of the Māori agriculture industry to the overall Māori economy in eight of the 10 districts. The contribution of the Māori agriculture industry to the economy of the Ōtorohanga district was the largest (26 percent of the Māori economy in Ōtorohanga district); and smallest in Hamilton city (2 percent)
- the high contribution of Māori forestry industry to Māori economy in the South Waikato district (23 percent of Māori economy in the South Waikato district); and in the Taupo district (22 percent)
- the high contribution of Māori manufacturing industry to Māori economy in the Matamata-Piako district (20 percent contribution to the district's economy); Waitomo district (18 percent); and Hauraki district (16 percent)
- the high contribution of Māori health & community services industry to Māori economy in the Waipa district (27% percent contribution Māori economy in the Waipa district).

Table 6.2: Māori value added for the districts in the Waikato region by industry, 2012 (\$m)

Māori value added by industry, \$m	Thames-Coromandel District	Hauraki District	Waikato District	Matamata-Piako District	Hamilton City	Waipa District	Otorohanga District	South Waikato District	Waitomo District	Taupo District	Waikato Region
Agriculture	6	8	17	11	9	14	10	15	10	20	120
Forestry	8	0	0	0	0	0	0	29	3	42	82
Fishing	4	0	0	0	0	0	0	0	0	1	5
Mining	0	0	0	0	0	0	0	0	0	0	1
Manufacturing	9	8	19	13	45	8	4	18	11	16	150
Electricity, Gas and Water Supply	0	0	2	0	2	1	0	1	0	1	8
Construction	6	3	12	3	28	7	2	4	3	10	79
Wholesale Trade	2	1	5	1	14	3	1	1	1	2	30
Retail Trade	5	2	5	3	20	4	2	5	2	7	56
Accommodation, Cafes and Restaurants	3	1	3	1	9	1	1	2	2	7	28
Transport and Storage	2	2	8	4	18	6	2	5	2	8	57
Communication services	2	3	6	1	33	5	1	2	2	5	59
Finance services	1	1	4	2	15	3	0	2	1	3	32
Property services	9	6	33	8	92	17	5	15	9	19	214
Education	5	3	16	4	44	10	2	9	4	12	109
Health & Comm'y Services	14	9	35	10	115	32	6	14	9	23	266
Cultural & Rec Services	2	0	3	2	13	3	1	2	1	6	33
Personal & Other Services	3	1	6	2	18	5	2	4	1	10	50
Total	79	49	173	65	472	120	39	127	61	192	1377

Note: Excludes gov't administration and defence

Source: BERL

6.4 CONTRIBUTION OF WAIKATO MĀORI GDP TO NEW ZEALAND MĀORI GDP

Māori GDP in the Waikato region in relation to total Māori GDP is relatively high in mining (36 percent); electricity, gas and water (20 percent); agriculture (16 percent); manufacturing (15 percent), and accommodation (15 percent).



7 PEOPLE

Average and median weekly income for Māori in the Waikato region is similar to that of Māori nationally. However, compared to non-Māori in the Waikato region, Māori average weekly income is \$189 (25 percent) less per week and median weekly income is \$105 (18 percent) less per week.³⁵

Like their counterparts nationally, Māori households spend more than they earn.

ECONOMIC CONTRIBUTION BY MĀORI TO THE WAIKATO REGION

ASSETS

BUSINESSES

PEOPLE

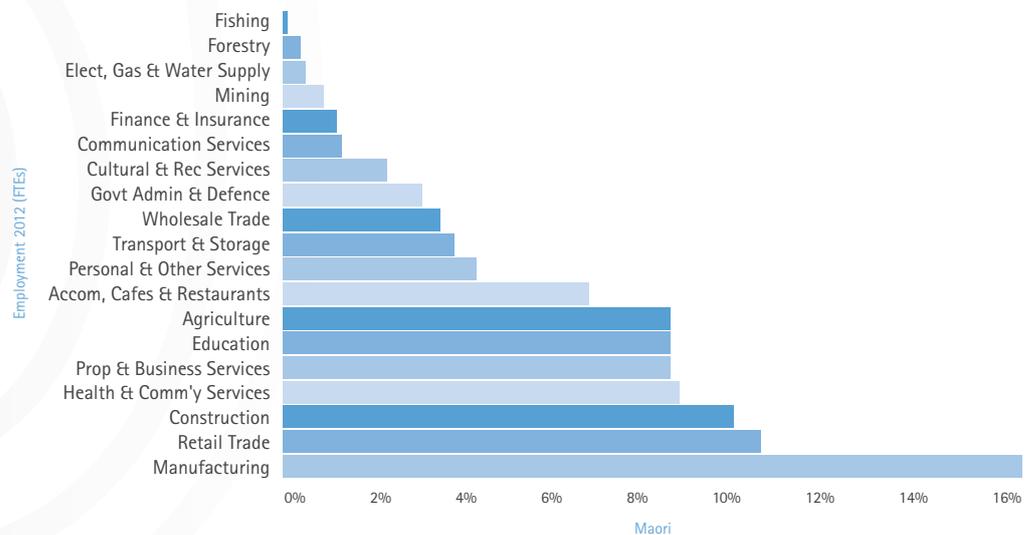
This section describes Māori in terms of employment in the Waikato region. It describes the industries that employ Māori, provides information on income earned by Māori and takes a look at Māori household income and expenditure.

7.1 MĀORI EMPLOYMENT BY INDUSTRY IN THE WAIKATO REGION

In 2012, Māori made up 25 percent of total people employed in the Waikato region, with just over 42,100 Māori employed across a number of industries.

The manufacturing, retail trade, construction, health & community services, property and business services, agriculture and education industries account for just over 70 percent of Māori employment in the Waikato region. Many of these industries offer lower earning potential and relatively fewer skilled occupation opportunities. The overall distribution of Māori employment in the Waikato region by industry is illustrated in Figure 7.1.

