



## AIDE MEMOIRE

### Dashboard updates to (non-fuel) supply chains for critical sectors and key goods – 2 April 2026

<b>Date:</b>	2 April 2026	<b>Priority:</b>	High
<b>Security classification:</b>	Restricted	<b>Tracking number:</b>	0030146

<b>Information for Minister(s)</b>
<b>Ministerial Economic Security and Supply Chains Group</b>
Hon Nicola Wills <b>Minister of Finance</b>
Hon Chris Bishop <b>Associate Minister of Finance</b>
Hon Simon Watts <b>Minister for Energy</b>
Hon David Seymour <b>Associate Minister of Finance</b>
Hon Shane Jones <b>Associate Minister of Finance, Associate Minister for Energy</b>

<b>Contact for telephone discussion (if required)</b>				
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		

- 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 Withdrawn |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

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To provide you with an update of material changes to supply chain risks for critical sectors and key goods (excluding fuel) since 18 March 2026 [MBIE Briefing 0029-749 refers].

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

2 / 04 / 2026

### Key messages

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#### 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 18 March 2026 [MBIE Briefing 0029-749 refers]. 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.

2. Free and frank opinions
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3. We have removed the following nine products due to their ongoing green rating. We will continue monitoring these products and add them back to the dashboard if the supply risk increases.

Sector	Products	Free and frank opinions
Fertiliser	Phosphate Rock; potash; Sulphur; ammonia	
Pastoral Farming	Bulk animal food; Machinery for food production; cereals, oils and sugars for food production	

4. All information presented in this update is based on data and feedback as of 30 March 2026. Please see Annexes One and Two for further detail.

Free and frank opinions

## Context updates since previous dashboard update

**Helium** - Free and frank opinions

On 19 March 2026, Iranian missiles and drones struck the world's largest helium production facility in Qatar. Supply from this facility is unlikely to resume in the medium term.<sup>1</sup>

<sup>1</sup>Free and frank opinions

6. Helium has a variety of uses in New Zealand, including healthcare and medical imaging for MRI scanners, research laboratories for cryogenics, low temperature physics, and analytical equipment and aerospace. Confidential information entrusted to the Government

**Water treatment chemicals –** Free and frank opinions

7. Confidential information entrusted to the Government

Some chemicals are downstream products of gas and oil extraction and for others, New Zealand is disproportionately reliant on supply from a small number of countries.

Commercial Information

9. Free and frank opinions

**Plastics -** Free and frank opinions

10. We are not aware of any imminent shortages affecting New Zealand industry. Free and frank opinions  
major Asian suppliers to New Zealand have declared force majeure. Supply to New Zealand appears to be available, however the industry is facing significant price increases.

11. Commercial Information

12. Officials from MBIE, Ministry for Primary Industries, and Ministry of Health are continuing to engage closely with stakeholders to verify this feedback and to have a more comprehensive understanding of the flows of plastics into the country, the impacts on domestic conversion, and the impact on end users. We expect to receive updated information over the next week, which will inform more detailed advice to Ministers.

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<sup>2</sup> Commercial Information

13. Confidential information entrusted to the Government



## We continue to engage with our Australian counterparts on non-fuel supply chains

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14. On 27 March 2026, MBIE officials met with colleagues from Australia’s Office of Supply Chain Resilience to share insights from recent engagement and discuss our respective policy approaches. <sup>International relations</sup>
- This is reflected in the 28 March 2026 announcement that the Australian Government would underwrite the purchase of additional cargoes of fuel and other vital supplies, including fertiliser, by private suppliers from the international market.

## Next steps

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15. We do not recommend taking any decisions in response to this update. We are preparing advice on potential policy interventions the Crown could deploy if the situation changes.
16. The attached dashboards reflect our current assessment of which critical sectors and key goods require active monitoring. A sustained conflict in the Middle East could begin to affect non-fuel supply chains in new ways. We are routinely adapting the dashboards in response to our evolving understanding of global supply chain pressures. We are also rationalising the dashboards by removing items where weekly updates are no longer required. We will continue to monitor a broad range of goods to ensure the dashboards remain fit for purpose.
17. You will receive the next dashboard update for your next weekly Economic Security and Supply Chains meeting in the week of 13 April.

