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Prepared By: Ana Popovich

Approved By: Lazaro Sandoval

Report Highlights:

New Zealand continues to be an important market for U.S. agricultural exports. In 2025, New Zealand's imports of United States agricultural and related products rose by 22 percent (\$114 million) compared to 2024 to a record \$626 million. Despite its relatively small population, the country is an important premium market for United States agriculture including dairy, pork, distillers dried grains, and soybean meal. New Zealand is also a key market for consumer-oriented products, including grocery products such as prepared foods, fresh fruit, and pet food. Overall, New Zealand continues to present valuable opportunities for U.S. exporters.

Executive Summary:

New Zealand is an upper middle-income country with a GDP per capita of US\$49,000. In 2025, New Zealand's GDP reached US\$263 billion, making it the 51st largest economy in the world. The country is the world's 15th-largest agricultural exporter by value and the second-largest dairy exporter.

Consumer-Oriented Agricultural Imports:

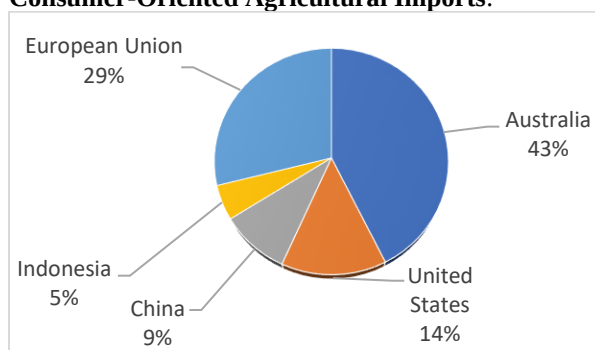


Chart 1: Top Exporting Countries to New Zealand 2025

Food Retail Industry:

New Zealand's food retail market is dominated by a duopoly. Sales reached just over US\$17 billion in 2024. The two largest retailers, Foodstuffs and Woolworths, represent just over 80 percent of total retail revenues.

Food Processing Industry:

New Zealand's sophisticated food, beverage, and grocery manufacturing industries accounts for almost one-third of New Zealand's manufacturing sector. New Zealand's fruit and vegetable industry is comprised of 136 registered businesses, which employ an average of 30 employees each. Consumers are actively seeking fresh produce for healthy living reasons.

Food Service Industry:

New Zealand's foodservice sector continued to recover in 2025 despite constrained household discretionary spending. Consumers increasingly favor high-quality, healthier, and experience-driven dining options, benefiting innovative restaurants and cafés. Meanwhile, growing demand for online ordering and takeaway delivery continues to support quick-service and value-oriented operators.

Quick Facts CY 2025

Imports of Consumer-Oriented Products (US \$million)

US\$ 5.96 billion – Agricultural Products
US\$ 3.7 billion – Consumer Food Products

List of Top 10 Growth Products in New Zealand

- | | |
|----------------------|-------------------------------------|
| 1) Food preparations | 2) Pet food |
| 3) Pork | 4) Bread and Confectionary Products |
| 5) Coffee | 6) Sauces & seasonings |
| 7) Wine | 8) Bananas |
| 9) Grapes | 10) Chocolate and Cocoa Products |

Food Industry by Channels (U.S. billion)

Retail Food Industry	\$17
Food Service-HRI	\$13
Food and Agriculture Exports	\$91

Top 10 New Zealand Retailers

- | | |
|-----------------------------|----------------------------|
| 1) New World (Foodstuffs) | 2) Pak n Save (Foodstuffs) |
| 3) Woolworths NZ | 4) The Warehouse |
| 5) Four Square (Foodstuffs) | 6) Super Value |
| 7) Fresh Choice | |

GDP/Population

Population (millions): 5.3
GDP (billions USD): \$263
GDP per capita (USD): \$49,000

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
- Minimum barriers to trade including low tariffs ranging from 0-5%.	- Strict border regulations on fresh produce. - High transportation costs due to long distance from United States.
Opportunities	Threats
- Strong consumer demand for value, high-quality products. - Produce from the United States is counter-seasonal. - Transportation costs are decreasing back to pre-COVID levels.	- High competition from neighboring countries e.g. Australia. - New Zealand favors purchasing from Trans-Pacific Partnership as a member nation.

Section I: Market Overview

New Zealand and the United States continue to maintain a strong agricultural trade relationship. New Zealand’s imports of consumer-oriented and agricultural-related products have generally trended upward since 2010, with import demand recovering after a temporary slowdown in 2023 that followed elevated inflation and cost-of-living pressures. By 2025, imports had resumed moderate growth as consumer spending stabilized and food manufacturing demand strengthened. The United States is New Zealand’s second-largest agricultural trading partner after China followed by Australia, the European Union, and Japan. Key U.S. agricultural exports to New Zealand are prepared foods, dairy products, distiller’s dried grains for animal feed, pet food, corn, whiskey, pork, and fresh fruit products, all of which maintained significant market share in New Zealand throughout 2025. Ongoing trade cooperation and easing tariff pressures on selected agricultural products further supported bilateral agricultural trade growth during 2025.