Figure 7.1: Distribution of Māori employment by industry in the Waikato region, 2012



³⁵ Income received before tax from all sources, such as wages, salary, self-employment, government transfers, private superannuation and pension schemes, annuities and investment income. Average weekly income is the total of weekly income for the working-age population, divided by the working-age population. Median weekly income is the middle point of the distribution of weekly income. For example, if there were 99 people, the median weekly income would be the weekly income of the fiftieth person when people are ranked by weekly income.

7.2 MĀORI EMPLOYMENT BY DISTRICT IN THE WAIKATO REGION

In 2012, 34 percent of all Māori employment in the Waikato region was in Hamilton city. A further 26 percent of employment in the Waikato region was in Waikato and Taupo districts, each with 5,500 people employed.

Table 7.1 summarises Māori employment by district in the Waikato region.

Table 7.1: Māori employment by district and industry (Waikato region), 2012

Māori employment 2012 (FTEs)	Thames-Coromandel District	Hauraki District	Waikato District	Matamata-Piako District	Hamilton City	Waipa District	Otorohanga District	South Waikato District	Waitomo District	Taupo District	Waikato Region
Agriculture	173	231	507	340	265	420	308	467	319	612	3641
Forestry	16	0	1	0	0	1	0	57	5	84	164
Fishing	28	1	0	0	0	0	0	0	0	6	36
Mining	10	34	127	15	54	10	10	5	88	44	394
Manufacturing	405	362	859	584	2066	386	179	845	507	724	6917
Elect, Gas & Water Supply	10	10	47	0	58	16	5	16	10	26	199
Construction	327	171	634	185	1506	390	93	234	141	541	4222
Wholesale Trade	94	35	243	65	690	129	30	45	35	119	1485
Retail Trade	386	179	430	241	1584	357	169	372	184	579	4481
Accom, Cafes & Restaurants	267	62	257	76	886	152	81	171	171	757	2881
Transport & Storage	55	55	232	121	499	161	45	126	65	227	1587
Communication Services	20	25	54	10	315	44	10	20	15	49	561
Finance & Insurance	20	20	61	25	233	46	5	25	20	46	501
Prop & Business Services	160	102	562	140	1564	295	87	262	145	324	3642
Govt Admin & Defence	38	43	172	53	704	105	14	53	34	96	1313
Education	155	102	538	131	1444	315	82	305	141	392	3605
Health & Comm'y Services	191	129	482	139	1600	454	91	191	119	315	3711
Cultural & Rec Services	54	15	83	49	370	83	34	63	44	166	960
Personal & Other Services	95	52	214	57	636	185	57	128	33	347	1805
Total	2505	1627	5502	2231	14474	3550	1300	3384	2077	5455	42105

Hamilton city employs a significant proportion of the Māori population in the Waikato. The largest share of Māori employment in Hamilton is in manufacturing (14 percent); followed by health and community services; retail trade; and property and business services (11 percent each; and construction and education (10 percent each).

This differs from the rest of the Waikato region where there are considerably lower proportions of Māori employed in health and community services; property and business services; and education. Another notable difference, is that only two percent of Māori employment in Hamilton is in agriculture, compared to 12 percent in the rest of the Waikato region.

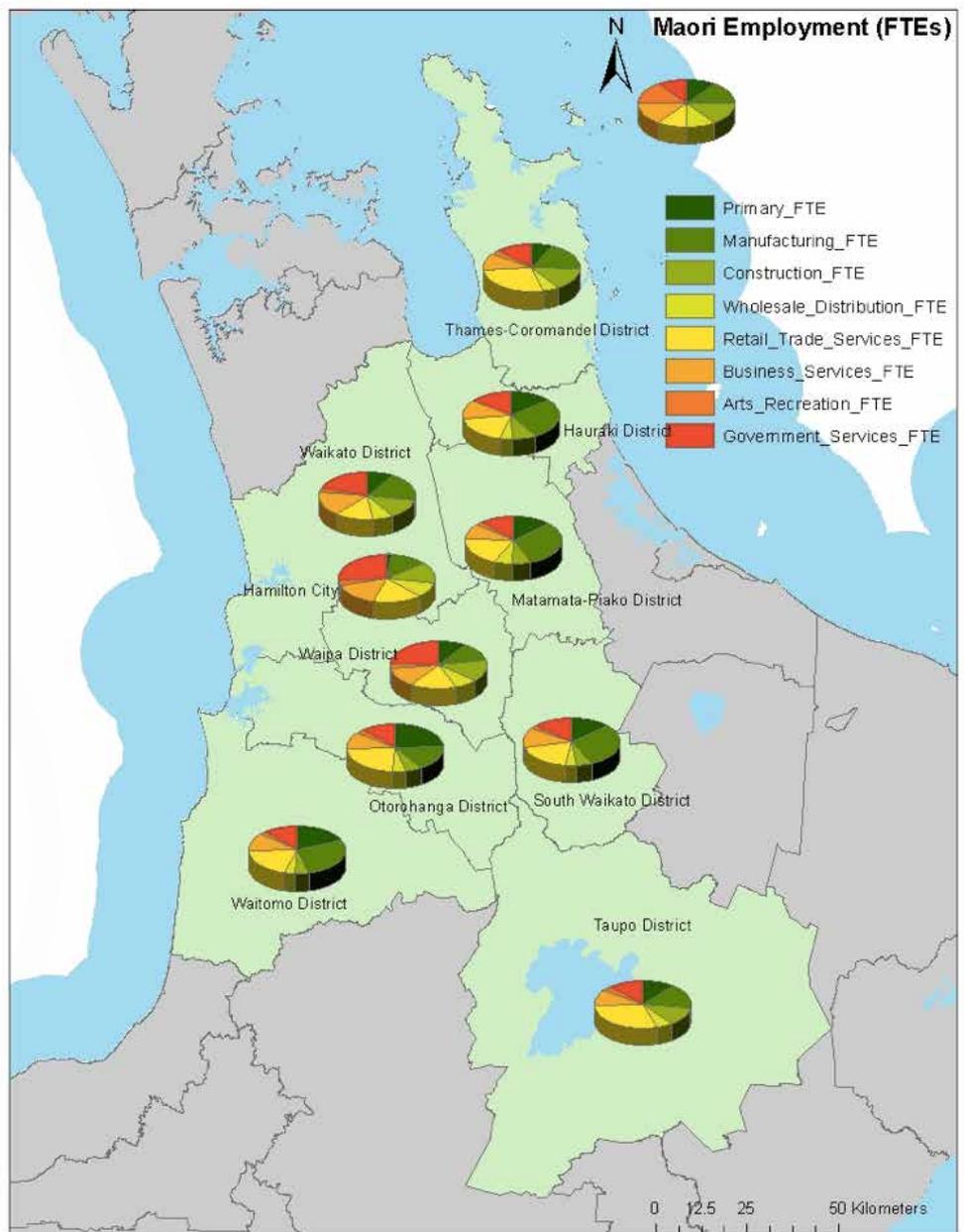
Most other districts have a broadly similar distribution of Māori employment by industry, with the largest share of Māori employment being in manufacturing, followed by agriculture and either construction or retail. The notable exceptions to this are:



