FORWARD
INSIGHT AND STRATEGY

Unlocking growth for the New Zealand potato category

Research report

Forward Insight & Strategy | Potatoes NZ

March 2025

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Background

Potatoes New Zealand is looking to drive total category growth.

As the representative body for the over 150 levy-paying potato growers across New Zealand, Potatoes NZ is responsible for championing growers' interests and enabling better outcomes for the New Zealand potato industry. A confident future relies upon ensuring strong ongoing demand for potatoes in the domestic market, which accounts for 87% of total value.

However, despite potatoes historically being a much-loved vegetable of choice for New Zealanders, **potatoes have seen a recent decline in consumption** - within the context of an overall decline in fresh produce consumption nationally.

There is a need to turn around this decline, supporting growth in users and usage across occasions. The job-to-do is to support the total category within retail, including both frozen and fresh potatoes (but with a particular focus upon fresh), and crisps.

Research is required to understand what is driving the decline, the current state of the category, and to identify prioritised opportunities that will unlock category growth.

Tangible and practical outcomes are required, with robust evidence and an action plan for change. The research will inform consumer and market-led decisions around next steps (across product, promotion and placement) to grow consumption.

THE OBJECTIVES

Deepen understanding of the New Zealand potato category, informing tangible opportunities to grow total retail consumption (across fresh, frozen and crisp categories) while maintaining value.

1. **Hypothesise the category risks or problem to solve for the category to ensure a positive future for growers**
2. **Understand the consumer category today: Users and usage, demand spaces**
   - Understand usage, frequency, behaviours and attitudes across formats (Consumer retail fresh, frozen, crisps)– how many people are purchasing and consuming, how often, who is the target and how does this break down (segments)
   - Quantify main current consumption moments - where potatoes fit into people's lives today, for/with what, in what occasions, in what cuisine types/recipes etc.
3. **Across demand spaces, understand drivers, barriers, needs, decision making**
   - Understand drivers and triggers to purchase and consumption – what people value about potatoes functionally, experientially, emotionally; and what moments, meals, needs etc bring potatoes to mind
   - Understand perceived benefits and drivers of liking – what is valued about potatoes
   - Understand current barriers and tensions - what limits people from purchasing potatoes (at all or more often)
4. **Understand shopper dynamics**
   - Understand in store decision making - what influences consideration and purchase
   - Understand drivers of consideration and mental availability, pathway into the category, the choice set (what foods we are competing directly with in each demand space)
5. **Explore opportunities for growth across demand spaces**
   - Explore what is working to drive engagement with potatoes across other similar markets – to inform potential levers to pull and concepts to test
   - Understand which demand spaces we can exploit (and how) to drive category growth
   - Explore responses to concepts to increase category engagement (RTBs, education re recipes and moments, messaging concepts) and how this could be delivered (retail/POS marketing, pack messaging, digital marketing etc)

The approach in summary

1 GATHERING INPUTS

Leveraging understanding of similar international markets to inform hypotheses, probes, quant survey and qual stim.

Audits and development workshops

- Brief audit
- Kick off workshop online

2 QUANTITATIVE MAPPING

Understanding the category users, usage and demand spaces, to deliver understanding of the target, the current state, and sized areas of opportunity to grow the category. **Informing the job to be done: drive users, or usage.**

Quantitative research

- 12-minute online survey
- N=700 respondents across NZ

3 WORKSHOPS

Future-focused workshops to focus on the sector problem to solve and determine levers to pull to actuate change.

Developing tangible concepts to test in qual – e.g. messaging concepts, innovation concepts etc.

Audits and development workshops

- 2x workshops in person
- Auckland, Christchurch
- Growers, board, wider stakeholders.

4 QUALITATIVE EXPLORATION

Building deeper understanding of the current state needs, drivers, barriers, behaviors etc across demand spaces. Exploring tangible opportunities to grow the category through responses to concepts.

In depth qualitative, ethnographic, sensorial research

- Ethnographic in-home and shopper pre-tasks
- 3 online discussion groups

FORWARD

Fieldwork & Questionnaire

15-minute online survey.
Household shoppers in New Zealand, regular/occasional potato consumers and non-rejectors, population representative for age and gender.

