ACII

Aotearoa Consumer Insights Institute (ACII) - Auckland

Dietary Trends Survey

Wave 11

Egg Category Addendum

Companion volume to the Wave 11 Annual Report

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Companion volume to the Wave 11 Annual Report.

Scope and methodology

This addendum extends the Wave 11 Annual Report with category-specific cuts commissioned by category sponsors covering (1) plant-based egg substitute awareness and trial; (2) cost-of-living trade-down behaviour across egg production tiers; (3) generational and demographic-cuisine consumption splits; (4) premium-tier willingness-to-pay and NZ-Made provenance preference; (5) shifting egg purchase drivers including the high-protein and cholesterol-rehabilitation narratives. Sample base: n=4,287 NZ adults; egg-buyer sub-base n=4,012. Margin of error ±1.5% at the headline level; ±2.5% on category sub-cuts. Field period 1 Sept to 31 Oct 2025.

Survey methodology summary

Sample base	n=4,287 NZ adults
Egg-buyer sub-base	n=4,012
Field period	1 Sept to 31 Oct 2025
Methodology	Online panel plus CATI top-up (consistent with parent report)
Margin of error	±1.5% at the headline level; ±2.5% on category sub-cuts
Weighting	Nationally representative per Stats NZ (age, gender, region, ethnicity)

About this Cut. The Egg Category Addendum is a commissioned special cut produced alongside the Wave 11 Annual Report. Commissioning category sponsors receive the full data tables and category-specific cross-tabs under separate cover. Public release of this addendum is permitted for category sponsors and licensees only; redistribution outside the sponsor list requires written permission from ACII.

1. Plant-based egg substitute awareness and trial

Wave 11 added five questions covering awareness, trial, repeat use, and intent on plant-based egg substitutes (just Egg, OGGS, Crackd, Orgran Easy Egg, and equivalent products). Distribution in NZ at the time of fielding: Orgran Easy Egg has the broadest grocery distribution (free-from / vegan section in most major chains); just Egg available via specialty retailers and online channels; OGGS used predominantly in vegan baking; Crackd not stocked in NZ at field time. Plant-based egg category share of total egg-by-volume-equivalent demand is estimated below 1% nationally.

Table 1.1 - Awareness, trial and intent by dietary segment

Dietary segment	Aware (%)	Tried ≥1x (%)	Use regularly (%)	Intend to try (next 12mo) (%)
Traditional omnivore	11	2	<1	3
Flexitarian	28	7	1	12
Vegetarian	44	18	5	21
Vegan	92	76	58	n/a
national (weighted)	17	5	1	7

Source: ACII Wave 11 (n=4,287, field 1 Sept-31 Oct 2025). Sub-base: egg-buying adults n=4,012. Margin of error ±2.5% on category sub-cuts.

Key reads. (a) Trial concentrates in the flexitarian and vegetarian segments; trial-to-regular conversion remains very low (1% of flexitarians use regularly despite 7% trial). (b) Trial-to-intent ratio in the flexitarian segment is rising - intent-to-try of 12% vs Wave 9 4% suggests the latent substitution pool is growing. (c) Plant-based egg substitutes today are a specialty-channel category in NZ; the inflection signal to watch is when major retailers (Foodstuffs, Woolworths NZ) range a chilled plant-based egg SKU on the egg shelf adjacency rather than in the free-from section. NZ assortment decisions tend to lag Australian equivalents (Coles, Woolworths AU) by approximately 18 to 30 months on category innovations of this type. ACII modelling assumes 1.5% to 2.5% of national shell-egg volume is displaceable by FY28-30 if mainstream retailer assortment evolves as the AU pattern suggests.

