Processed Fruit and Vegetables in New Zealand

November 2025

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Processed Fruit and Vegetables in New Zealand - Category analysis

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2025 DEVELOPMENTS

Affordability pressures and climate volatility drive a shift toward long-life and frozen formats

INDUSTRY PERFORMANCE

Households turn to processed formats as climate pressures and cost-conscious behaviour reshape purchasing patterns

Frozen fruit and vegetables gain traction as consumers embrace convenience, nutrition and reduced food waste

WHAT'S NEXT?

Consumers prioritise affordability and consistency as long-term drivers of processed produce uptake

Frozen formats strengthen their position as health, convenience and technology-enhanced nutrition drive adoption

Health and wellness priorities reinforce demand for nutrient-dense, minimally processed frozen produce

COMPETITIVE LANDSCAPE

Heinz Wattie strengthens category leadership through innovation and sustainability-focused production

Private label gains momentum as Foodstuffs expands its influence in a value-conscious market

CHANNELS

Supermarkets remain the core channel as private label expansion and price consciousness shape purchasing behaviour

Online distribution grows gradually as supermarket-led digital services expand accessibility

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Staple Foods in New Zealand - Industry Overview

EXECUTIVE SUMMARY

Economic pressures, shifting dietary priorities and evolving retail strategies shape performance in 2025

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INDUSTRY PERFORMANCE

Health, naturalness and sustainability reshape expectations of everyday staples

Retailers expand curated free-from and plant-forward assortments to support conscious shopping

Reassessment of plant-based credentials shifts focus from hype to authenticity and quality

WHAT'S NEXT?

Steady growth outlook supported by economic recovery, home-cooking habits and value-seeking behaviour

Innovation will centre on wellness, functionality and credible sustainability

Private label expansion and evolving retail strategies will reshape competition and channel dynamics

COMPETITIVE LANDSCAPE

Goodman Fielder reinforces leadership through portfolio breadth, health positioning and brand revitalisation

Foodstuffs capitalises on private label strength and value positioning amid cost-of-living pressures

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