- the Otorohanga district where employment is dominated by agriculture with 24 percent of Māori employment in the industry
- the Taupo district where the largest share of Māori employment is in accommodation, cafes and restaurants (14 percent)
- the Waipa district where health & community services made up the largest share of Māori employment (13 percent).

Figure 7.2 summarises Māori employment for the districts in the Waikato region by industry.

Figure 7.2: Māori employment for the districts in the Waikato region by industry



Source: BERL

7.3 INDIVIDUAL INCOME

Average and median weekly income for Māori in the Waikato region is similar to that of Māori nationally. However, compared to non-Māori in the Waikato region, Māori average weekly income is \$189 (25 percent) per week less and median weekly income is \$105 (18 percent) less per week.

The national Māori average weekly income in 2012 was \$582. This was 27 percent (\$160) lower than the 2012 average weekly income for non-Māori.

In 2012, the Māori average weekly income in the Waikato region was \$575. This was \$7 less than the Māori average weekly income in New Zealand (\$582). And 25 percent (\$189) less than the non-Māori average weekly income (\$764) in the Waikato region.

Nationally, average weekly income for Māori in 2012 was 22 percent lower than that for non-Māori.

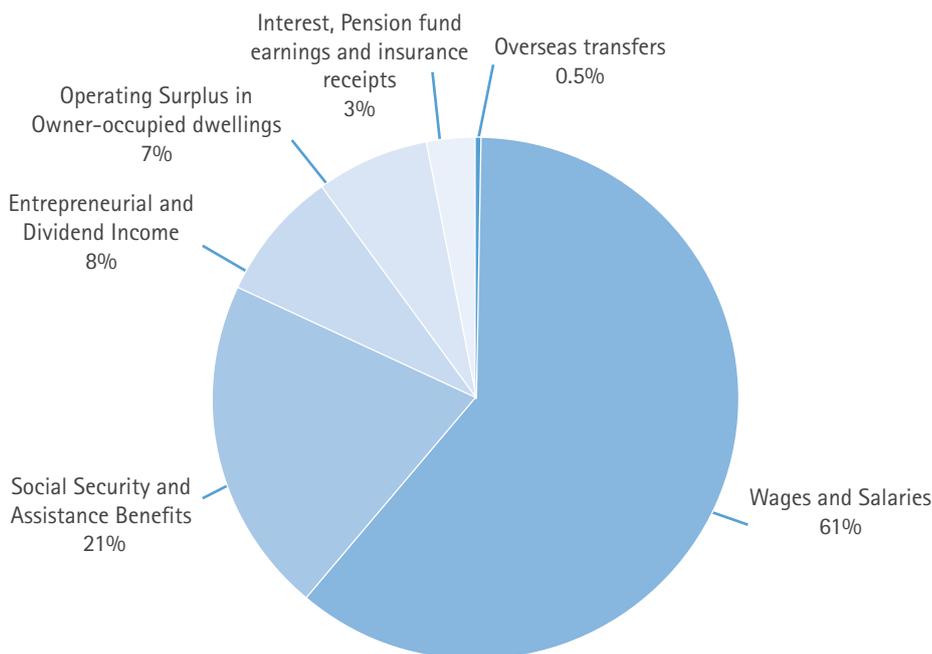
In 2012, Māori median weekly income in the Waikato region was \$463, \$12 lower than national Māori median weekly income. Māori weekly income was 18 percent (\$105) lower than non-Māori weekly income in the Waikato region.

7.4 MĀORI HOUSEHOLD INCOME AND EXPENDITURE

Māori household income

The majority of Māori household income³⁶ in the Waikato region is from paid employment. Figure 7.3 provides a breakdown of household income for the Waikato region by source.

Figure 7.3: Māori household income for the Waikato Region



³⁶ Income includes wages, salary, self-employment, government transfers, private superannuation and pension schemes, annuities and investment income



At 61 percent, wages and salaries make up the largest slice of the Māori household income while entrepreneurial income made up 8 percent of Māori household income in the region.