2. Cost-of-living trade-down behaviour across egg tiers

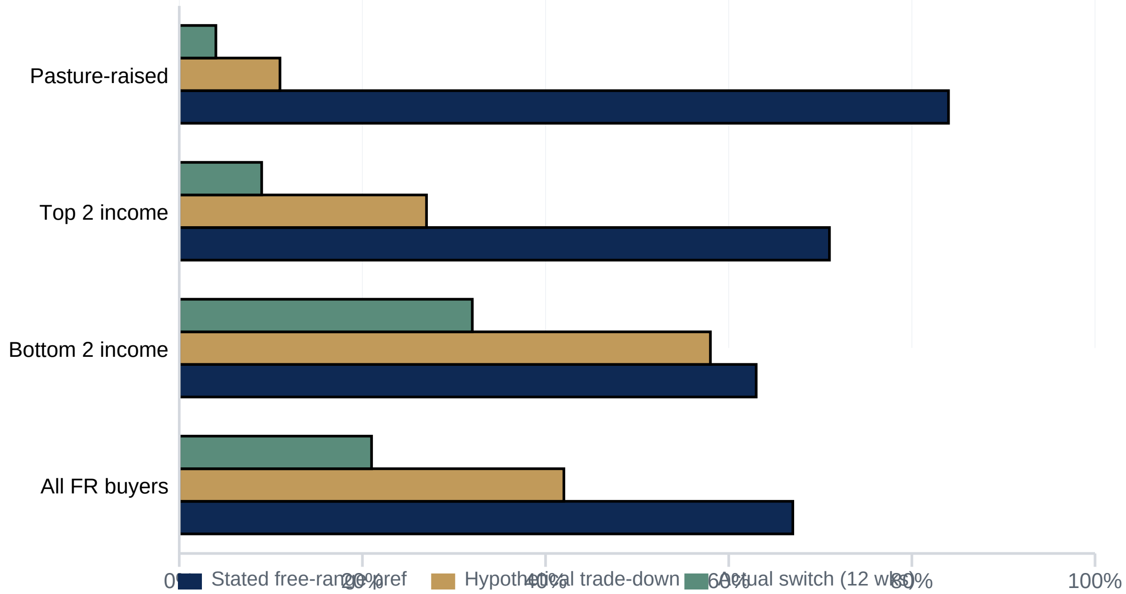
Wave 11 paired two question modules: stated welfare preference (Q42 'all else equal, would you prefer free-range over barn or colony eggs?') and revealed-preference trade-down (Q47 / Q48 / Q49 - hypothetical NZ$30/week budget tightening, then 12-week recall on actual switching). Stated welfare preference for free-range remains high at 67% of egg-buying adults - consistent with Waves 9 and 10. The new finding is the magnitude of revealed-preference trade-down under genuine budget pressure.

Table 2.1 - Free-range trade-down behaviour by income segment

Segment	Stated free-range pref (%)	Hypothetical trade-down: yes (%)	Actual switch within 12 weeks (%)
All free-range buyers	67	42	21
Free-range buyers - bottom 2 income quintiles	63	58	32
Free-range buyers - top 2 income quintiles	71	27	9
Pasture-raised / specialty buyers	84	11	4

Source: ACII Wave 11 (n=4,287, field 1 Sept-31 Oct 2025). Sub-base: egg-buying adults n=4,012. Margin of error ±2.5% on category sub-cuts.

Figure 2.1 - Stated preference vs revealed trade-down (% of egg-buyers)



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

Key reads. (a) The free-range premium tier carries material consumer-side elasticity: 20-25% of free-range buyers actually do trade down to barn or colony within 12 weeks of a NZ$30/week budget event. (b) Elasticity skews heavily by income quintile - bottom-quintile free-range buyers trade down 3-4x as often as top-quintile buyers. (c) Pasture-raised / specialty buyers are markedly less elastic (4% actual switching). The implication for category-level free-range premium retention is that the commodity free-range tier (the bulk of free-range volume) faces consumer-side headwind during cost-of-living squeezes; the specialty premium tier is much more durable. Industry narratives that treat 'free-range' as a homogeneous tailwind tier conflate two consumer segments with very different price elasticities.

3. Generational and demographic-cuisine consumption

Wave 11 added age-cohort and ethnicity cuts to the egg consumption module. Asian-NZ ethnicity cohort base n=692 (weighted); Pasifika n=412; Maori n=688; European NZ n=2,495.

Table 3.1 - Per-capita egg consumption by generational and ethnicity cohort

Cohort	Eggs per adult per year	Delta vs national avg (229)
Gen Z (18-29)	245	+7.0%
Millennials (30-44)	238	+3.9%
Gen X (45-59)	224	-2.2%
Boomers (60-74)	218	-4.8%
Silent (75+)	208	-9.2%
Asian-NZ ethnicity	268	+17.0%
European NZ ethnicity	224	-2.2%
Maori ethnicity	232	+1.3%
Pasifika ethnicity	246	+7.4%

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

Key reads. (a) Generational gradient is positive for category - Gen Z and Millennials consume more eggs than Boomers and Silent cohorts, partly driven by high-protein convenience patterns and flexitarian adoption (eggs as protein substitute). (b) Asian-NZ ethnicity cohort consumes 17% more eggs per capita than the national average - reflects egg-heavy cuisine traditions across Chinese, Korean, Japanese, Filipino, Indian cooking; given NZ Stats projections of Asian-NZ ethnicity rising from ~17% (2023 census) to ~22-24% (2038), this cohort shift contributes approximately 0.2-0.3 percentage points per year to national-average per-capita egg consumption on top of the dietary-mix shift. (c) Pasifika cohort also above national average (+7.4%), reinforcing the demographic-cuisine compounding.