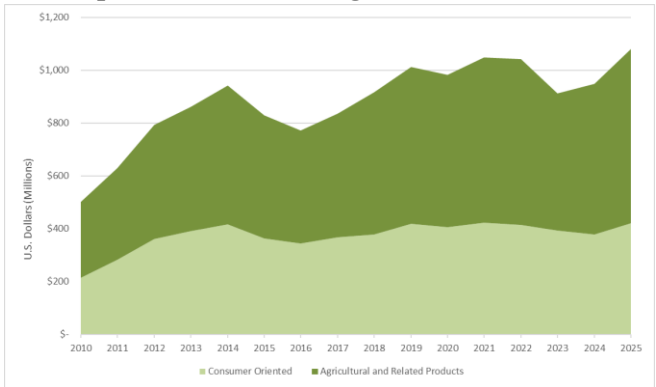
Table 1: New Zealand Economic Indicators 2020-2025

	2020	2021	2022	2023	2024	2025
Population	5.1 million	5.1 million	5.2 million	5.2 million	5.4 million	5.3 million
GDP (per capita \$USD)	41,791	44,509	45,686	47,056	48,280	49,000
Minimum wage (\$USD)	\$14.30	\$13.53	\$14.02	\$14.34	\$13.48	\$14.02
Consumer Price Inflation	1.4	5.9	7.2	5.2	2.92	3.1
Food Price Inflation	2.5	4.5	7.4	9.6	3.7	4.7

Source: Statistics New Zealand

New Zealand consumers continued to maintain relatively high disposable incomes compared to many OECD markets, although household spending is heavily impacted by elevated living costs and cautious consumer sentiment. Food expenditure accounted for roughly one-fifth of household spending, with consumers increasingly prioritizing value, convenience, and health-oriented products. Longer working hours, urban lifestyles, and continued demand for easy meal solutions supported growth in convenience foods, ready-to-eat meals, and premium private-label offerings. At the same time, consumers showed stronger interest in products with functional health benefits, high protein content, and sustainable or locally sourced ingredients. The dry and packaged foods segment remained the largest supermarket category by revenue, driven by strong demand for ready meals, condiments, edible oils and fats, canned and frozen foods, tea and coffee, confectionery, and snack foods, reflecting New Zealand’s continued shift toward convenience-focused and at-home consumption patterns.

Figure 1: New Zealand Imports of Food and Agricultural Products from the United States



Source: Trade Data Monitor LLC

Table 2: New Zealand's Ranking for U.S. Exports

Product	U.S ranking of imports	Value (US\$ million)
Dairy Products	2	\$120
Food preparations	4	\$58
Fresh fruit	3	\$37
Pork and pork products	4	\$34
Tree nuts	3	\$20
Distilled spirits	4	\$20
Pet food	4	\$20
Meat products	4	\$17
Processed fruit	3	\$14

Source: Trade Data Monitor LLC

Table 3: Top Countries Exporting Consumer-Oriented Agricultural Products to New Zealand 2025

Ranking	Country	Value (\$USD millions)	Share of total NZ imports	Top imported consumer-oriented products
1	Australia	\$1.285	32%	Food preparations, pet food, bread, non-alcoholic beverages, cocoa, wine, sauces
2	European Union	\$909	22%	Pork, food preparations, sparkling wine, lactose, chocolate, whey, pet food, cheese, wine, breads
3	United States	\$421	11%	Food preparations, lactose, pork, pet food, whiskey, grapes, non-alcoholic beverages, tomatoes, nuts
4	China	\$410	7%	Food preparations, beer, confectionary, breads, cocoa, sauces, pastas, frozen vegetables
5	Thailand	\$184	4%	Pet food, breads, sauces, pastas, food preparations, fruit & vegetable juice, confectionary, ginger, sweet corn
6	Indonesia	\$183	4%	Pet food, breads, sauces, pastas, food preparations, fruit & vegetable juice, confectionary, ginger, sweet corn

Source: Trade Data Monitor, LLC

Recent and Ongoing Trends

Healthy and Trendy

Although discretionary incomes remained under pressure through 2025 due to lingering cost-of-living concerns, New Zealand consumers continued to prioritize health-conscious food purchases and premium products with clear functional benefits. Demand has increased for foods perceived as supporting immunity, gut health, energy, and overall wellness, particularly products with high-protein content, reduced sugar, and natural ingredients. High-protein snacks, protein-enriched dairy products, functional beverages, and fermented foods such as kimchi, kombucha, and yogurt-based products have gained popularity among both younger and health-focused consumers. Consumers are also increasingly interested in clean-label products, plant-based alternatives, and foods with sustainable sourcing claims.

Reduced Alcohol Consumption

Growing health awareness and changing social habits continued to reduce overall alcohol consumption in New Zealand through the end of 2025. Consumers increasingly favored moderation, with stronger demand for low- and no-alcohol beverages, functional drinks, and premium non-alcoholic alternatives. While total alcohol consumption declining on a per capita basis, premiumization is a rising, dominant trend, particularly in spirits, craft beverages, and wine. Consumers increasingly prefer smaller quantities of higher-quality products and showed growing interest in products with unique flavors, provenance, and sustainability credentials.

Ethnic Foods and Diversified Staples

New Zealand consumers remain highly receptive to international cuisines and flavors, supported by the country's multicultural population and strong overseas travel connections. Demand for authentic and fusion-style foods continued to expand in 2025, with Sri Lankan, Japanese, Korean, Southeast Asian, Middle Eastern, pan-African, and Latin American cuisines all gaining popularity. In addition to prepared ethnic meals and sauces, consumers are increasingly purchasing diversified staple ingredients and tropical products for home cooking and wellness-focused consumption. Imports of products such as jackfruit, coconut water, specialty rice varieties, noodles, chili sauces, and other tropical fruits have continued to grow as consumers seek new flavors, plant-based meal options, and convenient functional beverages. Coconut water, in particular, has benefited from rising demand for natural hydration products, while jackfruit has gained attention as both a meat alternative and versatile ingredient in ethnic cuisine.

