



Staple Foods in New Zealand

November 2025

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Staple Foods in New Zealand

EXECUTIVE SUMMARY

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

KEY DATA FINDINGS

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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Supermarkets remain dominant but face mounting scrutiny and pressure for structural reform

E-commerce grows gradually as retailers refine delivery models and consumers weigh cost versus convenience

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Baked Goods in New Zealand

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Growing focus on health, affordability and cleaner formulations shapes overall market momentum

INDUSTRY PERFORMANCE

Health-aligned bread innovation supports steady category expansion despite muted volumes

Cocoa-driven cost inflation and reduced discretionary spending accelerate decline in cakes

WHAT'S NEXT?

Functional evolution and rising nutritional scrutiny reshape future category dynamics
Wellness preferences drive premiumisation and artisanal growth as eating-out declines persist
Private label expansion reinforces competition and shapes value-driven purchasing habits

COMPETITIVE LANDSCAPE

Goodman Fielder strengthens its leadership through health-driven innovation and HSR alignment
Breadcraft expands influence through functional flat bread and artisanal sourdough innovation

CHANNELS

Supermarkets dominate distribution while balancing convenience, health positioning and artisan appeal
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[Breakfast Cereals in New Zealand](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health redefinition, affordability pressures and evolving breakfast habits reshape overall category direction

INDUSTRY PERFORMANCE

Shift toward functional, allergy-friendly and cleaner-label cereals supports steady value expansion
Portfolio restructuring intensifies as manufacturers prioritise core brands and respond to changing breakfast routines

WHAT'S NEXT?

Functional innovation and nutritional repositioning expected to sustain category value despite modest volumes
Health and wellness positioning becomes central to innovation as demand rises for cleaner, nutrient-dense cereals
Regulatory debates around agricultural inputs highlight growing tensions between food safety assurance and sustainability goals

COMPETITIVE LANDSCAPE

Kellanova reinforces leadership through high-protein innovation and stronger health positioning
Sanitarium pivots toward core brands as demand for portable and functional breakfast formats accelerates

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Processed Fruit and Vegetables in New Zealand

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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

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumers shift toward healthier proteins while value-added innovation strengthens category resilience

INDUSTRY PERFORMANCE

Poultry and seafood gain momentum as consumers diversify protein choices

Convenience-led innovation drives growth in frozen poultry while sustainability commitments gain industry prominence

WHAT'S NEXT?

Health, sustainability and affordability reshape long-term protein choices

Heightened scrutiny prompts a shift toward cleaner, more transparent plant-based offerings

Technology, sustainability and premiumisation shape the next phase of value-added protein innovation

COMPETITIVE LANDSCAPE

Innovation, flavour partnerships and strategic expansion strengthen Hellers' leadership position

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CHANNELS

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[Rice, Pasta and Noodles in New Zealand](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Home cooking, value-seeking and multicultural eating underpin robust category growth

INDUSTRY PERFORMANCE

Home cooking and value polarisation support ongoing category expansion

Pasta outperforms as chilled formats and premium offerings gain visibility

WHAT'S NEXT?

Category set for continued expansion as pasta and rice lead forecast growth

Health-led innovation reshapes dried pasta and noodle offerings

Chilled pasta innovation broadens fresh, convenient meal solutions

COMPETITIVE LANDSCAPE

James Crisp leverages SunRice and demographic shifts to consolidate rice leadership

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