Key measures covered by questionnaire:

- Purchase and consumption frequency: fresh potatoes, processed potatoes (frozen and crisps)
- Vegetable category needs and purchase drivers
- Fresh potato category needs and purchase drivers - performance in vegetable category
- Premium drivers, fresh potato occasions, potato varieties
- Substitution of fresh potato with other starchy foods, barriers to consumption
- Frozen potato drivers and barriers, occasions
- Potato crisp drivers and barriers
- Demographics – household makeup, income, etc
- Specific diets followed, types of cuisines cooked at home.

EXECUTIVE SUMMARY

Executive summary

1. Fresh potatoes

- Fresh potatoes are the most frequently consumed vegetable in NZ, with 67% consuming potatoes twice a week or more and **83% consuming potatoes at least weekly**. Growth in volume could be achieved by driving greater consumption of weekly users. Beliefs and attitudes of loyal users (consumption twice a week or more) identified what they value in potatoes, providing direction for greater engagement with less frequent users.

THEME ONE

- Potatoes tend to be viewed as a carbohydrate, rather than a vegetable.
  - The substitution set for potatoes included rice, kumara, pasta and noodles
  - Carbohydrate content was a common barrier to consuming more potatoes
  - Potatoes were considered a healthy alternative to rice, pasta, noodles by loyal users
- Potatoes under-indexed for health and nutrition, compared to vegetables. This was particularly true for less-frequent consumers (once a week or less), with significantly more loyal consumers valuing fresh potatoes that are particularly healthy or nutritious than less-frequent consumers.
- **JOB TO DO: Shift consumer perception of potatoes from being a filling carbohydrate to being a healthy vegetable. This may be achieved by:**
  - **dialing up perceptions of potato as a healthy whole food with nutrition benefits beyond carbohydrates**
  - **highlighting the nutritional benefits of potatoes over other carbohydrate alternatives**

THEME TWO

- Potatoes were considered a versatile ingredient that is widely accepted in the household, being convenient to store and cook.
- Agria was the most commonly purchased variety, although most buy loose or packaged (unlabelled) white potatoes.
- There was significantly greater knowledge of different varieties and their different uses by loyal consumers
- For all participants, potatoes fulfil specific needs relating to comfort (familiar, soul food) and balance (something for everyone, makes life easy).
- For loyal consumers, potatoes also fulfil needs relating to being bold (exciting, surprising and bold flavours) and refinement (bringing something special to the meal).
- **JOB TO DO: Create opportunities to engage ALL consumers and showcase the flavours and textures of potatoes, driving growth of premium value. This may be achieved by:**
  - **Elevating the presence of different varieties on shelf**
  - **Enhancing knowledge of different varieties and their strengths and benefits**
  - **Potentially innovating to maximise differentiation between varieties, fulfilling cooking needs more specifically**
  - **Potentially innovating to deliver fresh plus flavour, convenient dish solutions**

Executive summary

2. Frozen potato products

- Frozen potato products were valued as a **cost-effective and convenient** option, particularly as a “useful back-up meal option”. **63% of respondents consumed them at least weekly, representing some headspace for increasing consumption frequency.**
- Health and nutrition were not drivers of purchase, and **low perceived healthiness was a barrier to ~one-third of consumers**.
- Fresh potatoes were the main competitor to frozen potato products, preferred for their taste, nutrition and versatility.
- Eating quality and consistency were barriers to consumption.
- **JOB TO DO: Increase consumption frequency of frozen potato products, so that they are selected as a convenient alternative to other carbohydrates, rather than replacing fresh potato eating occasions. This may be achieved by:**
    - **Elevating the health and nutrition benefits of potatoes as a whole food, to have a halo effect on frozen potato products**
    - **Potentially innovating to provide quality assurance**
    - **Potentially innovating to deliver convenient dish solutions with enhanced flavours, offering an equally flavourful but more convenient option to fresh potatoes**

3. Potato crisps

- Potato crisps had very high penetration in the savoury snack category, with **64% consuming them at least weekly, despite being considered unhealthy and there being a desire for variety of snack products**. This may suggest limited headspace to grow volume in the future
- Premiumisation and innovation are the greatest opportunities for growing value growth.

