



AIDE MEMOIRE

Dashboard updates to (non-fuel) supply chains for critical sectors and key goods – 13 April 2026

Date:	13 April 2026	Priority:	High
Security classification:	Restricted	Tracking number:	0030608

Information for Minister(s)
Ministerial Economic Security and Supply Chains Group
Hon Nicola Wills Minister of Finance
Hon Chris Bishop Associate Minister of Finance
Hon Simeon Brown Minister for Energy
Hon David Seymour Associate Minister of Finance
Hon Shane Jones Associate Minister of Finance, Associate Minister for Energy

Contact for telephone discussion (if required)				
Name	Position	Telephone		1st contact
		DDI	Cell	
Sebastian Doelle	Manager, Trade and Supply Chains		Privacy of natural persons	✓
Hannah Overton-Holmes	Principal Policy Advisor, Supply Chains Response Team	Privacy of natural persons		

The following departments/agencies have been consulted
Ministry for Primary Industries, Ministry of Foreign Affairs and Trade, Ministry of Health, Ministry of Transport, The Treasury

- Minister's office to complete:
- | | | |
|--|---|------------------------------------|
| <input type="checkbox"/> Noted | <input type="checkbox"/> Approved | <input type="checkbox"/> Declined |
| <input type="checkbox"/> Overtaken by Events | <input type="checkbox"/> Needs change | <input type="checkbox"/> Seen |
| | <input type="checkbox"/> See Minister's Notes | <input type="checkbox"/> Withdrawn |

Comments



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Purpose

To provide you with an update of material changes to supply chain risks for critical sectors and key goods (excluding fuel) since 2 April 2026 [MBIE Briefing 0030146 refers].

Sebastian Doelle
Manager, Trade and Supply Chains
Communications, Trade, and Investment, MBIE

13 / 04 / 2026

Key messages

The overall risk status for non-fuel supply chains is unchanged

1. Across the products we are monitoring, we consider there is limited risk of shortage in the short term, with our assessment of risks either remaining unchanged or lowered since our last report on 2 April 2026 [MBIE Briefing 0030146 refers].

2. Free and frank opinions [Redacted]

[Redacted]

[Redacted]

a. **Polypropylene.** Free and frank opinions [Redacted]
[Redacted] Officials are seeking further information, but early indications from

- b. **Polyvinyl Chloride (PVC).** Free and frank opinions [redacted] widespread use across multiple manufactured products and the potential of significant cross-sector impacts if supply chains are disrupted.
 - c. **Styrene.** Free and frank opinions [redacted] reports that supply is stable, but there are upstream risks to naphtha, which is a key input.
5. All information presented in this update is based on data and feedback as of 10am, 13 April 2026. Please see Annexes One and Two for further detail.
6. We are continuing to work with relevant government and private sector stakeholders to monitor the situation and identify key risks and any anticipated shifts in supply chains over the coming months. We will provide regular updates to Ministers on any risks identified.

Next steps

7. We do not recommend taking any decisions in response to this update. We will continue to monitor a broad range of goods to ensure the dashboards remain fit for purpose. This includes removing items where weekly updates are no longer required and adding new items where emerging risks require more frequent monitoring.
8. We will provide the next dashboard update on Monday 20 April 2026.

Annexes

Annex One: Dashboard Overview Table

Annex Two: Dashboards

Annex One: Dashboard Overview Table

Dashboard overview: non-fuel critical sectors and goods

Sector/ Goods	Product (HS-4/6)	Rationale for risk rating change	02/04 risk rating	13/04 risk rating
Critical chemicals	Aluminium Sulphate		Free and frank opinions	
	Acetic Acid			
	Sodium Hypochlorite			
	Carbon Dioxide			
	Caustic Soda			
	Chlorine Gas			
	Polyethylene (PE)			
	Polypropylene	International reporting on strained supply. Officials seeking further information, Commercial Information		
	Polyvinyl Chloride (PVC)	Free and frank opinions		
	Styrene	Some upstream risks from naphtha but no reports of impacts to existing supply.		
Fertiliser	Petroleum-based lubricants	Despite being a petrol by-product there are no significant stakeholder concerns being expressed and no price changes.		
	Helium	Commercial Information		
Health	Urea			
	Pharmaceuticals			
Constructi on Materials	Medical Devices			
	Adhesives	Free and frank opinions Import only but from non-impacted countries. No stakeholder concerns raised. Free and frank opinions		
	Resins			
	Toluene			
	Bitumen			

