



Breakfast Cereals in New Zealand

November 2025

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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

CHANNELS

Supermarkets strengthen category presence through wellness-led merchandising and expanded free-from ranges
E-commerce gains traction as rapid delivery, digital visibility and convenience drive occasional cereal purchases

CATEGORY DATA

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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

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