FRESH POTATOES

Consumption behaviours
Category drivers and barriers
Consumer demand spaces

FRESH POTATOES

Consumption behaviours

Fresh potatoes are the most commonly consumed vegetable, amongst NZers who at least consider eating potatoes

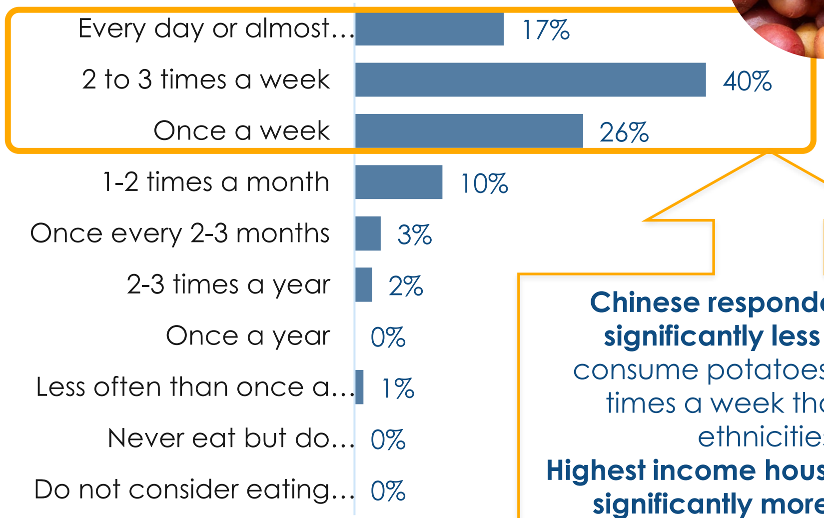
Penetration is very strong. The biggest volume gain would be to shift weekly users to using more often.

Veggie drawer ranking

Based on % weekly users

1	83% ↑	Potatoes
2	78% ↑	Tomatoes
3	78% ↑	Onions
4	75% ↑	Salad greens such as lettuce, rocket or baby spinach
5	72% ↑	Carrots
6	65% ↑	Broccoli/Broccolini
7	59% ↑	Capsicum/Peppers
8	54%	Cooking greens such as silverbeet, spinach or bok choy
9	53%	Avocado
10	50%	Mushrooms
11	45% ↓	Cabbage
12	44% ↓	Cauliflower
13	44% ↓	Kumara – sweet potato
14	37% ↓	Courgettes
15	36% ↓	Pumpkin
16	21% ↓	Eggplant
17	17% ↓	Taro

Fresh potato consumption frequency



Chinese respondents were significantly less likely to consume potatoes 2 or more times a week than other ethnicities.
Highest income households were significantly more likely to consume potatoes (nearly) daily. Other demographic factors had limited impact, except for a **tendency toward more frequent consumption in regions** compared to main cities (Auckland and Christchurch).

Q: When in season or easily available, how often do you usually EAT or COOK WITH these vegetables?
N= 700 (Sample of potato consumers)