*All datasets are indicative estimates, reliant on information provided to MBIE and publicly available at the time of consolidation and remain subject to revision.

Free and frank opinions

[RESTRICTED]

Te Kāwanatanga o Aotearoa
New Zealand Government

Annex Two: Dashboards



**MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
HĪKINA WHAKATUTUKI

Product dashboards non-fuel critical sectors and goods

13 April 2026



Dashboard methodology

Free and frank opinions

Information on data

- This is based on data available on 10 April 2026.
- All datasets are indicative estimates, reliant on information provided to MBIE from industry, other government agencies, and publicly available at the time of consolidation.
- Given the current global environment, data is subject to sudden change.
- Descriptions for each product are included in the glossary.

Why data is aggregated

- Data is recorded inconsistently across countries and is often not available at a reliable product level.
- Where appropriate, goods have been aggregated into criteria classes or sectors to provide an indicative view of overall supply chain conditions.
- MBIE is engaging with relevant stakeholders to improve visibility and will flag additional relevant goods over time where appropriate.

Financial indicators

- Due to the high level of product aggregation, some pricing and detailed insights are not yet available.

Price changes

- Price movements within 5% are considered normal variation in pricing. Above 5% is marked indicated with an arrow.
- Expected movements within this range (typical market fluctuations) are marked with a '-' symbol to indicate stability.

Critical Chemicals - water treatment (1 of 2)

Sector commentary

- **No change to stability ratings.**
- Drinking water and wastewater treatment is highly reliant on imported chemical availability.
- Commercial Information [Redacted]
- We are continuing to seek insights on current and future stock levels.

Product commentary

Aluminium Sulphate

- Manufactured domestically, but supply is reliant on inputs of imported goods. Commercial Information [Redacted]

Acetic Acid

- While New Zealand is fully import dependent, Commercial Information [Redacted]

Sodium Hypochlorite

- Domestic manufacturing accounts for around 40% of domestic manufacturing and supports supply stability.
- Hazardous, difficult to transport and store. Limited ability to hold large inventories due to degradation over time.

Aluminium Sulphate

Free and frank opinions [Redacted]



0% —

Price change since February

\$0.385

Market price USD/MT as at December 2025

Key supply partners:

- China (61%)
- Indonesia (31.4%)



Commercial Information [Redacted]

Acetic Acid

Free and frank opinions [Redacted]



-27.12% ▼

Price change since February

\$0.43

Market price USD/KG as at March 2026

Key supply partners:

- Singapore (57.5%)
- Korea (29.6%)



TBC

Estimated supply

Sodium Hypochlorite

Free and frank opinions [Redacted]



+2.27% —

Price change since February

\$0.44

Market price USD/KG as at March 2026

Key supply partners:

- Australia (55.3%)
- China (23%)
- Japan (10.5%)



TBC

Estimated supply

Critical Chemicals - water treatment (2 of 2)

Product commentary

Carbon Dioxide (CO₂)

- Majority of CO₂ in New Zealand is produced domestically and supplemented with imports.