## Annexes

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**Annex One:** Dashboard Overview Table

**Annex Two:** Dashboards

# Annex One: Dashboard Overview Table

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# Dashboard overview: non-fuel critical sectors and goods

Sector/ Goods	Product (HS-4/6)	Goods Spotlight	**Est level of stability
Critical chemicals	Aluminium Sulphate	Critical in water and wastewater treatment. High levels of New Zealand manufacturing but reliant on several imported products. <span style="background-color: #cccccc;">Commercial Information</span>	Free and frank opinions
	Acetic Acid	Used across multiple sectors but critical for water supply. Used for pH adjustment. <span style="background-color: #cccccc;">Commercial Information</span>	
	Sodium Hypochlorite	Essential for water disinfection but difficult to store as it is a hazardous product which degrades over time. Ongoing engagement with stakeholders to clarify level of stock available.	
	Carbon Dioxide	Mainly captured as a by-product of ammonia and hydrogen production. Domestic production provides resilience in carbon dioxide supplies, with new production plants in Australia providing further security.	
	Caustic Soda	Critical industrial chemical for cleaning and demand concentrated in water utilities.	
	Chlorine Gas	Critical input for water treatment. Some local production, with <span style="background-color: #cccccc;">Commercial Information</span> supply from Australia.	
	Polyethylene (PE)	<span style="background-color: #cccccc;">Commercial Information</span> <span style="background-color: #cccccc;">Commercial Information</span> <span style="background-color: #cccccc;">Commercial Information</span> Officials are continuing to work to understand the end-to-end impacts on the domestic market and exports.	
	Petroleum-based lubricants	By-product of oil refining. Not manufactured in New Zealand and has limited domestic blending capability. Vital for all transport and industrial processes.	
	Helium	Used mainly for MRI cooling and data centres, with no domestic manufacturing <span style="background-color: #cccccc;">Commercial Information</span> . Recent conflict has disrupted helium production in Qatar, and <span style="background-color: #cccccc;">Free and frank opinions</span>	
Fertiliser	Urea	By-product of gas refining. Used widely for fertiliser and as a key input for diesel exhaust fluid. Global urea and fertiliser shortages are emerging due to Hormuz disruptions, halted Qatari output, Chinese export controls, and LNG shortages in South Asia.	
Health	Pharmaceuticals	Pharmac is managing three medicine supply issues relating to the Middle East conflict. Pharmac advises that there are currently no impacts to New Zealanders at this time. Health NZ has activated the National Coordination Centre to monitor emerging Middle East risks. Contingency planning and coordination with partners is underway across critical services.	
	Medical Devices	There are currently no medical device supply issues directly due to the Middle East conflict.	
Construction Materials	Adhesives	Many adhesives have inputs derived from oil refining. No New Zealand production of petroleum inputs. Dependant on other key inputs such as plastics. Stakeholders have not yet identified any concerns.	
	Resins	By-product of oil refining. No New Zealand manufacturer of petroleum precursors. Large number of uses including paint manufacture. <span style="background-color: #cccccc;">Commercial Information</span>	
	Toluene	By-product of oil refining. Not manufactured in New Zealand. Widely used globally and used in paints and adhesives. Stakeholders have not yet identified any concerns.	
	Bitumen	<span style="background-color: #cccccc;">Commercial Information</span>	

\*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

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

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# **Product dashboards non-fuel critical sectors and goods**

30 March 2026



# Dashboard methodology

Free and frank opinions

## Information on data

- This is based on data available on 30 March 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

- **Products are new additions to the dashboard**
- Drinking water and wastewater treatment is highly reliant on imported chemical availability.
- Commercial Information
- 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

### Acetic Acid

- While New Zealand is fully import dependent, Commercial Information

### 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



0% —

Price change since February  
**\$0.385**  
 Market price USD/KG as at  
 December 2025

### Key supply partners:

- China (61%)
- Indonesia (31.4%)
- Australia (6.7%)

## Commercial Information

## Acetic Acid

Free and frank opinions



0% —

Price change since  
 February  
**\$0.59**  
 Market price USD/kg as at  
 February 2026

### Key supply partners:

- Singapore (57.5%)
- Korea (29.6%)
- China (6.7%)
- Australia (3%) and Germany (1%)



**TBC**

Estimated months of  
 supply

## Sodium Hypochlorite

Free and frank opinions



0% —

Price change since  
 February  
**\$0.44**  
 Market price USD/kg as at  
 February 2026

### Key supply partners:

- Australia (55.3%)
- China (23%)
- Japan (10.5%)
- United States (6.9%) and Austria (2.4%)



**TBC**

Estimated months of  
 supply

# Critical Chemicals - water treatment (2 of 2)

## Sector commentary

- Products are new additions to the dashboard
- 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.

