



**Euromonitor
International**

Processed Meat, Seafood and Alternatives To Meat in New Zealand

November 2025

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

Promotional intensity, brand expansion and convenience-led innovation support Inghams' growing market presence

CHANNELS

Supermarkets reinforce dominance as consumers seek convenience and value in everyday protein purchases

Online platforms expand through premium offerings despite modest overall penetration

CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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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

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

CHANNELS

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

MARKET DATA

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