- Commercial Information [Redacted]

Caustic Soda (Sodium hydroxide)

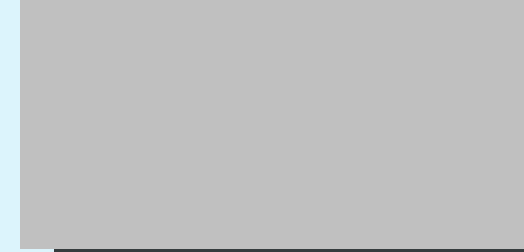
- Commercial Information [Redacted]
- Caustic soda is integrated with PVC production. Free and frank opinions [Redacted]

Chlorine Gas

- Commercial Information [Redacted]

Carbon Dioxide

Free and frank opinions



-1.3% —

Price change since February

\$0.76

Market price USD/KG as at March 2026

Key supply partners:

- Australia (68.6%)
- Singapore (12.5%)



TBC

Estimated months of supply

Caustic Soda

Free and frank opinions



0% —

Price change since February

\$0.36

Market price USD/KG as 1 April 2026

Key supply partners:

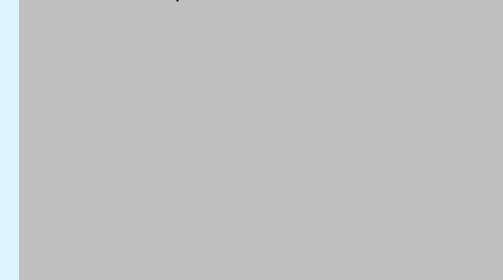
- China (53.7%)
- Korea (18.6%)
- Taipei (10.5%)



Commercial Information [Redacted]

Chlorine Gas

Free and frank opinions



-26.25% ▼

Price change since February

\$0.59

Market price USD/KG as at March 2026

Key supply partners:

- Australia (88.5%)



Commercial Information [Redacted]

Critical Chemicals

Sector commentary

- Commercial Information
- Goods under this criterion are likely to have significant cross-sector impacts if supply chains are disrupted due to their widespread use as inputs across multiple manufactured products.
- Commercial Information

Product commentary

Petroleum based lubricant (engine oils, hydraulic oils, and industrial greases)

- New Zealand is reliant on imported base products and limited domestic blending capability.

Helium

- Helium manufacturing in Qatar ceased due to direct Iranian strikes, raising concerns. We have not heard reports of this impacting supply to New Zealand.

Petroleum based lubricants

Free and frank opinions



+40.45% ▲

Price change since February
\$1073/MT
 Market price USD/MT as at March 2026

Key supply partners:

- South Korea (55.4%)
- Singapore (28.4%)



TBC

Estimated months of supply

Helium

Free and frank opinions



+5.73% ▲

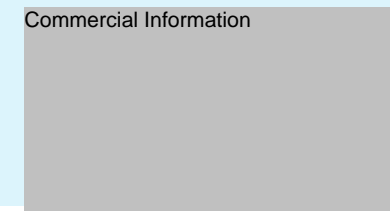
Price change since February
\$146.97
 Market price USD/cubic metre as at March 2026

Key supply partners:

- Australia (49.3%)
- China (35.2%)



Commercial Information



Plastics (1 of 2)

Sector commentary

- **Three products (polypropylene, PVC and styrene) are new additions to the dashboard.**
- Plastic products have widespread use as inputs across multiple manufactured products. Disruption to these supply chains would likely have significant cross-sector impacts.
- Commercial Information [Redacted]
- International relations [Redacted]
- Officials are continuing to work with the plastics sector to understand the end-to-end impacts on the domestic market and exports

Product commentary

Polyethylene (PE)

- Free and frank opinions [Redacted] major Asian suppliers to New Zealand have declared force majeure. Commercial Information [Redacted]

Polypropylene

- Commercial Information [Redacted]

Polyethylene (PE)

Free and frank opinions



+6.24% ▲

Price change since March
\$1242

Market price USD/T as at
10 April 2026

Key supply partners:

- Middle East (22%)
- Asia (excluding China) (56%)



Commercial Information [Redacted]

Polypropylene

Free and frank opinions



+12.38% ▲

Price change since March
\$1321.76

Market price UDS/T as at
10 April 2026

Key supply partners (80.7%):

- South Korea (56.8%)
- Australia (10.3%)



Commercial Information [Redacted]

Plastics (2 of 2)

Product commentary

Polyvinyl Chloride (PVC)

- New Zealand's PVC supply is exposed due to its ethylene input and Middle-East linked trade flows.