## Product commentary

### Carbon Dioxide (CO<sub>2</sub>)

- Commercial Information [Redacted]

### Caustic Soda (Sodium hydroxide)

- Commercial Information [Redacted]

### Chlorine Gas

- Commercial Information [Redacted]

## Carbon Dioxide

Free and frank opinions



**1.3% —**

Price change since February  
\$0.76

Market price USD per KG



**TBC**

Estimated months of supply

### Key supply partners:

- Australia (68.6%)
- Singapore (12.5%)
- Taipei (5.3%)
- China (3.2%)
- Malaysia (2.5%)

## Caustic Soda

Free and frank opinions



**0% —**

Price change since February  
\$0.11

Market price USD per KG

### Key supply partners:

- China (53.7%)
- Korea (18.6%)
- Taipei (10.5%)
- Thailand (6.8%)

Commercial Information

## Chlorine Gas

Free and frank opinions



**26.30% ▼**

Price change since February

\$0.59

Market price USD per KG

### Key supply partners:

- Australia (88.5%)
- China (5.4%)
- Thailand (4.2%)
- USA (1.9%)

Commercial Information

# Critical Chemicals

## Sector commentary

- **No change to stability ratings**
- 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.

## Product commentary

### Plastics (polyethylene or PE)

- New Zealand is not facing immediate supply issues.
- Commercial Information
- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]
- Officials are continuing to work with the plastics sector to understand the end-to-end impacts on the domestic market and exports.

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

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

### Helium

- On 18 and 19 March, helium manufacturing in Qatar ceased due to direct Iranian strikes, raising concerns.
- Continued disruptions could create downstream impacts for New Zealand's due to reduction in global helium supply.

## Plastics (polyethylene or PE)

Free and frank opinions



**26.3%** ▲

Price change since February  
**\$1235**  
 Market price USD per tonne

### Commercial Information

#### Key supply partners:

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

## Petroleum based lubricants

Free and frank opinions



**0%** —

Price change since February  
**\$764.00**  
 Market price USD per tonne



**TBC**

Estimated months of supply

#### Key supply partners:

- South Korea (55.4%)
- Singapore (28.4%)
- Japan (6.9%)
- China (4.4%) & Malaysia (2.2%)

## Helium

Free and frank opinions



**21.5%** ▲

Price change since February  
**\$152.70**  
 Market price USD per cubic metre

### Commercial Information

#### Key supply partners:

- Australia (49.3%)
- China (35.2%)
- United Kingdom (7.3%)
- France (4.9%) & United States (2.5%)

# Fertiliser

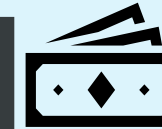
## Sector commentary

- **No change to stability rating.**

- Commercial Information [Redacted]

## Urea

Free and frank opinions



**34.3%** ▲

Price change since February

**\$601.00**

Market price USD per tonne

### Key supply partners:

- Saudi Arabia (58.9%)
- Malaysia (22.9%)
- Vietnam (9%) & Brunei (5%)

## Commercial Information



# 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**.
- The Ministry of Health have activated a crisis response and are in contact with Australian counterparts.

## Product commentary

- There are **four supply issues currently being managed** by Pharmac relating to the Middle East conflict. Pharmac advises that there are currently no impacts to New Zealanders, and they are monitoring stock levels and supply risks closely.
- Due to contractual obligations, the price of pharmaceutical products is unlikely to change as a result of fuel surcharges.
- Pharmaceutical suppliers are responsible for securing and delivering two months' supply due to specific contractual clauses and financial penalties.
- Medical devices are different due to the broad range of products and purchasing approaches. Agencies are working to build specificity into our understanding of levers/safeguards reporting.

Free and frank opinions



N/A


**Commercial Information**

**Key supply partners:**

- Australia (17.7%)
- USA (12.9%)
- Germany (9.4%)
- UK (7.4%)
- Switzerland (5.6%)

Free and frank opinions

### Medical devices\*



N/A

**Commercial Information**

**Key supply partners:**

- USA (26.6%)
- China (13.9%)
- Australia (9.1%)
- Germany (7.1%)

\*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.