Table 4: Advantages and Challenges Exporting to New Zealand

ADVANTAGES	CHALLENGES
High Consumer Confidence: New Zealanders view U.S. food and beverage products as premium, innovative, and safe, often following U.S. food trends closely.	Fierce Regional Competition: U.S. products face strong, proximate competition from Australia, as well as heavily established markets in Asia and the European Union.
Counter-Seasonal Production: U.S. fresh produce e.g. grapes and citrus, hits the market during the New Zealand off-season, filling supply gaps when domestic or Australian products are unavailable.	Strict Biosecurity Controls: New Zealand enforces incredibly strict sanitary and phytosanitary regulations. U.S. exporters must closely coordinate with local partners to ensure compliance, which can delay entry for fresh produce and meats.
Joint labelling standards: New Zealand and Australia share food labelling standards. Meaning a product can be labelled for both countries with ease.	Logistical Costs & Distance: High global shipping costs and long transit times mean shipments are often smaller, making it harder to establish cost-effective supply chains.
Ease of doing business and size of market make it a good fit for new-to-export and small-to-medium U.S. companies.	Consolidated Retail Market: The New Zealand grocery retail sector is heavily dominated by just two major chains (Foodstuffs and Woolworths), which can make securing shelf space exceptionally difficult for new or smaller U.S. brands.

Section II: Exporter Business Tips

Market Research

New Zealand remains a mature, highly developed, and competitive food and beverage market. Building strong relationships with local importers, distributors, and retail buyers continues to be critical for successful market entry and long-term growth. Importers typically prefer suppliers that can provide reliable supply chains, flexible logistics, and consistent product quality.

Shipping and logistics costs remain an important consideration for exporters due to New Zealand's geographic isolation and relatively small market size. Global freight conditions improved compared to the disruptions experienced during the COVID-19 years, transportation and distribution costs continue to significantly influence landed prices. U.S. exporters are encouraged to work closely with freight forwarders, customs brokers, and experienced import partners when evaluating market opportunities.

Counter-seasonal U.S. fresh produce continues to complement domestic supply, particularly during New Zealand’s winter months from June through August. Imported fresh fruit products that offer quality, consistency, and seasonal availability remain attractive to retailers and consumers.

Products that combine premium quality, innovation, convenience, and sustainability tend to perform well in New Zealand. Environmentally friendly packaging, recyclable materials, reduced plastic usage, and products with strong sustainability messaging continue to resonate strongly with retailers and consumers.

Local Business Customs and Trends

While digital communication and virtual meetings are widely used, New Zealand businesses continue to value personal relationships, responsiveness, and face-to-face engagement. Trade visits, in-market promotions, and participation in industry events remain important for establishing trust and long-term commercial partnerships.

See the 2026/27 New Zealand Trade Show Schedule in Appendix IV

General Consumer Tastes and Trends

Health and wellness trends continued to strengthen through 2025. Consumers are increasingly seeking products with high-protein content, functional health benefits, reduced sugar, natural ingredients, and clean-label claims. Supermarkets continue expanding their dedicated health and wellness sections, including products focused on gut health, sports nutrition, plant-based alternatives, and premium functional beverages. Consumers are often willing to pay premium prices for products perceived as healthier, sustainable, or ethically sourced.

Convenience remains a major purchasing driver, particularly among urban consumers and dual-income households. Demand for ready-to-eat meals, snack foods, meal kits, frozen convenience products, and easy-to-prepare international foods has continued to grow.

New Zealand consumers are increasingly interested in globally inspired foods and diversified pantry staples. Demand has grown for authentic international flavors, specialty sauces, tropical products, and ingredients associated with Asian, Middle Eastern, African, and Latin American cuisines. Products such as coconut water, jackfruit, specialty noodles, and international condiments have benefited from growing consumer interest in wellness, convenience, and multicultural food experiences.

Section III: Import Food Standards, Regulations and Import Procedures

Customs Clearance

All imported products entering New Zealand must be cleared through the New Zealand Customs Service and comply with the country’s strict biosecurity and food safety requirements. Exporters should review New Zealand’s [prohibited and restricted imports list](#) before shipping products to determine whether goods are permitted entry or require additional permits, approvals, or inspections.

The Ministry for Primary Industries (MPI) is the primary government agency responsible for regulating imported food and overseeing biosecurity matters, including the prevention of pests and diseases entering New Zealand. Many food and agricultural imports must comply with an Import Health Standard (IHS), which outlines the specific biosecurity requirements products must meet before entry is permitted. Information on import health standards for specific products can be found [here](#).

The Food Act 2014 aims to provide an efficient, effective, risk-based food regulatory regime to manage food safety and suitability issues, improve business certainty, and minimize compliance costs for businesses. The Food Act 2014 can be found online [here](#).

Due to the complexity of import procedures and biosecurity requirements, U.S. exporters are strongly encouraged to work with experienced customs brokers, freight forwarders, and New Zealand importers familiar with MPI and Customs clearance procedures.

New Zealand customs importing requirements can be found [here](#).

