

Snacks in New Zealand

June 2023

Table of Contents

Snacks in New Zealand

EXECUTIVE SUMMARY

Snacks in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for snacks?

MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2018-2023

Table 2 - Sales of Snacks by Category: Value 2018-2023

Table 3 - Sales of Snacks by Category: % Volume Growth 2018-2023

Table 4 - Sales of Snacks by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Snacks: % Value 2019-2023

Table 6 - LBN Brand Shares of Snacks: % Value 2020-2023

Table 7 - Penetration of Private Label by Category: % Value 2018-2023

Table 8 - Distribution of Snacks by Format: % Value 2018-2023

Table 9 - Forecast Sales of Snacks by Category: Volume 2023-2028

Table 10 - Forecast Sales of Snacks by Category: Value 2023-2028

Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in New Zealand

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressures drive value sales growth

Mars switches to paper-based wrappers

Countlines continue to perform well as New Zealand settles into post-COVID-19 life

PROSPECTS AND OPPORTUNITIES

Slower value growth expected as inflationary pressures ease

Strong NPD activity expected to drive category performance over the forecast period

Despite growth headwinds, countlines expected to be the strongest performer over the forecast period

CATEGORY DATA

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2018-2023

Table 14 - Sales of Chocolate Confectionery by Category: Value 2018-2023

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2018-2023

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2018-2023

Table 17 - Sales of Chocolate Tablets by Type: % Value 2018-2023

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2019-2023

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2020-2023

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2018-2023

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2023-2028

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2023-2028

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2023-2028

Gum in New Zealand

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressures drive value sales growth

Volume sales continue to decline

Chewing gum outperforms bubble gum

PROSPECTS AND OPPORTUNITIES

Slower value growth expected as inflationary pressures ease

Wrigley Co to continue to lead gum

Conscious consumerism likely to influence gum over the forecast period

CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2018-2023

Table 26 - Sales of Gum by Category: Value 2018-2023

Table 27 - Sales of Gum by Category: % Volume Growth 2018-2023

Table 28 - Sales of Gum by Category: % Value Growth 2018-2023

Table 29 - Sales of Gum by Flavour: Rankings 2018-2023

Table 30 - NBO Company Shares of Gum: % Value 2019-2023

Table 31 - LBN Brand Shares of Gum: % Value 2020-2023

Table 32 - Distribution of Gum by Format: % Value 2018-2023

Table 33 - Forecast Sales of Gum by Category: Volume 2023-2028

Table 34 - Forecast Sales of Gum by Category: Value 2023-2028

Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2023-2028

Table 36 - Forecast Sales of Gum by Category: % Value Growth 2023-2028

Sugar Confectionery in New Zealand

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressures drive value sales growth

Skittles launches new 'Pride' packaging

Liquorice bounces back after contamination scandal

PROSPECTS AND OPPORTUNITIES

Slower value growth expected as inflationary pressures ease

'Buy Local' offers growth opportunities for local manufacturers

Cost of living pressures to create opportunities for private label brands

CATEGORY DATA

Summary 2 - Other Sugar Confectionery by Product Type: 2023

Table 37 - Sales of Sugar Confectionery by Category: Volume 2018-2023

Table 38 - Sales of Sugar Confectionery by Category: Value 2018-2023

Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2018-2023

Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2018-2023

Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2018-2023

Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2019-2023

Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2020-2023

Table 44 - Distribution of Sugar Confectionery by Format: % Value 2018-2023

Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2023-2028

Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2023-2028

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2023-2028

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2023-2028

Ice Cream in New Zealand

KEY DATA FINDINGS

2023 DEVELOPMENTS

Warm weather drives growth in 2022, but rainy start dampens 2023

Supply chain disruptions and rising costs lead to Tip Top exit a number of brands

Plant-based ice cream emerges as standout performer

PROSPECTS AND OPPORTUNITIES

Slower value growth expected as inflationary pressures ease

Further range rotation expected from Froneri to stimulate sales

Strong growth expected from plant-based ice cream

CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2018-2023

Table 50 - Sales of Ice Cream by Category: Value 2018-2023

Table 51 - Sales of Ice Cream by Category: % Volume Growth 2018-2023

Table 52 - Sales of Ice Cream by Category: % Value Growth 2018-2023

Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2018-2023

Table 54 - Sales of Impulse Ice Cream by Format: % Value 2018-2023

Table 55 - NBO Company Shares of Ice Cream: % Value 2019-2023

Table 56 - LBN Brand Shares of Ice Cream: % Value 2020-2023

Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2019-2023

Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2020-2023

Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2019-2023

Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2020-2023

Table 61 - Distribution of Ice Cream by Format: % Value 2018-2023

Table 62 - Forecast Sales of Ice Cream by Category: Volume 2023-2028

Table 63 - Forecast Sales of Ice Cream by Category: Value 2023-2028

Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2023-2028

Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2023-2028

Savoury Snacks in New Zealand

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressures drive value sales growth in New Zealand

Work-from-home trends remain entrenched, benefits savoury snacks

Keto preferences fuel growth in meat snacks

PROSPECTS AND OPPORTUNITIES

Slower value growth expected as inflationary pressures ease

Cost of living pressures to create opportunities for private label brands

Limited editions with a cause to drive NPD activity

CATEGORY DATA

Summary 3 - Other Savoury Snacks by Product Type: 2023

Table 66 - Sales of Savoury Snacks by Category: Volume 2018-2023
 Table 67 - Sales of Savoury Snacks by Category: Value 2018-2023
 Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2018-2023
 Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2018-2023
 Table 70 - NBO Company Shares of Savoury Snacks: % Value 2019-2023
 Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2020-2023
 Table 72 - Distribution of Savoury Snacks by Format: % Value 2018-2023
 Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2023-2028
 Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2023-2028
 Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2023-2028
 Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2023-2028

Sweet Biscuits, Snack Bars and Fruit Snacks in New Zealand

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflationary pressures drive value sales growth
 Increasing health and wellness concerns drive stand-out performance in protein/energy bars
 Work-from-home trends remain entrenched, benefiting snacks

PROSPECTS AND OPPORTUNITIES

Slower value growth expected as inflationary pressures ease
 Limited editions with a cause to characterise NPD activity
 Sugar-free options to feature more heavily

CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2018-2023
 Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2018-2023
 Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2018-2023
 Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2018-2023
 Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2019-2023
 Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2023
 Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2019-2023
 Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2020-2023
 Table 85 - NBO Company Shares of Snack Bars: % Value 2019-2023
 Table 86 - LBN Brand Shares of Snack Bars: % Value 2020-2023
 Table 87 - NBO Company Shares of Fruit Snacks: % Value 2019-2023
 Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2020-2023
 Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2018-2023
 Table 90 - Distribution of Sweet Biscuits by Format: % Value 2018-2023
 Table 91 - Distribution of Snack Bars by Format: % Value 2018-2023
 Table 92 - Distribution of Fruit Snacks by Format: % Value 2018-2023
 Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2023-2028
 Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2023-2028
 Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2023-2028
 Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/snacks-in-new-zealand/report.