# Construction materials (1 of 2)

## Sector commentary

- **No change to stability ratings**
- No reported concerns on supply chain impacts or product availability.
- 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.
- Available price data is lagging. Officials will continue to investigate.
- While widespread delays have not yet materialised, risks are emerging due to cost volatility through the procurement supply chain. In response, MBIE is working with major agencies to consider construction contract guidance to help manage cost escalation and potential delays arising from Iran conflict related disruptions.

## Product commentary

### Adhesives

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


### Petroleum Resins

- Commercial Information




### Adhesives

Free and frank opinions



**N/A**  
Price change since February  
**\$5.15 –**  
Market price USD per KG as at December 2025




**TBC**  
Estimated months of supply

**Key supply partners:**

- Australia (31.2%)
- Germany (22.3%)
- USA (19.7%)
- Italy (6.5%)
- China (4.1%)

### Petroleum Resins

Free and frank opinions



**N/A**  
Price change since February  
**\$1.86 –**  
Market price USD per KG as at January 2026

**Key supply partners:**

- China (75.9%)
- Republic of Korea (9.9%)
- UK (5.7%)
- Singapore (4.5%)
- India (4%)

## Commercial Information



# Construction materials (2 of 2)

## Sector commentary

- **No change to stability ratings**
- No reported concerns on supply chain impacts or product availability.
- 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.

## Product commentary

### Solvent (Toluene)

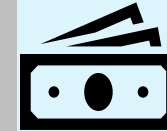
- By product of oil refining.
- Commercial Information

### Bitumen (Construction)

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

### Solvent (Toluene)

Free and frank opinions



**-2.7%** —

Price change since February  
**\$0.71**

Market price USD per kg



**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



**32.6%** ▲

Price change since February  
**\$650.5**

Market price USD per tonne



**TBC**

Estimated months of supply

#### Key supply partners:

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

Free and frank opinions

# Product Glossary

## Critical Chemicals

- **Plastics (Polyethylene/PE)** - New Zealand has no domestic production and has limited inventory resilience. Free and frank opinions  
We are continuing to monitor this product closely.
- **Petroleum based lubricant (engine oils, hydraulic oils, industrial grease)** - New Zealand is reliant on imported base products and limited domestic blending capability. These lubricants are essential for transport and industrial processes across the economy.
- **Helium** – Helium supports essential services including medical imaging, AI datacentres and advanced manufacturing. Global supply is limited, concentrated, and exposed to disruption risks.
- **Aluminium Sulphate** - A low-cost, water-soluble aluminium salt commonly used as a coagulant to remove dirt and impurities from water and wastewater treatment, which is the largest and most critical user group in New Zealand. It is manufactured domestically, but supply is reliant on inputs of imported goods.
- **Acetic Acid** - Critical to multiple sectors, especially in the treatment of water utilities, it is used for pH adjustment and neutralisation, which is essential to maintaining safe and compliant water services. New Zealand is fully import dependent for acetic acid Commercial Information
- **Sodium Hypochlorite** - Essential for water disinfection. Hazardous, difficult to transport and store. Limited ability to hold large inventories due to degradation over time.
- **Carbon Dioxide** - Mainly captured as a by-product of ammonia and hydrogen production rather than produced independently. As a result, supply is tightly linked to upstream plant operations and is vulnerable to outages, with imports used primarily as a short-term backup.
- **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.

## 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. Not manufactured in NZ. Widely used globally and used in paints and adhesives. Other petroleum solvents include xylene, naphtha, mineral spirits, etc.
- **Bitumen (Construction)** – By product of oil refining. No NZ manufacturing. Concentrated supply in Asia. Critical for transport network.
- **Adhesives** – Adhesives are polymer-based blends formulated to bond surfaces. Many adhesives have inputs derived from oil refining. Key uses are for packaging, labelling, and wood products. Many adhesives have inputs derived from oil refining (olefins, aromatics, polymer). No NZ production of petroleum inputs.
- **Resins** – By product of oil refining. No NZ manufacturer of petroleum precursors. Large number of uses including paint manufacture. Primarily as a binder for multiple applications.