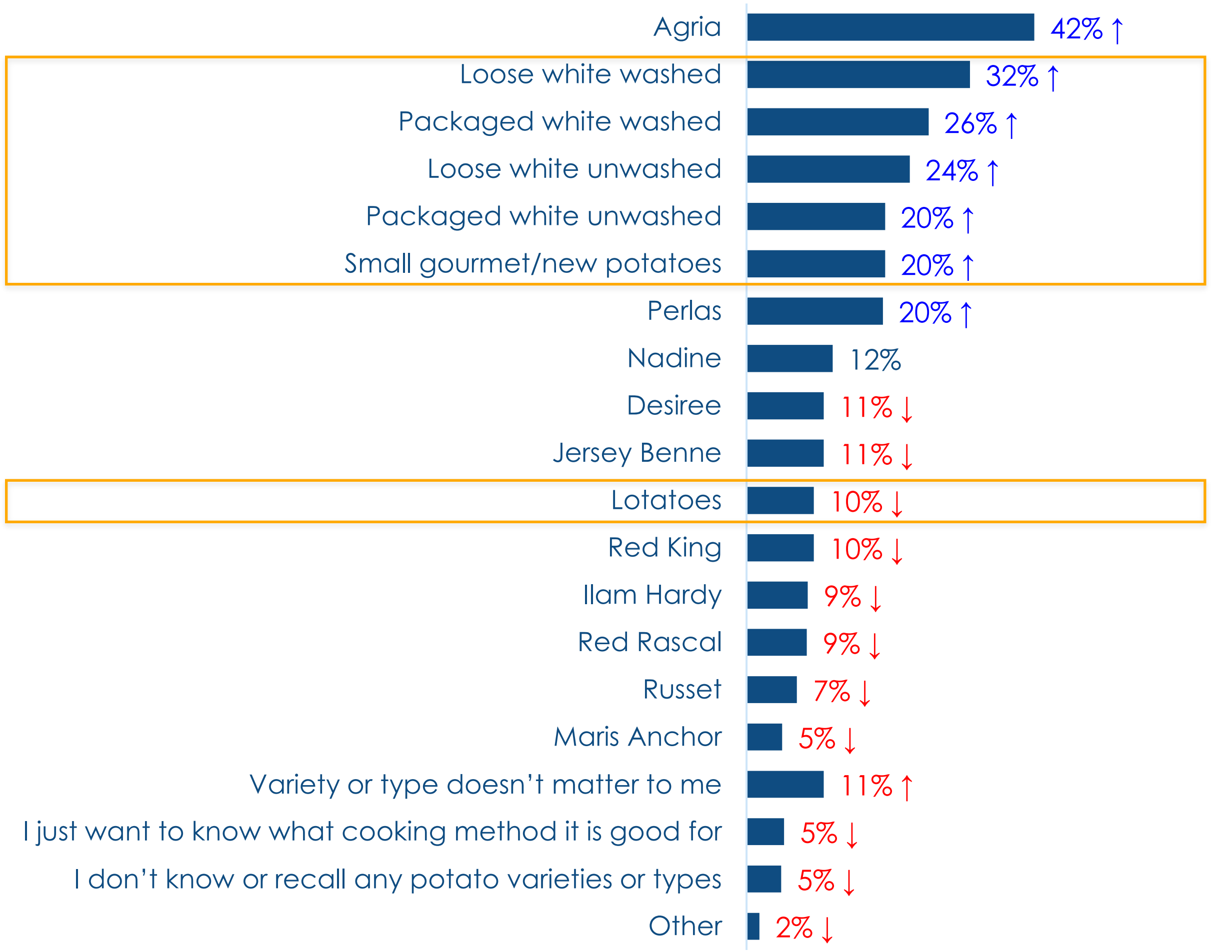
Statistical coding legend:
Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

Most common varieties purchased

- With the exception of Agria, and to a lesser degree Nadine, **the most commonly purchased potatoes were generic white potatoes,** washed or unwashed, loose or packaged.

- A key barrier to consuming more potatoes is the ‘high carb’ perception. **Promotion of Lotatoes may also encourage increased consumption.**

OPPORTUNITY to increase value through highlighting role and eating qualities of varieties.



Q: What varieties or types of FRESH potatoes do you typically buy?

Statistical coding legend: Blue or ↑= Statistically high at 95% confidence level,
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N= 700

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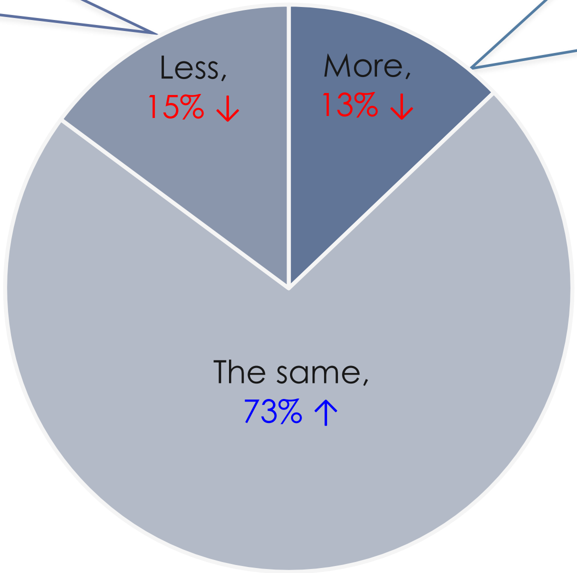
Most people are consuming the same amount of fresh potatoes as in the past. Increased consumption is being driven by value perception, versatility, household acceptability and serving a filling and nutritious need.

