ACII

Aotearoa Consumer Insights Institute / Auckland

Dietary Trends Survey

Wave 11 Annual Report

Published February 2026
Auckland, New Zealand

Field period: 1 September to 31 October 2025

FOREWORD

About this Report

New Zealand Dietary Trends Survey Annual Report - Wave 11 - Field 1 Sept to 31 Oct 2025

Aotearoa Consumer Insights Institute (ACII) - Auckland Report published February 2026

Aotearoa Consumer Insights Institute is an independent NZ research firm. The Annual Dietary Trends Survey is funded by a consortium of NZ agribusiness, retailer, and category-association sponsors. Sponsors do not have advance access to wave findings. Methodology audited annually by the NZ Market Research Society.

Methodology Overview

Wave 11 surveyed 4,287 New Zealand adults aged 18+ on dietary preferences, weekly grocery patterns, and protein consumption. Sample is nationally representative by age, region, urban/rural, and household income (per Stats NZ benchmarks). Field period: 1 September to 31 October 2025. Methodology: online panel + CATI top-up. Margin of error ±1.5% at 95% confidence.

EXECUTIVE SUMMARY

Headline Findings

1. The ‘flexitarian’ segment - defined as adults consciously reducing meat consumption without eliminating it - has grown to 21.4% of NZ adults (vs 18.6% in Wave 10, 14.3% in Wave 7). Three-year CAGR: +13.2% in segment share.
2. The ‘traditional omnivore’ segment has compressed to 69.8% (vs 73.1% Wave 10, 78.9% Wave 7). Net annual share migration from traditional to flexitarian: ~0.7-1.0 pp/year over the survey window.
3. The ‘vegetarian’ (no red/white meat or fish, dairy and egg permitted) segment is stable at 7.3% (vs 7.1% Wave 10, 6.8% Wave 7). Slow growth, statistically flat.
4. The ‘vegan’ segment (no animal products) is 1.5% (vs 1.2% Wave 10). Small in absolute terms; grew faster than vegetarian segment but from a low base.

> *“Flexitarian share has grown from 14.3% in Wave 7 to 21.4% in Wave 11 - a +13.2% three-year CAGR, and the single largest segment shift recorded in the survey’s history.”*

WAVE-OVER-WAVE

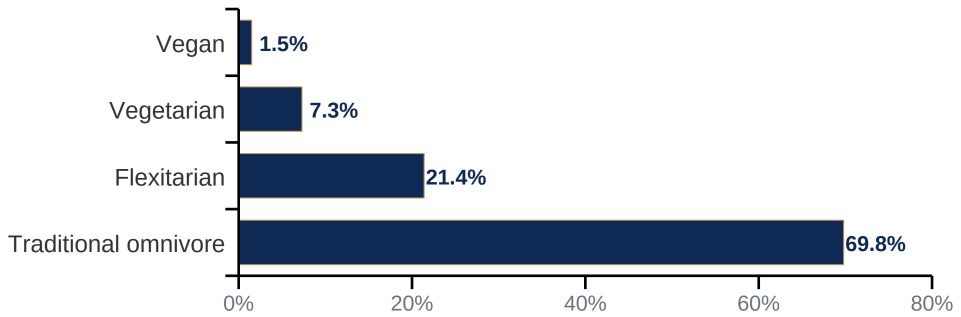
Table 1 - NZ Dietary Segment Share, Wave 7 to Wave 11 (% of adults)

Segment	Wave 7 (2021)	Wave 9 (2023)	Wave 10 (2024)	Wave 11 (2025)
Traditional omnivore	78.9%	75.4%	73.1%	69.8%
Flexitarian (reduced-meat)	14.3%	16.8%	18.6%	21.4%
Vegetarian	6.8%	7.0%	7.1%	7.3%
Vegan	0.0%*	0.8%	1.2%	1.5%

** not separately tracked in Wave 7. Figures weighted to Stats NZ benchmarks (age, region, urban/rural, household income).*

Source: ACII Wave 11 (n=4,287, field 1 Sept-31 Oct 2025).

Figure 1. NZ dietary segment share, Wave 11 (% of adults)



CATEGORY DEEP-DIVE

Implications for the Egg Category

ACII has tracked egg consumption by dietary segment since Wave 7. The headline finding - counter-intuitive to industry observers who expect dietary shifts to depress egg demand - is that the egg category is a net beneficiary of the traditional-to-flexitarian and traditional-to-vegetarian migration. Two reasons: (a) Eggs are accepted within both flexitarian and vegetarian diets as a complete-protein substitute for red and white meat. Plant-based meat alternatives are still a small share of substitution decisions.