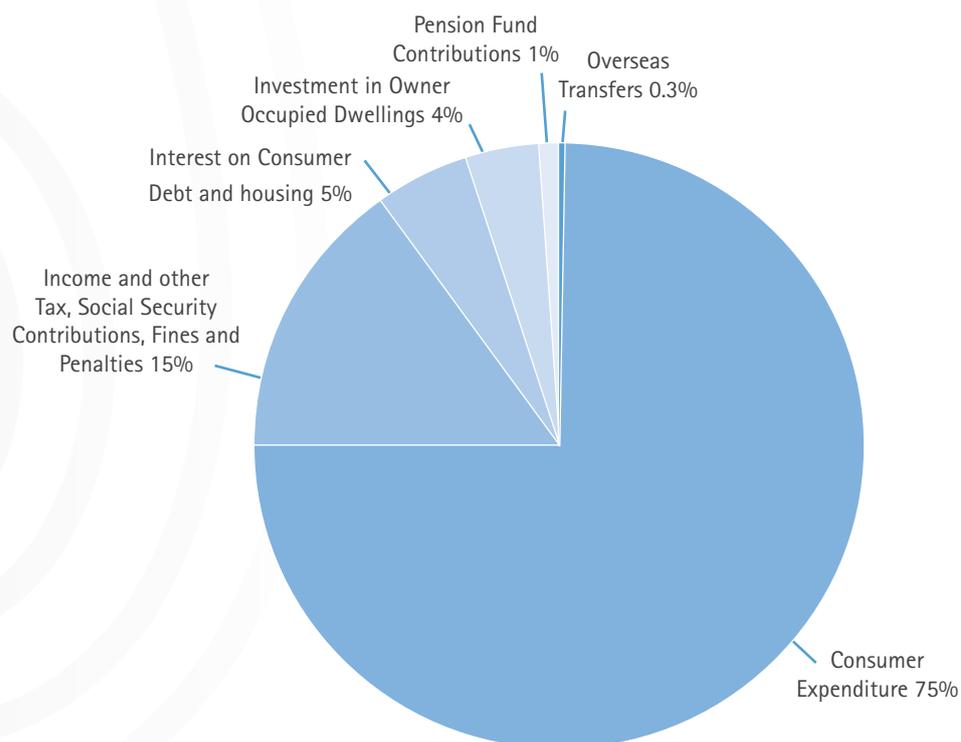
The second major source of income for Māori households in the Waikato region was social security and assistance benefits. The Government contributed 21 percent to Māori household income, the same percentage it contributes to Māori households nationally. In December 2012, 15,941 working-age Māori were recipients of a main benefit (44.5 percent of the total working aged recipients in the Waikato region); 2,610 of who were receiving unemployment benefits (51.4 percent of the total unemployment benefit in the region).

Māori are a youthful population group. In the 2013 Census the median age of Māori nationally (half are older, and half are younger, than this age) was 23.9 years. This compares with 22.7 years in 2006.

Māori household expenditure

Māori households in the Waikato region spend the majority of their income on consumer goods and services. Of total Māori household expenditure in the Waikato region, 75 percent of the total expenditure was on consumer goods and services, including durable goods. The second biggest outlay was income taxes, social security contributions, and fines and penalties, which made up 15 percent of total Māori household spending in the Waikato. Pension fund contributions and overseas transfers make up a minor part of household spend. Figure 7.4 below breaks down household spending in the Waikato region.

Figure 7.4: Māori household outlays for the Waikato region



While the biggest outlays for Māori households nationally are consumer goods and services, income taxes, social security contributions, fines and penalties, the proportion of overall outlays for Māori households in the Waikato region differ in the following ways:

- Māori households in the Waikato region spent less on consumer goods (75 percent versus 78 percent nationally)
- Māori households in the Waikato region had greater outlays on income taxes, social security contributions, fines and penalties (15 percent versus 12 percent nationally).

Māori household savings

Māori households in the Waikato region experience dissavings and spend their income on immediate consumer goods and services at the expense of long term investment opportunities. Table 7.2 shows that in 2010 Māori households in the Waikato region had dissavings of \$326 million.

Table 7.2: Māori household income and outlays in the Waikato region, 2010 (\$m)³⁷

Māori household income and outlays (\$m)	Waikato
Income	% share of Māori Waikato to Maori Total
Wages and salaries	1194
Social security and assistance benefits	418
Entrepreneurial and dividend income	152
Operating surplus in owner-occupied dwellings	132
Interest, pension fund earnings and insurance receipts	54
Overseas transfers	10
Sub-total	1960
Less Outlays	
Consumer expenditure	1707
Income and other tax, social security contributions, fines and penalties	338
Interest on consumer debt and housing	122
Investment in owner-occupied dwellings	91
Pension fund contributions	21
Overseas transfers	6
Sub-total	2286
Net savings	-326

Source: BERL

Dissavings (a savings deficit) by Māori households in the Waikato region are reflective of Māori households nationally. Work undertaken for the Māori Economic Taskforce in 2011 showed that Māori and other (non- Māori) households nationally had net dissavings.

³⁷ Operating Surplus in owner occupied dwellings is the income accruing from ownership of owner-occupied dwellings



8 CONCLUSION

This situational analysis highlights that Māori play a significant role in the Waikato economy through participation in the workforce, contribution to GDP, and ownership of assets.

Māori businesses generated \$1.4 billion in value added in the Waikato region in 2012. . This represents an eight percent contribution to the total GDP of the Waikato region.

Waikato Māori had a strong asset base worth an estimated \$6.2 billion in 2012. This asset base is largely concentrated in the agriculture; forestry and fishing (28 percent of the Māori asset base in the Waikato region); property and business services (23 percent); and manufacturing (15 percent) industries.

A significant proportion of the Waikato Māori asset base is generated by Māori employment through wages and flow-on consumption. This report does however, highlight that Māori employment in the Waikato region is largely concentrated in low paid and low productivity industries, such as manufacturing (16 percent); retail trade (11 percent); and construction (10 percent).

Collectively owned assets held by Māori in the Waikato region make up \$2.9 billion of the total Māori asset base in the region. The collectively owned asset base of the region is expected to grow over the coming years. This will result from further Treaty of Waitangi claim settlements and as Waikato-Tainui receive additional financial redress through the redress mechanism that has been triggered. This additional growth, coupled with ahu whenua trusts, incorporations and treaty settlement entities diversifying operations, seeking additional alternative revenue sources from their land, and joint venture opportunities, mean that Waikato Māori are increasingly likely to play a key part in shaping economic development in the region.

The extent to which the Māori asset base in the Waikato region is likely to grow over the coming years is, therefore, likely to be strongly influenced by the ability of Māori ahu whenua trusts, incorporations, and trusts to diversify their activities; and the ability of Māori to gain a greater share of employment in more skilled and productive industries.