Why? (n=104)
- Lower carb intake (24%)
- More expensive than used to be (15%)
- Watching my weight/lowering calories (9%)
- Trying other veges/variety in diet (8%)
- Family don't like them (6%)
- Not convenient/time to cook (5%)
- Don't each as much, getting older (5%)
- Prefer kumara (5%)

Are you consuming more, less or the same fresh potatoes than ever before?



Why? (n=88)
- Good value (32%)
- I like them (18%)
- Versatile (13%)
- They are liked by everyone (10%)
- Healthy/nutritious (9%)
- They are filling (8%)
- Changing eating habits (5%)
- Easily available (5%)
- Learned new recipes (5%)
- Good quality (5%)
- Prefer fresh to processed/price (5%)

Q: Are you consuming more, the same, or less FRESH potatoes than ever before?
Q: Why is that?

Statistical coding legend:
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N=700 potato consumers

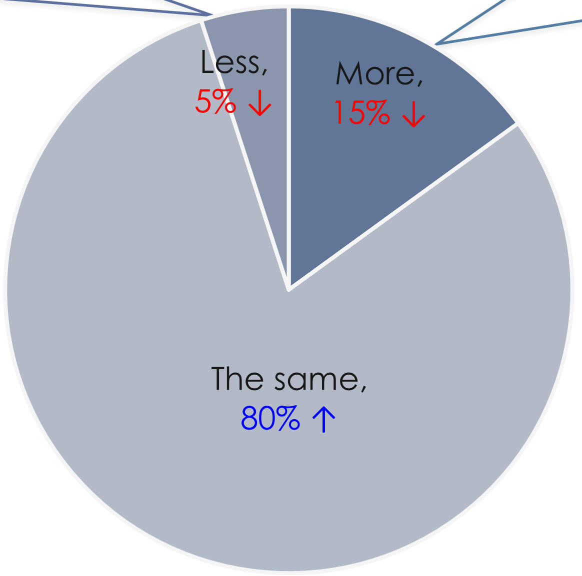
FORWARD

In the future, consumption may increase as a result of perceived good value offering a healthy, versatile, filling and widely accepted meal option.

Future decreased consumption may be driven by a continued desire to reduce carbohydrate intake, wanting healthier options and price increases. A preference for kumara is also capturing a small proportion of potential potato consumers.

Why? (n=37)
- Reducing carb intake (35%)
- Watching what I eat (14%)
- For health/to feel healthier (11%)
- The price is going up (8%)
- Getting older, eating less (8%)
- Too starchy (5%)
- Prefer kumara (5%)

In the future, do you intend to consume more, the same, or less fresh potatoes?



Why? (n=102)
- I like them/everyone likes them (31%)
- Economical/cheap (18%)
- Healthy/nutritious (12%)
- Versatile (9%)
- Family is growing older (7%)
- Filling option (6%)
- Better quality (5%)
- Easy to cook (5%)

Q: In the future, do you intend to consume more, the same, or less FRESH potatoes?
Q: Why is that?

Statistical coding legend:
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N=700 potato consumers

Fresh potatoes are used in a variety of ways, but tend to provide the base or side for a meal, rather than the “main ingredient”

Of note, significantly more loyal consumers used fresh potatoes as a healthy alternative to rice, pasta and noodles.

		2 or more times a week n=399	Less often* n=278
Mashed as part of a main meal	53% ↑	55%	50%
Oven roasted or baked as part of a main meal (e g ,…	53% ↑	54%	52%
Boiled as part of a main meal	43% ↑	52% ↑	33% ↓
In stews, casseroles or boil ups	40% ↑	45% ↑	33% ↓
Air-fried as part of a main meal (e g , homemade chips,…	36% ↑	40%	31%
For a specific potato dish (e g potato gratin)	35% ↑	39%	31%
In cold or warm salad	35% ↑	40% ↑	29%
As a filling carbohydrate	33% ↑	35%	29%
As an everyday meal base	30% ↑	36% ↑	22% ↓
In curries	28%	31%	24%
As a healthy alternative to rice, pasta, noodles, etc…	27%	32% ↑	21% ↓
As a healthy meal base	24%	27%	20%
In soups or broths	24%	26%	23%
For kids meals	20% ↓	24% ↑	15%
As the 'main event or ingredient' in meals	19% ↓	22%	16%
In vegetarian or plant-based dishes	16% ↓	19%	12%
As a binder or base (e g in gnocchi, fish cakes, burgers,…	16% ↓	18%	14%
In omelets, quiche, frittata or egg dishes	15% ↓	18%	11%
In pies or savoury tarts	15% ↓	19% ↑	8% ↓
As a snack	13% ↓	16%	9%
For brunch dishes	13% ↓	15%	10%
With breakfast	7% ↓	9%	5%