(b) Per-capita egg consumption is higher among flexitarians and vegetarians than among traditional omnivores, reflecting the protein-substitute role.

Table 2 - Per-Capita Egg Consumption by Dietary Segment, Wave 11 (eggs per adult per year)

Segment	Eggs/adult/yr	Δ vs national avg
Traditional omnivore	224	-2.2%
Flexitarian	242	+5.7%
Vegetarian	263	+14.8%
Vegan	0	n/a
national average (weighted)	229	-

Source: ACII Wave 11 (n=4,287, field 1 Sept-31 Oct 2025).

The flexitarian segment now consumes ~242 eggs/adult/year on average, vs ~224 for the traditional omnivore segment and 263 for the vegetarian segment. Combined, the segment-mix shift adds approximately 0.4-0.6% per year to per-capita egg consumption, before accounting for population growth.

FORWARD VIEW

Forward Projection - Per-Capita Egg Consumption

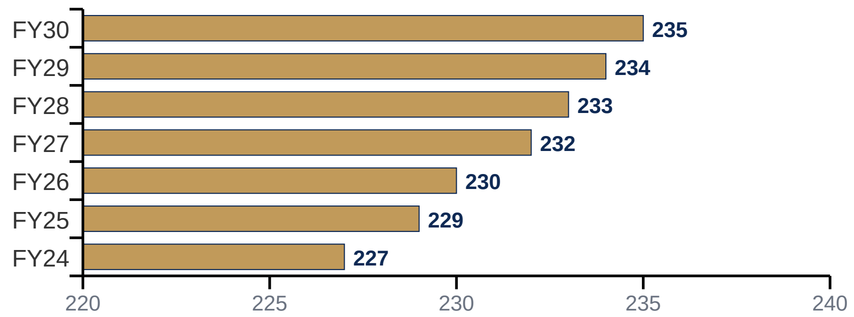
Combining the dietary-mix shift with structural per-capita stability within each segment, ACII projects national-average per-capita egg consumption as follows:

Table 3 - Projected NZ National-Average Per-Capita Egg Consumption (eggs/adult/yr)

Year	Per-capita (eggs/yr)	% growth YoY
FY24 (actual)	227	-
FY25 (actual)	229	+0.9%
FY26 (projected)	230	+0.4%
FY27 (projected)	232	+0.9%
FY28 (projected)	233	+0.4%
FY29 (projected)	234	+0.4%
FY30 (projected)	235	+0.4%

Source: ACII Wave 11 (n=4,287, field 1 Sept-31 Oct 2025).

Figure 2. Projected NZ per-capita egg consumption (eggs/adult/yr)



Industry forecasts that hold per-capita consumption flat at 229 eggs/yr across the forecast horizon under-state egg-category demand growth by approximately 0.4-0.5% per year. Combined with population growth of ~0.9% pa (Treasury demographic baseline), the projected NZ egg category volume growth is therefore approximately 1.3-1.5% per year over FY26-FY30, not the ~0.9% pa implied by population alone.

METHODOLOGY

Methodology Notes

Egg consumption is self-reported via 7-day food-frequency recall, calibrated against Stats NZ Household Economic Survey grocery-spend data and EPF NZ farmgate volume releases. Self-report adjustment factor: 0.91 (respondents under-report eggs by ~9% on recall vs actual purchase records). All figures presented above are post-adjustment.

Egg consumption figures exclude eggs consumed as ingredient in finished foods (baked goods, sauces, prepared meals). Recall-only figure isolates shell-egg and food-service-prepared egg consumption.

Sample & Field

Sample is nationally representative by age, region, urban/rural, and household income (per Stats NZ benchmarks). Field period: 1 September to 31 October 2025. Methodology: online panel + CATI top-up. Margin of error ±1.5% at 95% confidence. n=4,287 New Zealand adults aged 18+.

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Companion Volumes

This Annual Report is accompanied by category-specific addenda available to ACII sponsors and licensees. The Wave 11 Egg Category Addendum extends the segment-mix and per-capita analysis presented in Section ‘Implications for the Egg Category’ with deeper channel, pricing, and substitution detail. Other sector addenda (red meat, poultry meat, dairy, plant-based) are published on the same release schedule.

Companion volumes are made available to category sponsors and licensees under the standard ACII access terms.