- Commercial Information [Redacted]

Styrene

- Commercial Information [Redacted]

Polyvinyl Chloride (PVC)

Free and frank opinions [Redacted]



-5.35% ▼
 Price change since March 2026
\$731.11
 Market price USD/T as at
 10 April 2026

Key supply partners:

- China (54.7%)
- Germany (7.3%)



Commercial Information [Redacted]

Styrene

Free and frank opinions [Redacted]



+38.3% ▲
 Price change over March 2026
\$1547
 Market price USD/tonne as at
 March 2026

Key supply partners:

- South Korea (41.8%)
- Taiwan (33.5%)



Commercial Information [Redacted]



Pharmaceuticals and medical devices

Sector commentary

- No change to stability ratings
- Due to the high level of product aggregation, pricing and detailed insights cannot be displayed. Product stability in this category is dependent on key inputs such as plastics.
- Due to contractual obligations, the price of pharmaceutical products is unlikely to change as a result of fuel surcharges, and pharmaceutical suppliers are responsible for securing and delivering two months' supply due to specific contractual clauses and financial penalties.
- MBIE and Ministry of Health are in regular contact and working to improve available data and alignment in reporting.

Product commentary

- There are four supply issues currently being managed by Pharmac relating to the Middle East conflict. Pharmac advises 3 of these currently have no risk to New Zealanders.
- One product, Isosorbide mononitrate long-acting tabs (a heart medication) is now being actively managed due to increased demand combined with delay in product arriving due to Middle East conflict. Alternative funded treatment is available. An estimated 2300 people currently use this medicine.
- Medical devices are different due to the less robust rules on stock compared to pharmaceuticals. Agencies are working improve reporting and identify any potential risks to medical devices.


*Due to the widespread nature of these products, this information is highly aggregated and is an estimation of *all* pharmaceutical products and medical devices. The country of origin for these imports is highly diversified and we have displayed only the top few of New Zealand's supply partners.

Pharmaceuticals*

Free and frank opinions

Key supply partners:

- Australia (17.7%)
- USA (12.9%)



N/A


Commercial Information

Medical devices*

Free and frank opinions

Key supply partners:

- USA (26.6%)
- China (13.9%)



N/A

Commercial Information



Construction materials (1 of 2)

Sector commentary

- Free and frank opinions [Redacted]
- Construction sector primarily concerned with widespread increased costs across all key inputs (timber, PVC, PE).
- Stability in the sector is dependent on key inputs such plastics and fuel supply.
- MBIE is working with major procuring agencies to consider construction contract guidance to help manage cost escalation and potential delays arising from Iran conflict related disruptions.
- Commercial Information [Redacted]

Product commentary

Adhesives


- No NZ production of petroleum inputs. Stakeholders have not yet identified any concerns securing supply of adhesives.

Petroleum Resins

- Commercial Information [Redacted]


Adhesives

Free and frank opinions [Redacted]

 **N/A**


Key supply partners:

- Australia (31.2%)
- Germany (22.3%)
- USA (19.7%)

 **TBC**
Estimated months of supply

Petroleum Resins


Free and frank opinions [Redacted]

 **-4.05%** ▼
Price change since February

\$1.42
Market price USD/KG as at February 2026

Key supply partners:

- China (75.9%)
- Republic of Korea (9.9%)

 Commercial Information [Redacted]

Adhesives prices have been significantly impacted since the end of February. It is difficult to provide a comprehensive pricing figure as it contains a broad range of products. Proxies (eg precursor chemicals used in adhesives) have been used to form an indicative database on price changes and have supported internal decisions on overall risk ratings.



Construction materials (2 of 2)

Product commentary

Solvent (Toluene)

- By product of oil refining.