Q: In which occasions or situations do you generally eat, prepare or cook with FRESH potatoes?
** “Less often” is defined as respondents who consume fresh potatoes once a week to once every 2-3 months.*

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FRESH POTATOES

Category drivers and barriers

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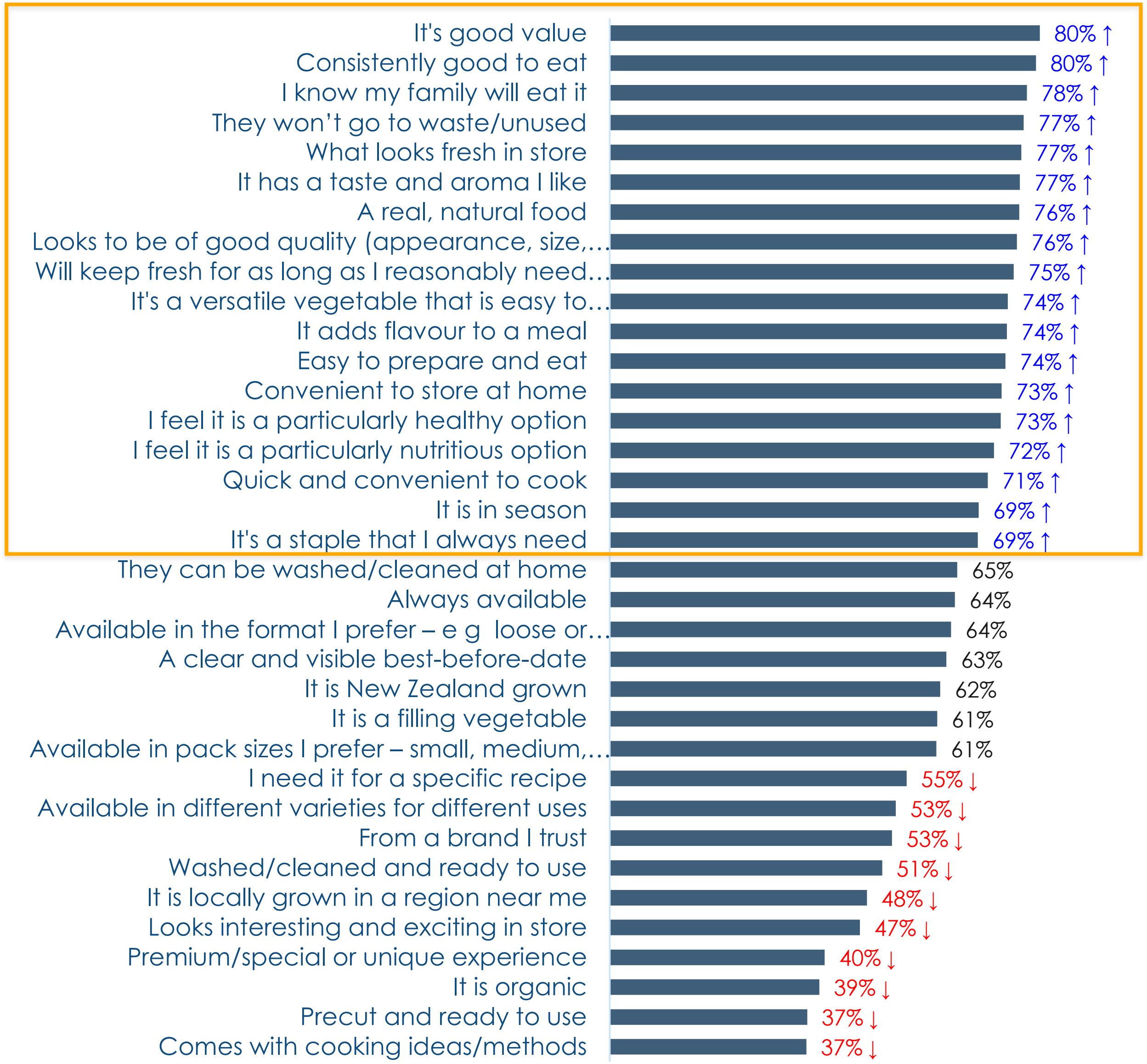
Choice drivers: How are people choosing which vegetables to buy?