APPENDIX: METHODOLOGY AND DEFINITIONS

MĀORI ASSET BASE

To estimate the Māori Asset base in the Waikato region in 2012, BERL drew on, and updated, the Māori asset base it developed for the Māori Economic Taskforce in 2011. Further detail for each subsection is provided below which highlights where changes or updates were made for this report.

COLLECTIVELY OWNED ASSETS

The asset base of Māori Trusts, Incorporations, Organisations, Boards, PSGEs, and Iwi/Rūnanga holding companies was developed in 2011 to generate estimates of the collectively owned assets held by Māori. The following data sources were used to generate these estimates:

- Annual Reports/ Internal Organisation Reports/ Interviews/ Personal Communications.
 - Activity, asset holdings and income of Māori Trusts, Incorporations, Organisations, Boards, PGSEs, MIOs and Holding Companies.
- Māori Land Court.
 - Size of land holdings and values of Māori Trusts and Incorporations.
- Te Puni Kōkiri (TPK).
 - Main activity, value of assets, income, expenditure and rohe of Top 30 Māori entities.
- Department of Internal Affairs - Charities data
 - Value of assets, income, expenditure, main activity and rohe of registered charitable organisations active in the Māori economy.

By combining the information from these data sources along with information from previous reports and studies, the report was able to identify the 2010 asset value of 418 records. For the 5,488 records of assets that could not be confirmed, their values were imputed using conservative assumptions. The approach taken to impute asset values is outlined fully in BERL's (2011) 'The Asset Base, Income, Expenditure and GDP of the 2010 Māori Economy' report for Māori Economic Taskforce.

Updating the collectively owned asset base for the Waikato region

Since the collectively owned asset base was developed, it has been updated as required on an area-by-area basis, mostly as part of work undertaken for the Bay of Connections. Updating the asset base involved a line by line review of collective assets for the Bay of Connections rohe, using the same data sources used to develop the collective asset base. This provided a 2010 collective asset base that was more reflective of the Bay of Connections rohe and, where appropriate, enabled the activities of entities to be updated or adjusted.



Building on the work undertaken for the Bay of Connections rohe, a similar approach was undertaken to update the collective asset base for the Waikato region. Key differences included:

- Updating, where possible, asset values for the Waikato region with 2012 total asset values. Collective asset values outside of the Waikato region were not updated beyond existing 2010 values.
- Including treaty claim settlements that occurred in the Waikato region after 2010. This information was sourced from the Office of Treaty Settlements. Treaty settlement claims that occurred outside the Waikato region after 2010 were not added to the asset base.

The resulting contribution of the Māori collective asset base in the Waikato relative to the total Māori collective asset base in New Zealand is therefore likely to be larger than is actually the case. We recommend caution when interpreting comparisons between Māori collectively owned asset base in the Waikato region to the total Māori collective asset base.

Assets of Māori businesses (employers and self-employed)

The same approach was used to estimate the asset value of Māori businesses (employers and self-employed) as was undertaken in 'The Asset Base, Income, Expenditure and GDP of the 2010 Māori Economy'. The only difference in the approach used in this report and the approach outlined in 'The Asset Base, Income, Expenditure and GDP of the 2010 Māori Economy' is this report uses 2012 data, rather than 2010 data. This approach was used at the New Zealand and the Waikato regional council area level.

This general method builds from information on the average value of assets per employee, a proxy for the capital-labour ratio, multiplied by the number of employees in these enterprises. This calculation is undertaken at the disaggregated industry level.

An adjustment is made to incorporate the difference in value of assets held in Māori enterprise compared to those in other enterprises. This difference is measured by proxy, using the mean income of Māori employers, compared to the mean income of all employers. Again, this adjustment is undertaken at the disaggregated industry level.

This difference is measured by proxy using the mean income of Māori employers compared to the mean income of all employers; again this adjustment is undertaken at the disaggregated industry level.

Assets in enterprises associated with Māori employers and self-employed Māori can be stated as the number of:

- Māori employers, multiplied by the ratio of employees to employers, multiplied by total assets per employee, multiplied by the ratio of the income of Māori employers to the income of all employers.
- Māori self-employed (without employees), multiplied by the total assets per employee, multiplied by the ratio of the income of self-employed Māori to the income of all self-employed persons.

Data sources

Data sources used to calculate the assets of Māori employers and self-employed include:

- Statistics New Zealand 2006 Census Data.
 - Number of self-employed, employers and employees by industry, by ethnicity.
 - Mean average incomes of employers and self-employees industry, by ethnicity.
- Statistics New Zealand Household Labour Force Survey (HLFS) (December 2012 and previous).
 - Growth in number of self-employed, employers and employees.
 - Growth in total employment by industry.
- Statistics New Zealand Annual Enterprise Survey (AES) (2012 and previous).
 - Total assets by industry (by top-level Australian and New Zealand Standard Industrial Classification (ANZSIC) categories).
- Statistics New Zealand Business Demography Statistics (2012 and previous).
 - Employment count by detailed ANZSIC categories.
- Statistics New Zealand Capital Goods Price Index (CGPI) (2012 and previous).

Specific data sources and how they were used are discussed below:

Asset per employee

This calculation was derived using Statistics New Zealand's AES. The AES provides data on the total assets of enterprises for each industry at the ANZSIC Division level of disaggregation. However, this survey has limited information on the ethnicity of those active in these enterprises. Latest AES data was available for the 2012 financial year.

Employee numbers are derived from Statistics New Zealand Business Demography Statistics. This Survey provided employee count numbers by industry at the ANZSIC Division level for March 2012. However, this survey has no information on the ethnicity of the employees. Appropriate growth rates in employment using data from Statistics New Zealand HLFS was applied to the March 2012 figures to generate employee numbers by industry for 2012.