Documents Generally Required by the Country Authority for Imported Food

Documentation requirements vary depending on the product category and risk profile, but imported food products commonly require:

- Commercial invoice
- Bill of landing or airway bill
- Packing list
- Import permits or approvals (where applicable)
- Phytosanitary or sanitary certificates for regulated agricultural products
- Certificates of origin (when required)
- Product ingredient and formulation information
- Labeling documentation demonstrating compliance with New Zealand food standards

Certain food and agricultural products may also require additional MPI documentation or inspection upon arrival. Products classified as high-risk may be subject to increased scrutiny under New Zealand's biosecurity system.

The Food Standards Australia New Zealand (FSANZ) establishes the food standards governing food composition, labeling, contaminants, and microbiological limits for foods sold in both New Zealand and Australia.

Country Language Labeling Requirements

Food labeling requirements in New Zealand are regulated under the Australia New Zealand Food Standards Code administered by Food Standards Australia New Zealand ([FSANZ](#)). Labels must generally be provided in English and include mandatory information such as:

1. Product name or description
2. Ingredient list
3. Allergen declarations
4. Nutritional information panel
5. Country of origin information where required
6. Name and address of the importer or distributor
7. Date marking and storage instructions
8. Net contents

Claims relating to health, nutrition, or functional benefits must comply with FSANZ regulations and supporting standards. Exporters should work closely with local importers or regulatory specialists to ensure labels meet all applicable New Zealand requirements before products are shipped.

Tariffs and FTAs

New Zealand has a relatively open trading environment with generally low tariff barriers for many imported food and agricultural products. The country participates in multiple bilateral and regional trade agreements that support trade liberalization and reduce commercial barriers.

New Zealand has free trade agreements with several countries and trading blocs, including China, South Korea, the United Kingdom, members of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), and the Regional Comprehensive Economic Partnership (RCEP).

The United States and New Zealand maintain a Trade and Investment Framework Agreement (TIFA), which supports ongoing dialogue and cooperation on trade and investment matters. Although the two countries do not currently have a bilateral free trade agreement, agricultural trade between the United States and New Zealand remains strong, fairly open, and continues to expand in several value-added product categories.

The following agreements and frameworks also influence food trade regulations and market access:

1. Joint Food Standards Treaty between Australia and New Zealand
2. Trans-Tasman Mutual Recognition Arrangement (TTMRA)
3. World Trade Organization (WTO) agreements, including Sanitary and Phytosanitary (SPS) measures
4. Trademarks and Patents Market Research

Learn more about the New Zealand importing requirements [here](#).

The Intellectual Property Office of New Zealand ([IPONZ](#)) administers trademarks, patents, designs, and intellectual property protections in New Zealand. U.S. exporters are encouraged to register trademarks and protect intellectual property before entering the market, particularly for branded consumer products and proprietary packaging designs.

Additional information on intellectual property protections, trademark registration procedures, and patent requirements is available through the IPONZ website. Exporters seeking detailed information on food import regulations and standards should also consult the latest New Zealand FAIRS Report published by the USDA Foreign Agricultural Service.

More information about the food regulations in New Zealand can be found in the recent [2025 FAIRS Report](#).

Section IV: Market Sector Structure and Trends

Post-COVID Market Ramifications

COVID-19 permanently altered supply chain expectations in New Zealand's grocery sector:

- Greater emphasis on supply chain resilience and diversified sourcing
- Higher inventory holding requirements to avoid stockouts
- Increased reliance on regional distribution hubs

- More stringent supplier onboarding for e-commerce readiness

For U.S. exporters, this means stronger opportunities for suppliers that can guarantee continuity, flexible fulfillment, and reliable lead times—especially in categories where New Zealand remains import-dependent.

Market Aspect	Pre-COVID	Post-COVID / Current Trend
Online grocery adoption	Low–moderate	High and still growing
Retail logistics model	Store-centric	Hybrid (stores & fulfillment centers)
Inventory strategy	Just-in-time	Higher buffer & warehousing expansion
Brand competition	Premium vs mainstream	Rising private-label share

Sector Trends

Online shopping continues to expand rapidly in New Zealand’s grocery and broader retail sectors, reshaping distribution, infrastructure, and competitive dynamics. The COVID-19 pandemic accelerated adoption of e-commerce across food and household goods, and much of that behavioral shift has persisted. Both major supermarket groups, Foodstuffs and Woolworths, have significantly scaled their online grocery capabilities over the past three years. Woolworths, in particular, has invested in dedicated distribution-only facilities to support fulfillment of online orders, while Foodstuffs has upgraded store-based picking and delivery systems.

Industry experts expect continued growth in warehousing and “last-mile” logistics infrastructure as online grocery penetration increases. For U.S. exporters, this has two implications: (1) improved access to centralized distribution channels and (2) higher expectations for packaging efficiency, shelf stability, and fulfillment readiness.

In depth information on the retail food industry in New Zealand can be found in the FAS/Wellington Retail Foods GAIN report [here](#).

Inflation and Consumer Behavior

New Zealand has experienced elevated inflation in recent years (particularly food and housing-related costs), which has influenced grocery purchasing behavior. Consumers have become more price-sensitive, trading down from premium imported brands toward value-oriented offerings and private-label alternatives. This shift is especially relevant for U.S. exporters positioned in mid- to premium-tier categories, where price justification and differentiation are increasingly important.

As a result, supermarket loyalty is weakening in favor of basket optimization, i.e. consumers are increasingly choosing based on promotions and unit pricing rather than brand loyalty.

