



Cooking Ingredients and Meals in New Zealand

November 2025

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EXECUTIVE SUMMARY

Price-sensitivity persists, benefiting private label

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INDUSTRY PERFORMANCE

Health and wellness steer product development

Reformulation and transparency reshape sauces and condiments

From “quick fixes” to “fakeaways”

WHAT'S NEXT?

Moderate value growth amid cost and supply pressures

Health and wellness define long-term value

Market reform and digital retail transformation

COMPETITIVE LANDSCAPE

Heinz Wattie's maintains market leadership

Foodstuffs drives growth through Pams private label

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Supermarkets remain the dominant retail format

E-commerce emerges as the most dynamic channel

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Sales benefit from consumers buying a range of options

INDUSTRY PERFORMANCE

Volumes rebound while value edges higher on mix and renewed confidence

Olive oil dynamics highlight the importance of supply resilience and transparent pricing

WHAT'S NEXT?

Steady value growth shaped by wellness demand and more resilient sourcing

Health and wellness priorities elevate extra-virgin and high-heat choices

COMPETITIVE LANDSCAPE

Foodstuffs strengthens its lead by meeting value needs without dropping quality cues

William Aitken & Co stabilises premium olive with a quality-first, standards-led stance

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Sales benefit from price-sensitive consumers shifting from dining out to dining in

INDUSTRY PERFORMANCE

Convenience-focused products sustain growth amid household pressure

Meal kits struggle to recover as consumers seek value and variety

WHAT'S NEXT?

Moderate outlook shaped by investment and structural challenges

Health and wellness drive a shift toward balanced, functional meals

COMPETITIVE LANDSCAPE

My Food Bag remains a familiar name, though subscription fatigue weighs on performance

Woolworths invests in production and private label development to reinforce its leadership

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INDUSTRY PERFORMANCE

Home-cooking trends sustain demand for versatile and premium-quality sauces

Global cuisines and dietary inclusivity drive flavour innovation

WHAT'S NEXT?

Steady growth expected as cooking sophistication deepens

Health and wellness reshape consumer expectations and product reformulation

Policy debate and sustainability initiatives shape the long-term landscape

COMPETITIVE LANDSCAPE

Heinz Wattie's strengthens its leadership through depth and adaptability

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Honey benefits from healthy and natural image

INDUSTRY PERFORMANCE

Honey consolidates its leadership amid wellness and flavour trends

Chocolate, nut, and fruit spreads face cost pressures and evolving expectations

WHAT'S NEXT?

Outlook shaped by innovation, cost management, and global honey dynamics

Honey and functional spreads anchor the “better-for-you” evolution

COMPETITIVE LANDSCAPE

Heinz Wattie’s reinforces leadership through scale and everyday relevance

Comvita seeks stability through potential acquisition and strategic realignment

CHANNELS

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