Number of Māori employers and self-employed Māori

This data was derived from Statistics New Zealand 2006 Census information, which explicitly identifies ethnicity of individuals, their labour force status, and the industry in which they are active. This information is collated at the relevant ANZSIC 1996 v4.1 Division level.

This 2006 data was updated to 2012 using information from the HLFS. Growth in the number of employers and self-employed, at the all industry level, was used for this purpose.

Average employees per enterprise

To identify the average number of employees per enterprise, a combination of Census and HLFS data is used. 2006 Census data distinguishes by industry, different employees per enterprise



ratios. Further, HLFS figures indicate a noticeable increase in this ratio from 2006 to 2012. To incorporate this influence, HLFS growth figures were applied to employer and employee numbers by industry to generate 2012 ratios. To combine the superior coverage of the Census data, with the timeliness of the HLFS information, the ratio we adopt in each industry is the average of the 2006 Census ratio and the ratio updated using 2012 HLFS data.

Mean income

This data was sourced directly from 2006 Census information. Personal income, disaggregated by ethnicity, labour force status and industry was used

Special industries

Four of 17 industries were treated differently to the process outlined above.

For the mining & quarrying, electricity, gas and water, and government administration and defence industries, we assume there are no assets in enterprises associated with Māori employer or self-employed Māori in these industries. We have excluded government administration and defence from these calculations as this is not an industry in which assets can be invested by private entrepreneurs. We also exclude the mining and quarrying and the electricity, gas & water industries as they are capital (asset) intensive sectors with high initial set up costs. Consequently, we believe these are also not readily accessible to individual entrepreneurs.

In the case of the finance and insurance industry an alternative method is adopted. An alternative is necessary because the total assets figure obtained from the AES data includes banking sector loans. As a result this measure cannot be used to derive the value of assets underpinning enterprises in this industry. Consistent with previous approaches, we assume the mean annual individual income derived by Māori employers and self-employed Māori in this industry is equivalent to a 10 percent return on total assets. The relevant formula for enterprises associated with Māori employers in this industry is best summarised as:

- Māori employers, multiplied by the employee per enterprise ratio, multiplied by 10, multiplied by the mean annual income of Māori employers in the industry.
- self-employed Māori, multiplied by 10, multiplied by the mean annual income of self-employed Māori in the industry.

BUSINESS

To estimate Māori contribution to the GDP of the Waikato region and New Zealand in 2012, the BERL Computable General Equilibrium (CGE) is used.

This is an "economy wide" model as it describes the motivations and behaviour of all producers and consumers in an economy and the linkages among them. It depicts firms that respond to demand by purchasing inputs and hiring workers and capital equipment. The income generated from sales of firms' output ultimately accrues to households, who spend it on goods and services, taxes and saving. Tax revenue and savings lead to government and investor spending.

The combined demand by private households, government, and investors is met by firms who, to complete the circular flow of income and spending.

The Māori contribution to the Waikato economy was calculated using the GDP contribution separately within the CGE model.

EMPLOYMENT

Using both the 2006 Census and the BERL Regional Database, we are able to provide an estimate of the likely profile of the Māori labour market in 2012. By using this Regional Database in 2012, the estimate of total Māori employment by industry and by region was derived using the rate of change in employment by industry and by region between 2006 and 2012. The estimates of employment by industry by region in 2012 are used to inform labour force status, employment status, and employment by occupation.

HOUSEHOLD INCOME AND EXPENDITURE

Information on household income and expenditure' Māori households was estimated using the Social Accounting Matrix (SAM) for the Māori, the main modelling approach applied in the 'Asset base, income, expenditure and GDP of the 2010 Māori economy' (2011) report. Within the working tables of the SAM, activity of Māori households has been isolated.



DEFINITIONS

WAIKATO REGION

This report defines the Waikato region using Statistics New Zealand regional council boundaries for all aspects of the report apart from 'collectively owned assets'³⁸. For 'collectively owned assets', the Waikato region is defined in terms of Office of Treaty Settlement boundaries.

Eleven territorial authorities are, either fully or partially, within the boundaries of the Waikato Regional Council. Nine of these territorial authorities are fully within the boundaries of the regional council: Thames-Coromandel district, Hauraki district, Waikato district, Matamata-Piako district, Hamilton city, Waipa district, Otorohanga district, South Waikato district, Waitomo district. The majority of Taupo district boundaries are within the boundaries of the Waikato Regional Council. A small part of Rotorua district boundaries are within the Waikato Regional Council boundaries.

This report, where possible, provides breakdowns of the territorial authorities within the Waikato Regional Council boundaries.³⁹ Where breakdowns are provided, the nine territorial authorities that are fully within the boundaries are presented.⁴⁰ The entire Taupo district, including the small areas that are outside the Waikato Regional Council boundaries, is also presented. Rotorua district is not presented due to a large amount of employment and economic activity in the district occurring outside of the Waikato region. This means that the sum of the territorial authorities presented will not equal the Waikato Regional Council totals provided.

For the collectively owned asset base, Office of Treaty Settlement boundaries were used to define the coverage of the region. Settlement boundary areas identified as being in the Waikato region were: Ngāti Te Ata, Ngāti Tamaoho, Hauraki, Waikato-Tainui (Raupatu), Waikato-Tainui (River and other claims), Waitomo, Ngāti Maniapoto, Maraeroa A&B, Pouakani, Ngāti Raukawa, Ngāti Koroki Kahukura and Ngāti Haua. Settlement boundaries within the region that have been previously used to calculate the asset base of other areas were excluded from our definition of the region to minimise double counting.

The definition of the Waikato region for the collectively owned asset base does not directly align with the coverage of the Waikato Regional Council. In the broadest sense, the differences occur because the collective asset base: (1) includes Ngāti Maniapoto, which is part of the Waikato, Taranaki and Manawatu-Wanganui regional councils, and (2) does not cover the parts of Rotorua district that are included in the Waikato Regional Council boundary areas.