Private Label Expansion

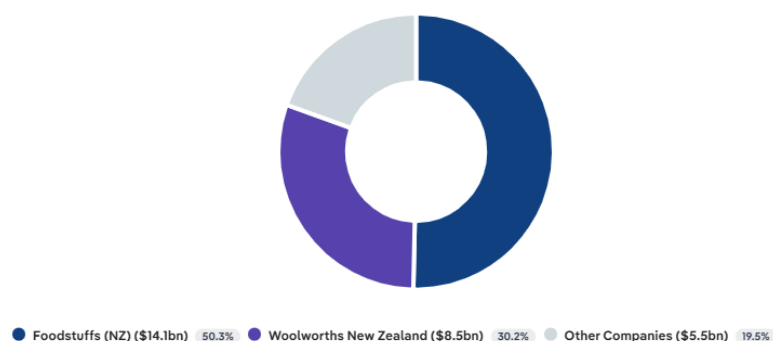
Private-label growth is one of the most significant structural trends in the New Zealand retail food sector. Both Foodstuffs and Woolworths have expanded their own-brand portfolios across nearly all categories, including packaged foods, beverages, and household staples.

Key private-label brands include:

- Pams (Foodstuffs)
- Woolworths (Woolworths Group)
- Natural Beverage Company

Retailers report that private-label products can deliver materially higher margins (often cited in the 8-10% range or higher depending on category), which is driving continued shelf space reallocation away from imported branded goods in commoditized categories.

Figure 2: Supermarket Market Share in New Zealand



Source: ibisworld.com

Best consumer-oriented product prospects

Several demand-side trends are shaping future import opportunities:

- **Plant-based and health-driven consumption:** Growth in plant-based proteins, functional foods, high-protein, and “better-for-you” products continues, although price sensitivity is slowing premium adoption.
- **E-commerce-first product design:** Products optimized for shipping (durability, smaller pack sizes, longer use-by dates, reduced breakage risk) are increasingly favored.
- **Private-label pressure:** Retailers are actively substituting branded imports with in-house alternatives where feasible.
- **Convenience and prepared foods:** Demand is rising for ready-to-eat and easy-prep meals, particularly in urban areas.

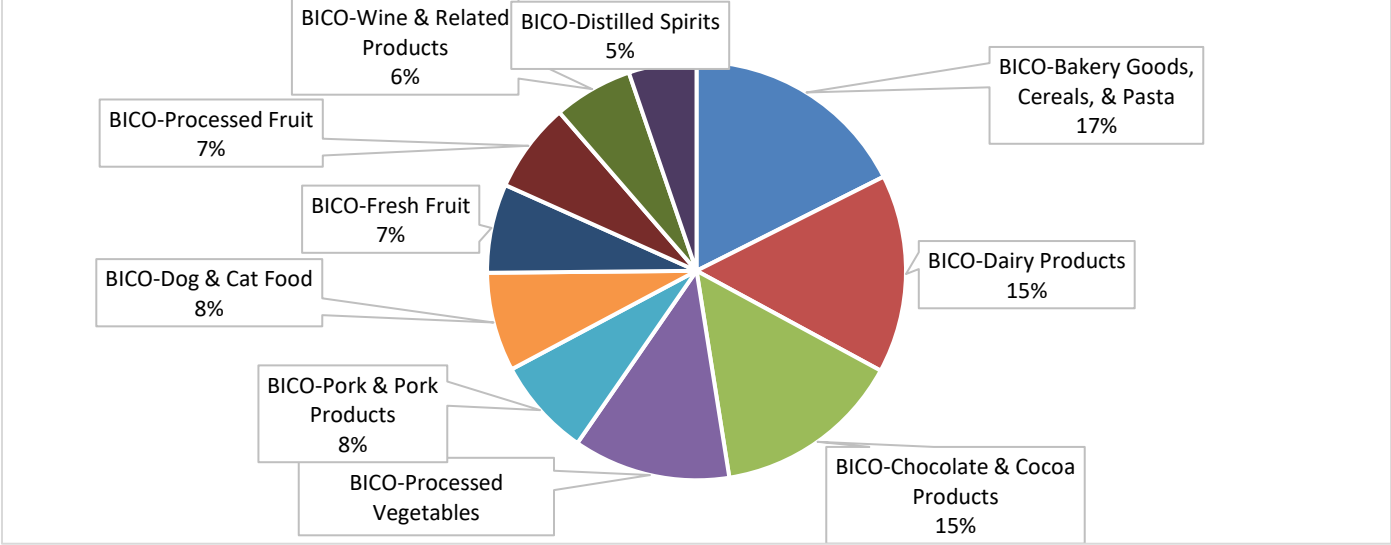
Overall, the New Zealand grocery market is becoming more consolidated, more price-driven, and more logistics-intensive, creating both challenges and targeted opportunities for U.S. exporters who can align with retailer priorities around efficiency, value, and supply reliability.

See Appendix II for a one-page overview of the New Zealand food retail market.

Section V: Agricultural and Food Imports

In 2025, New Zealand imported a total of US\$347 million worth of consumer-oriented products. Figure 3 highlights the strongest product categories for food and agricultural exports to New Zealand and confirms that U.S. exporters should prioritize value-added consumer food products with strong retail demand. The largest category is bakery goods, cereals, and pasta (17%), followed closely by dairy products (15%) and chocolate and cocoa products (15%), indicating sustained demand for packaged and convenience-oriented foods. Processed vegetables (12%) also represent a significant opportunity, reflecting New Zealand consumers’ preference for easy-to-prepare and shelf-stable products. Mid-sized categories such as pork and pork products (8%), dog and cat food (8%), fresh fruit (7%), and processed fruit (7%) demonstrate continued opportunities in premium protein, pet food, and healthy snack segments. Smaller but still relevant categories include wine and related products (6%) and distilled spirits (5%), which benefit from growing consumer interest in premium and imported beverages.

