



**Euromonitor  
International**

# Processed Fruit and Vegetables in New Zealand

November 2025

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## Processed Fruit and Vegetables in New Zealand - Category analysis

### KEY DATA FINDINGS

#### 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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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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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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For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/processed-fruit-and-vegetables-in-new-zealand/report](http://www.euromonitor.com/processed-fruit-and-vegetables-in-new-zealand/report).