The iwi covered by the settlement areas used to estimate the value of collectively owned assets in the Waikato region are: Ngāi Tai (Hauraki), Ngāti Hako, Ngāti Hauā, Ngāti Hei, Ngāti Kearoa / Ngāti Tuarā, Ngāti Koroki Kahukura, Ngāti Maniapoto, Ngāti Maru (Hauraki), Ngāti Paoa, Ngāti Porou ki Harataunga ki Mataora, Ngāti Pūkenga ki Waiau, Ngāti Rāhiri Tumutumu, Ngāti Tahu / Ngāti Whaoa, Ngāti Tamaoho, Ngāti Tamaterā, Ngāti Tara Tokanui, Ngāti Turangitukua, Ngāti Tūwharetoa, Ngāti Whanaunga, Patukirikiri, Pouākani, Ngāti Raukawa, Rereahu, Waikato, Ngāti Hinerangi.

³⁸ Assets held in collective ownership through Māori authorities such as trusts and incorporations, rūnanga, and Treaty settlement entities.

³⁹ For a graphical outline of the territorial authorities within the boundaries of the Waikato region, see <http://www.lgnz.co.nz/assets/North-Island-PNG.PNG>

⁴⁰ Most employment and economic activity within the Taupo District occurs within the boundaries of the Waikato Regional Council.

Māori

For the purposes of the Statistics New Zealand Census of Population and Dwellings, Māori is defined as people who identify with the Māori ethnicity. Because ethnicity is self-perceived, people can identify with Māori ethnicity even though they are not descended from a Māori ancestor. Conversely, people can choose to not identify with Māori ethnicity even though they are descended from a Māori ancestor. Ethnicity is not the same as birthplace.

In this report, the numbers in the total employed columns in the industry and occupation tables do not add up because the 'Not Elsewhere Included' category may include some Māori as Statistics New Zealand makes adjustments to their ethnic breakdown calculations. In other words, the not elsewhere included category is deducted from the total. This procedure is adopted for calculating ethnic proportions since we don't know how many Māori or non-Māori fall into the not elsewhere included category. This method is used by Statistics New Zealand when providing ethnicity proportions.

Industry classification

The industry classifications used in this research are the Australian and New Zealand Standard Industrial Classification (ANZSIC) 1996 version 4.1. This is a hierarchical classification with four levels: divisions (the broadest level), subdivisions, groups and classes. For the purposes of this research we have examined industries at the divisional level. This level provides a limited number of categories that show a broad picture of the economy and suitable for the publication of summary tables of official statistics. It should be noted that there is various categories under each of these classifications such as food and wood processing are classified under manufacturing.

Employment

In regards to employment, the Statistics New Zealand Census of Population and Dwellings refers to people who are aged 15 years and over and usually resident in New Zealand that are in paid full or part-time work as 'employed'.

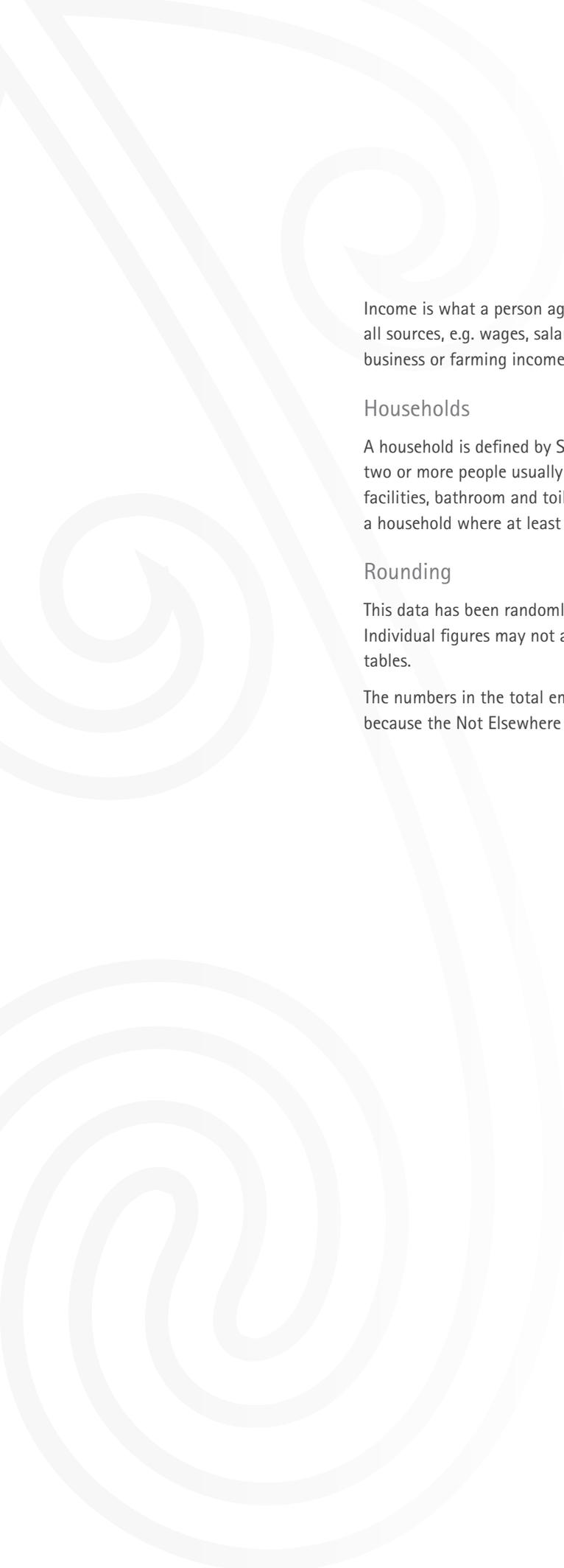
Full-time employment refers to a person who usually works 30 hours or more per week. People who are employed part-time usually work fewer than 30 hours per week, but more than 1 hour per week.