Figure 3: Top 10 Imports from World of Consumer-Oriented Agricultural Products by Total Value



Source: Trade Data Monitor LLC

See Appendix V for agricultural and food statistics.

Section VI: Key Contacts and Further Information

Name	Function
Ministry of Primary Industries (MPI)	Governing body of exports and primary sector
Import Health Standards (IHS)	Outlines biosecurity requirements
NZ Customs Service	Governing body for protecting New Zealand’s borders
Food Standards Australia New Zealand (FSANZ)	Governing code for food regulation
NZ Wine	Unified national winegrowers industry body
NZ Restaurant Association	Membership based association for New Zealand hospitality
NZ Working Tariff Document	Document outlining New Zealand tariff structure

Agricultural Affairs Office 29 Fitzherbert Terrace, Thorndon, Wellington, 6011, New Zealand http://www.fas.usda.gov	Phone: +64 (04) 462 6030 Email: AGWellington@fas.usda.gov
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Appendix I: BICO Report - New Zealand Imports from the United States Over the Past Five Years



U.S. Imports of Agricultural & Related Products from *New Zealand(*)
CY 2021 - 2025 and Year-to-Date Comparisons
(in millions of dollars+)



Import Supplier: *New Zealand(*)*

Product	Calendar Years (Jan-Dec)					January - April Comparisons		
	2021	2022	2023	2024	2025	2025	2026	%Chg
Bulk Total.....	5.0	6.6	9.5	8.4	8.7	2.2	2.4	9.8
Wheat.....	0.0	0.4	1.4	0.3	0.0	0.0	0.0	-
Coarse Grains.....	0.0	0.0	0.1	0.3	0.2	0.1	0.0	-
Coffee, Unroasted.....	0.0	0.1	0.3	0.0	0.0	0.0	0.0	-
Tea.....	0.0	0.0	0.1	0.7	0.7	0.2	0.2	30.4
Pulses.....	4.0	5.5	6.6	6.3	7.1	1.7	1.7	-0.1
Oilseeds.....	0.0	0.3	0.8	0.2	0.3	0.2	0.4	143.3
Other Bulk Commodities.....	0.0	0.4	0.3	0.5	0.4	0.1	0.1	5.5
Intermediate Total.....	295.0	441.2	447.4	331.2	343.7	116.6	82.8	-29.0
Live Animals.....	8.0	1.4	2.8	2.7	3.1	2.5	0.3	-88.1
Other Livestock Products.....	140.0	245.1	274.4	204.4	209.5	84.0	43.7	-48.0
Other Feeds and Grain Products...	27.0	28.3	27.2	17.4	13.8	0.9	2.5	190.0
Vegetable Oils.....	0.0	1.1	0.1	0.9	0.7	0.2	0.2	19.6
Planting Seeds.....	15.0	22.1	24.3	27.2	20.7	4.9	4.3	-13.9
Sugars, Sweeteners, Bev. Bases	62.0	60.5	50.5	56.8	77.6	19.0	24.9	30.9
Essential Oils.....	1.0	1.3	1.3	1.4	0.4	0.1	0.1	56.3
Cocoa Paste & Cocoa Butter.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Dextrins, Peptones, & Proteins.....	42.0	78.7	66.1	19.2	15.5	4.7	6.1	29.7
Yeast & Baking Powder.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Intermediate Products.....	1.0	2.7	0.6	1.2	2.5	0.3	0.8	148.5
Consumer-Oriented.....	2,753.0	2,963.3	2,945.6	3,271.3	3,319.3	1,220.6	1,336.8	9.5
Beef & Beef Products.....	1,036.0	936.9	1,037.1	1,190.7	1,318.8	562.9	628.8	11.7
Other Meat Products.....	357.0	448.0	382.0	431.2	455.5	154.1	170.9	10.9
Poultry Products and Eggs.....	8.0	5.3	2.6	4.9	5.3	1.3	1.0	-28.0
Dairy Products.....	531.0	690.9	646.5	764.9	720.0	253.0	273.1	7.9
Fresh Fruit - Avocados.....	0.0	0.0	0.0	0.3	0.6	0.0	0.0	-
Fresh Fruit - Berries.....	0.0	0.0	0.6	1.2	1.9	1.9	2.1	12.2
Fresh Fruit - Other.....	152.0	170.2	155.3	195.5	229.4	29.7	41.7	40.7
Fresh Vegetables.....	2.0	0.1	0.0	5.3	0.8	0.5	0.2	-61.1
Processed Fruit & Vegetables.....	9.0	9.9	6.6	6.6	12.8	3.8	4.7	24.8
Fruit & Vegetable Juices.....	7.0	7.5	3.6	11.8	10.7	2.1	1.6	-26.8
Tree Nuts.....	1.0	0.1	0.4	0.8	0.9	0.3	0.2	-27.7
Wine & Related Products.....	551.0	584.0	595.8	515.9	471.6	182.6	178.1	-2.5
Beer.....	2.0	1.4	0.5	0.7	0.9	0.3	0.1	-53.2
Distilled Spirits.....	8.0	10.2	5.5	7.7	7.5	2.7	1.9	-31.2
Non-Alcoholic Bev. (excl. juice)....	6.0	9.5	10.5	16.7	12.1	2.7	2.4	-9.0
Nursery Products & Cut Flowers...	8.0	7.6	6.9	4.7	6.0	0.4	0.4	2.6
Roasted & Instant Coffee.....	0.0	0.3	0.3	0.2	0.8	0.1	0.3	304.6
Spices.....	0.0	0.0	0.0	0.0	0.0	0.0	0.1	2178.6
Chocolate & Cocoa Products.....	2.0	3.3	3.4	1.3	2.3	0.3	0.8	128.0
Condiments & Sauces.....	0.0	0.2	0.2	0.2	0.1	0.0	0.1	672.9
Baked Goods, Cereals, & Pasta....	1.0	0.5	0.5	0.8	0.4	0.2	0.3	31.8
Food Preparations.....	14.0	13.7	16.2	24.5	10.4	2.4	3.0	28.5
Dog & Cat Food.....	50.0	54.4	58.0	75.4	41.5	17.5	21.5	23.3
Mfg. Tobacco.....	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-
Other Consumer Oriented.....	10.0	9.6	12.8	10.2	9.0	1.8	3.6	96.5
Agricultural & Related.....	424.0	466.9	462.6	449.9	466.1	160.1	132.5	-17.2
Forest Products.....	210.0	253.2	225.8	224.1	241.5	80.3	71.8	-10.5
Seafood Products.....	214.0	213.6	236.9	225.8	224.6	79.8	60.7	-24.0
Agricultural Products.....	3,054.0	3,411.1	3,402.5	3,611.0	3,671.7	1,339.3	1,422.0	6.2
Agricultural & Related Products.....	3,478.0	3,877.9	3,865.1	4,060.9	4,137.7	1,499.4	1,554.5	3.7