- **Good value** and **consistency** top the list of choice drivers.
- Other drivers include **family preferences, freshness, flavour and taste, quality, nutrition/health and likelihood of consumption, which is also related to versatility, convenience and ease of preparation,.**

Top 2 boxes
(% of "important" and "very important"



Q: How important are the following criteria to you, when selecting vegetables to buy?

Statistical coding legend:
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N= 700

How do fresh potatoes perform against vegetable choice drivers?

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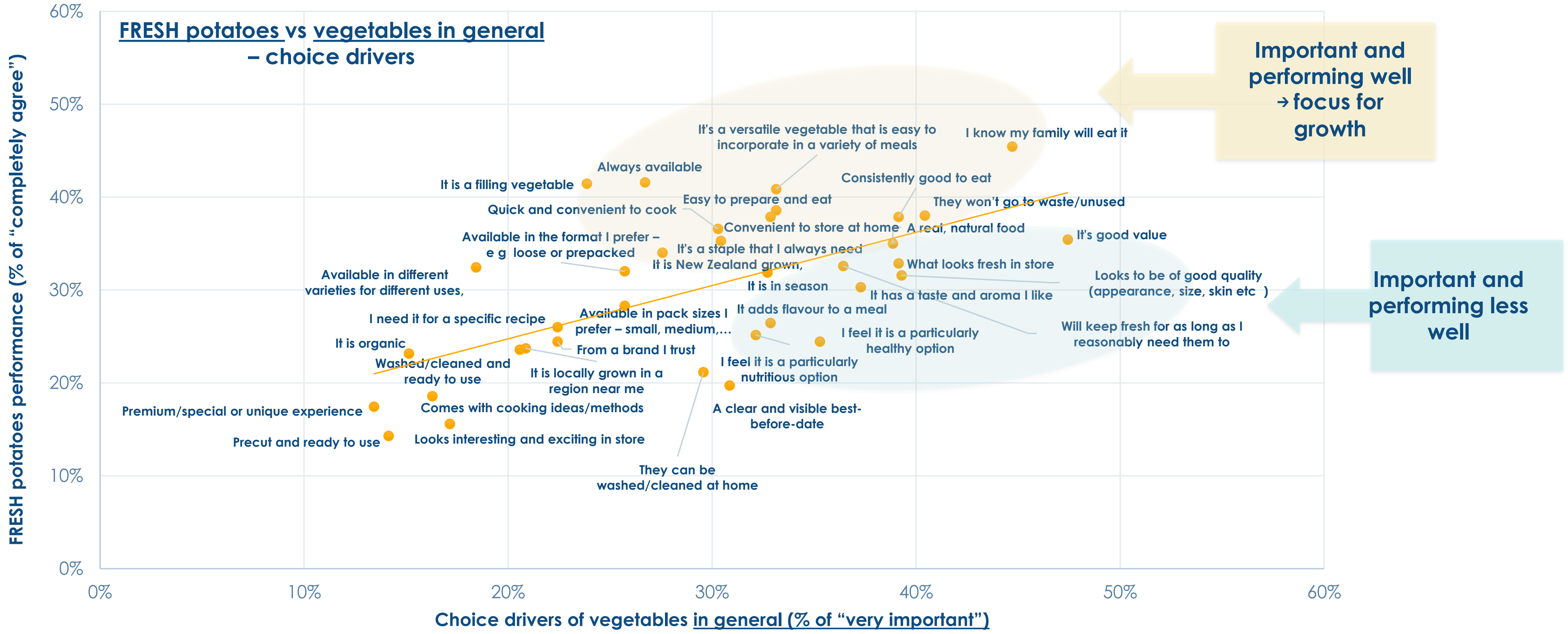
ABOVE vs BELOW the regression line