- Commercial Information [Redacted]

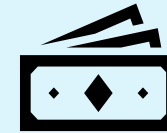
Bitumen (Construction)

- By product of oil refining. Concentrated supply in Asia.

- Commercial Information [Redacted]

Solvent (Toluene)

Free and frank opinions [Redacted]



-2.74% —

Price change since February
\$0.71
 Market price USD/KG as at
 March 2026



TBC

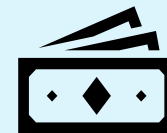
Estimated months of
 supply

Key supply partners:

- Republic of Korea (63.2%)
- Thailand (21.6%)
- Singapore (14.1%)

Bitumen (Construction)

Free and frank opinions [Redacted]



+10.43% ▲

Price change since March
\$601.64
 Market price USD/T as at
 10 April 2026



Commercial Information [Redacted]

Key supply partners:

- Malaysia (76.3%)
- USA (23.1%)



Product Glossary

Critical Chemicals

- **Petroleum based lubricant (engine oils, hydraulic oils, industrial grease)** – Fluids and greases refined from crude oil and formulated with performance additives to reduce friction, wear, and heat between moving surfaces.
- **Helium** – Helium supports essential services including medical imaging, AI datacenters and advanced manufacturing.
- **Aluminium Sulphate** – A low-cost, water-soluble aluminium salt commonly used as a coagulant to remove dirt and impurities from water and wastewater treatment.
- **Acetic Acid** – Used for pH adjustment and neutralisation which is essential to maintaining safe and compliant water services.
- **Sodium Hypochlorite** – Essential for water disinfection. Hazardous, difficult to transport and limited ability to hold large inventories due to degradation over time.
- **Carbon Dioxide** – Mainly captured as a by-product of ammonia and hydrogen production, this colourless, odourless, non-flammable gas is used widely across food, medical, industrial, water treatment, agricultural, and logistics sectors.
- **Caustic Soda** – Critical industrial chemical for cleaning, with demand concentrated in water utilities, councils, food and beverage processors, pulp and paper, mining/metals, and chemical manufacturing.
- **Chlorine** – Critical input for drinking water and wastewater treatment. Can be supplied as a compressed or liquefied gas, or converted into chlorine-based solutions for disinfection uses. Hazardous and difficult to transport and store.

Plastics

- **Polyethylene** – Polyethylene is the world's most widely produced plastic. It is a lightweight, chemically resistant, and highly versatile material used in everything from packaging films to fuel tanks.
- **Polypropylene** – Polypropylene is a versatile, durable, and lightweight thermoplastic polymer. It has high heat resistance, chemical inertness, strength, and is widely used in packaging, automotive parts, medical devices and textiles.
- **Polyvinyl Chloride (PVC)** – PVC is a synthetic thermoplastic polymer used in a wide range of finished products, such as pipes, profiles, sheets, and fittings.
- **Styrene** – Styrenic polymers are used in food packaging, seafood export systems, construction products, and a range of consumer and industrial applications.

Fertilisers

- **Urea** – Urea is a critical chemical with limited domestic production Commercial Information and is essential for fertiliser use and diesel exhaust fluid (AdBlue), which most diesel vehicles rely on to operate in New Zealand.

Pharmaceuticals and Medical Devices

- Due to the widespread nature of these products, this information is highly aggregated and is an estimation of all pharmaceutical products and medical devices.

Construction materials

- **Solvent (Toluene)** – By-product of oil refining. Widely used globally in paints and adhesives. Other petroleum solvents include xylene, naphtha, mineral spirits, etc.
- **Bitumen** – By-product of oil refining with viscosity and waterproof features ideal for road construction and maintenance, civil infrastructure and construction.
- **Adhesives** – Polymer-based blends formulated to bond surfaces. Has inputs derived from oil refining and key uses are for packaging, labelling, and wood products.
- **Petroleum Resins** – By-product of oil refining. Large number of uses including paint manufacture and primarily used as a binder for multiple applications.