Prepared By: Trade & Economic Analysis Division/GMA/FAS/USDA

Source: U.S. Census Bureau Trade Data

* Denote Highest Import Levels Since at

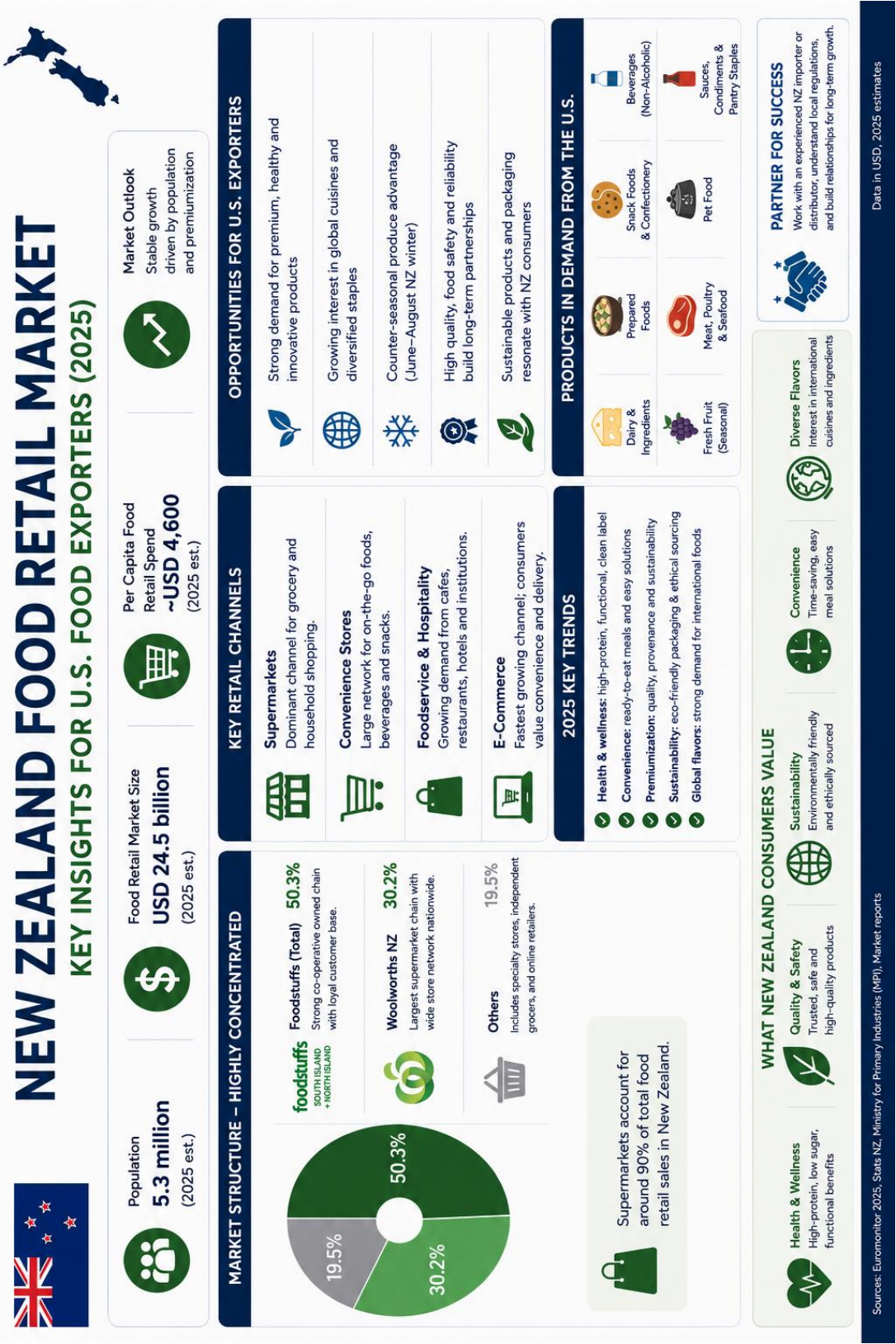
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GATSHelp@fas.usda.gov

Biodiesel aggregate includes only higher-level and pure biodiesel HTS chapter 38 codes; biodiesel blends below 30% by volume (aka. petroleum oils containing biodiesel) found in chapter 27 are excluded.