4. Premium-tier willingness-to-pay and NZ-Made provenance

Wave 11 added a willingness-to-pay (WTP) module on three premium tiers: pasture-raised, omega-3 enriched, and certified organic. Reference price: 12-pack barn eggs at NZ$7.00.

Table 4.1 - Willingness-to-pay premium and buyer skew by tier

Premium tier	Stated WTP premium vs barn (%)	Repeat purchase rate (%)	Buyer skew - top 2 income quintiles (%)
Commodity free-range	21	78	54
Pasture-raised	62	71	78
Omega-3 enriched	44	58	69
Certified organic	78	63	82

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

NZ-Made provenance. When asked to rank egg-purchase drivers (Q33), 'product of New Zealand' / NZ-Made provenance ranked 2nd (behind price), up from 5th in Wave 7. Imports of table eggs into NZ are negligible - MPI biosecurity controls effectively block imported shell-egg product. Provenance preference therefore accrues at category level rather than as a between-producer differentiator. NZ-Made provenance does, however, function as a category-level shield against imported plant-based egg substitute displacement: the 'product of New Zealand' driver is inherent to NZ shell egg and is absent from imported plant-based equivalents at point of purchase.

5. Shifting egg purchase drivers

Wave 11 ranked stated egg-purchase drivers across 12 attributes. Notable shifts vs Wave 7 (2021):

Table 5.1 - Egg purchase driver ranking, Wave 7 vs Wave 11

Driver	Wave 7 rank	Wave 11 rank	Shift
Price	1	1	stable
Product of New Zealand / NZ-Made	5	2	+3 ranks
High in protein	8	3	+5 ranks
Free-range / animal welfare	2	4	-2 ranks
Best-before / freshness	3	5	-2 ranks
Brand familiar	4	6	-2 ranks
No artificial additives	6	7	-1 rank
Heart-healthy / cholesterol-friendly	11	8	+3 ranks
Promotion / on-sale	7	9	-2 ranks
Organic / certified standards	10	10	stable
Pack size / convenience	9	11	-2 ranks
Recommended by family / friend	12	12	stable

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

Key reads. (a) The 'high in protein' driver moved from 8th to 3rd over the survey window - reflects the broader high-protein eating trend (gym / fitness originally; broadened with GLP-1 weight-loss medication uptake requiring protein maintenance on lower total calories). Eggs are the lowest-cost complete-protein per gram in mainstream NZ grocery. (b) 'Heart-healthy / cholesterol-friendly' moved from 11th to 8th - reflects the rehabilitation of eggs in mainstream nutritional advice. Heart Foundation NZ's current public position permits up to six eggs/week for individuals at increased CVD risk and includes eggs in heart-healthy eating patterns for the general healthy population - a material softening from the late-1990s 'limit to three per week' framing. (c) 'Free-range / animal welfare' driver actually fell two ranks vs Wave 7, partly because welfare attributes are increasingly assumed (Phase 1 cage ban completed end-2022; cage-free is the default expectation) and partly because cost-of-living pressure has moved price up the relative weighting.

Headline implications for forecasting and category strategy

Net consumer-demand picture for the egg category in NZ: Category volume is on a modest tailwind (+0.4-0.5% per-capita pa from dietary-mix shift; +0.2-0.3% per-capita pa from demographic-cuisine compounding; combined approximately +0.6-0.8% per-capita pa on top of population growth). The premium TIER mix is a more nuanced story: specialty premium (pasture-raised, omega-3, certified organic) is durable and income-skewed; commodity free-range premium faces consumer-side headwind from cost-of-living elasticity (20-25% of free-range buyers will trade down under genuine budget pressure). Plant-based substitution is currently negligible but the FY28-30 displacement risk is 1.5-2.5% of national shell-egg volume contingent on retailer assortment evolution. NZ-Made provenance is a category-level tailwind and a shield against imported plant-based displacement.

Methodology notes

Sample base, weighting, self-report adjustment factor (0.91) and inclusion / exclusion rules per the Wave 11 Annual Report main volume. Egg-purchase driver rankings use forced-choice ranking (top-3 selection then ordered) calibrated against Stats NZ Household Economic Survey grocery-spend data and EPF NZ farmgate volume releases. Plant-based egg substitute distribution observations cross-checked against Foodstuffs and Woolworths NZ public assortment data plus Vegan Society of Aotearoa NZ retail directory at field date.

Commissioning sponsors

The Wave 11 Egg Category Addendum is commissioned by category sponsors spanning shell-egg producers, retailer category teams, foodservice distributors, and analytical / advisory licensees of the ACII Wave 11 data programme. Sponsor list available on request to category sponsors and licensees under the standard ACII sponsor agreement.