Self-employed includes people whose main earnings in the tax year came from self-employment. Self-employment includes people who operate their own enterprise or engage independently in a profession or trade, and receive earnings from this. Self-employed and without employees refers to people who operate their own economic enterprise or engage independently in a profession or trade (including partnerships) and hire no employees. Employed is related to work in the seven days prior to the Census date in 2006.

Working age population refers to the population aged 15 years and over.

Unemployed refers to all people in the working-age population who during the reference week were without a paid job, were available for work and had actively sought work in the past four weeks ending with the reference week or had a new job to start within four weeks.





Income is what a person aged 15 years and over receives before tax for a financial year from all sources, e.g. wages, salary, social welfare payments, interest, dividends, commission, pre-tax business or farming income (less expenses).

Households

A household is defined by Statistics New Zealand as either one person usually living alone, or two or more people usually living together and sharing facilities (e.g. eating facilities, cooking facilities, bathroom and toilet facilities, a living area), in a private dwelling. A Māori household is a household where at least one occupant is of Māori ethnicity.

Rounding

This data has been randomly rounded by Statistics New Zealand to protect confidentiality. Individual figures may not add up to totals, and values for the same data may vary in different tables.

The numbers in the total employed columns in the industry and occupation tables do not add up because the Not Elsewhere Included category may include some Māori as well as Non-Māori.

ANNEX 1 MĀORI DESCENT POPULATION IN THE WAIKATO REGION

In addition to information about Māori ethnicity, the Census also captures information about Māori descent. Unlike ethnicity, which refers to cultural affiliation, descent relates to ancestry. This annex provides a profile of the Māori descent population in the Waikato region using 2013 and 2006 Census information.

In 2013, a total of 669,000 people were of Māori descent nationally. Of this figure, 14 percent (92,000) were from the Waikato region. For 2006 and 2013 the Māori descent population growth in the Waikato region (7 percent) was greater than Māori descent population growth nationally (4 percent).

Table A.1 shows the Māori descent population in the Waikato region from the 2006 and 2013 Censuses.

Table A1: Māori descent population in the Waikato region and New Zealand, 2006 and 2013

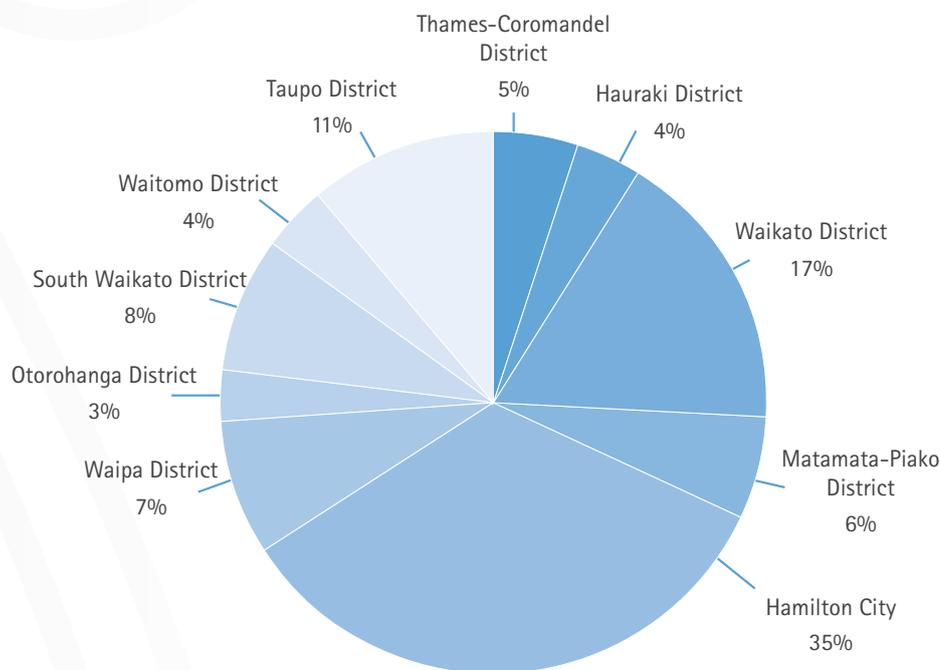
	Māori Descent Population		
	2006	2013	% Change 2006-2013
Waikato Region	85,422	91,635	7.3%
New Zealand	643,980	668,724	3.8%

Source: Statistics New Zealand 2006 and 2013 Censuses of Population and Dwellings

At a territorial authority level, the distribution of people of Māori descent across the Waikato region is similar to the distribution of the usual resident Māori ethnic population. Just over a third of the Māori descent population in the Waikato region were in Hamilton city in 2013. Other districts with a large number of people of Māori descent in 2013 were Waikato district (17 percent) and Taupō district (11 percent). Figure A.1 shows a breakdown of the Māori descent population in the Waikato region in 2013.



Figure A1: Māori descent population in the Waikato region by district, 2013



For 2006 and 2013 censuses the Māori descent population grew strongly in Hamilton city (up 13 percent) as well as the Matamata-Piako and Waipa districts (both up 11 percent). The Māori descent population declined in Waitomo district (down 4 percent), South Waikato district (3 percent) and Otorohanga district (2 percent) over the same period. Table A.2 shows the change in the Māori descent population within the Waikato region between 2006 and 2013.

Table A2: Māori descent population in the Waikato region by district, 2006 and 2013

	Māori Descent Population		
	2006	2013	% Change 2006-2013
Thames-Coromandel District	4,887	4,881	0%
Hauraki District	3,873	4,011	4%
Waikato District	14,022	15,345	9%
Matamata-Piako District	4,788	5,316	11%
Hamilton City	27,429	31,035	13%
Waipa District	6,726	7,491	11%
Otorohanga District	2,538	2,484	-2%
South Waikato District	7,344	7,137	-3%
Waitomo District	3,705	3,570	-4%
Taupo District	9,333	9,546	2%
Waikato Region	85,422	91,635	7%
New Zealand	643,980	668,724	4%

Source: Statistics New Zealand 2006 and 2013 Censuses of Population and Dwellings





Te Puni Kōkiri
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