Appendix II: New Zealand Food Retail Market Snapshot



Appendix III: Market Entry Strategy

Market Entry Strategy

New Zealand remains an attractive and transparent market for U.S. food and agricultural exporters due to its stable regulatory environment, high consumer purchasing power, and strong demand for imported specialty and value-added products. Imported goods must comply with all applicable New Zealand laws, regulations, and food standards, including labeling, packaging, biosecurity, and sanitary and phytosanitary requirements. Food imports are regulated by New Zealand's Ministry for Primary Industries (MPI), which oversees import eligibility, food safety standards, and border clearance procedures.

U.S. exporters are encouraged to work closely with an experienced New Zealand importer, distributor, or customs broker familiar with MPI requirements and local retail channels. Partnering with an established distributor can significantly simplify market entry by assisting with import permits, product registration, labeling compliance, logistics, and retailer engagement. This is especially important for small- and medium-sized exporters that may not have dedicated in-market representation.

New Zealand consumers continue to show strong demand for premium, health-oriented, convenient, and internationally inspired food products. Opportunities for U.S. exporters remain strong in categories such as prepared foods, functional beverages, high-protein snacks, pet food, specialty dairy ingredients, alcoholic beverages, fresh fruit, sauces and condiments, and plant-based products. Products with clean-label claims, sustainable sourcing, and innovative packaging are also increasingly well received by retailers and consumers.

The USDA Foreign Agricultural Service (FAS) in Wellington provides market intelligence, importer referrals, and promotional support for U.S. exporters seeking opportunities in New Zealand. U.S. companies should also consider leveraging the services offered by the State Regional Trade Groups (SRTGs), which provide export assistance, market development programs, and cost-share opportunities for eligible exporters. These organizations include:

- Western U.S. Agricultural Trade Association ([WUSATA](#))
- Southern U.S. Trade Association ([SUSTA](#))
- Food Export-Midwest ([Food Export](#))
- Food Export-Northeast ([Food Export](#))

Another valuable resource for exporters entering the New Zealand market is the bi-annually published Food and Agricultural Import Regulations and Standards (FAIRS) Report, which provides detailed information on import procedures, labeling requirements, and food regulations.

Appendix IV

2026/27 New Zealand Trade Show Schedule

U.S. exporters interested in developing business relationships and increasing brand visibility in New Zealand should consider participating in major food and beverage trade events throughout 2026 and 2027. These events provide opportunities to meet importers, distributors, retailers, foodservice operators, and industry stakeholders across New Zealand's food and agricultural sector. Trade shows also serve as valuable platforms for launching new products, assessing consumer trends, and building in-market partnerships.

U.S. exporters may also find it beneficial to attend [Fine Food Australia](#) trade show, which New Zealand importers and retailer actively attend. U.S. exporters may reach out to FAS Wellington for a list of New Zealand attendees, if interested.

Table: List of Consumer-Oriented Focused Trade Shows

Show Name	Show Date	Products Featured
Fine Food New Zealand	June 2027	Consumer products
The Food Show	July & August 2026; April 2027	Consumer products
Fieldays	June 2026 and June 2027	Animal feed and agricultural technology

Appendix V

Agricultural and Food Import Statistics

Best High-Value, Consumer-Oriented Product Prospects

New Zealand continues to present strong opportunities for U.S. exporters of high-value, consumer-oriented food and beverage products. Consumer preferences in New Zealand often mirror broader trends emerging in the United States and Australia, particularly in the areas of health, wellness, convenience, and sustainability. New Zealand retailers are actively expanding product ranges to meet demand for functional beverages, plant-based foods, fermented products, nuts, protein-rich snacks, and allergy-friendly foods. Products with clear health or performance benefits including those containing added vitamins, minerals, protein, probiotics, amino acids, or natural ingredients are performing particularly well in both retail and food service channels.

Products Present in Market with Good Sales Potential

U.S. exporters are well positioned in categories aligned with New Zealand consumers' increasing focus on health and wellness. Demand remains strong for:

- Gluten-free, lactose-free, nut-free, grain-free, and other allergy-friendly foods
- Functional and fortified beverages
- Plant-based proteins and dairy alternatives
- Premium snack foods and health-oriented convenience products
- Natural and organic packaged foods
- Pet foods with premium or functional ingredients

Products Not Present in Market with Good Sales Potential

Several product categories remain underdeveloped in the New Zealand market and may offer future growth opportunities for U.S. suppliers. These include:

- Innovative ethnic and international foods
- Advanced functional health foods and supplements
- Fermented foods and beverages with probiotic positioning
- Plant-based and alternative protein products
- Specialty wellness snacks and sports nutrition products

Attachments:

No Attachments