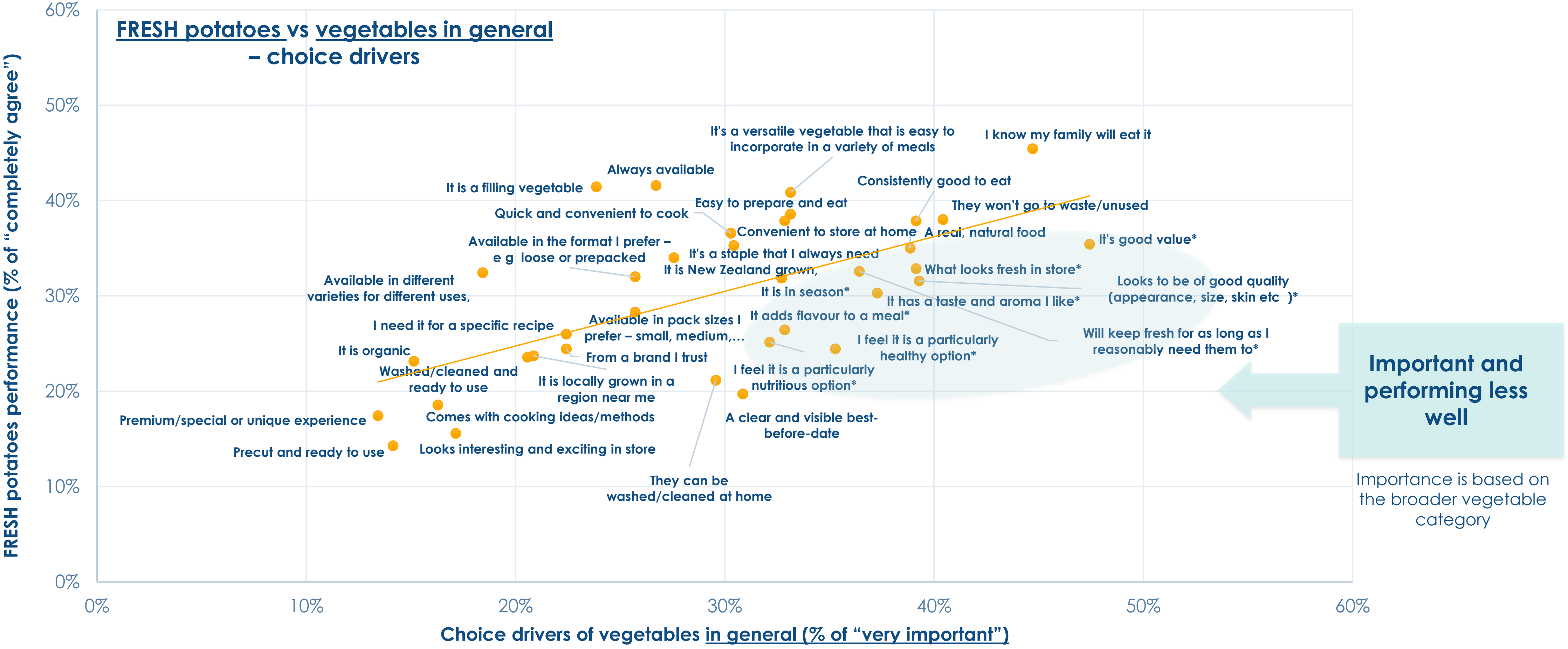
Areas above are those where fresh potatoes perform more strongly relative to the category average. Across these, it will be easier to drive product and brand growth.
Below the line, potatoes underperform as choices, relative to vegetables in general.



Q: How important are the following criteria to you, when selecting vegetables to buy?
Q: When it comes to buying FRESH potatoes where you normally shop, do you agree or disagree that potatoes ...

N=700

Areas to improve are perception of value, health and nutrition of fresh potatoes. Freshness and quality, including taste and flavour, could also be improved.



Importance is based on the broader vegetable category

Q: How important are the following criteria to you, when selecting vegetables to buy?
Q: When it comes to buying FRESH potatoes where you normally shop, do you agree or disagree that potatoes ...

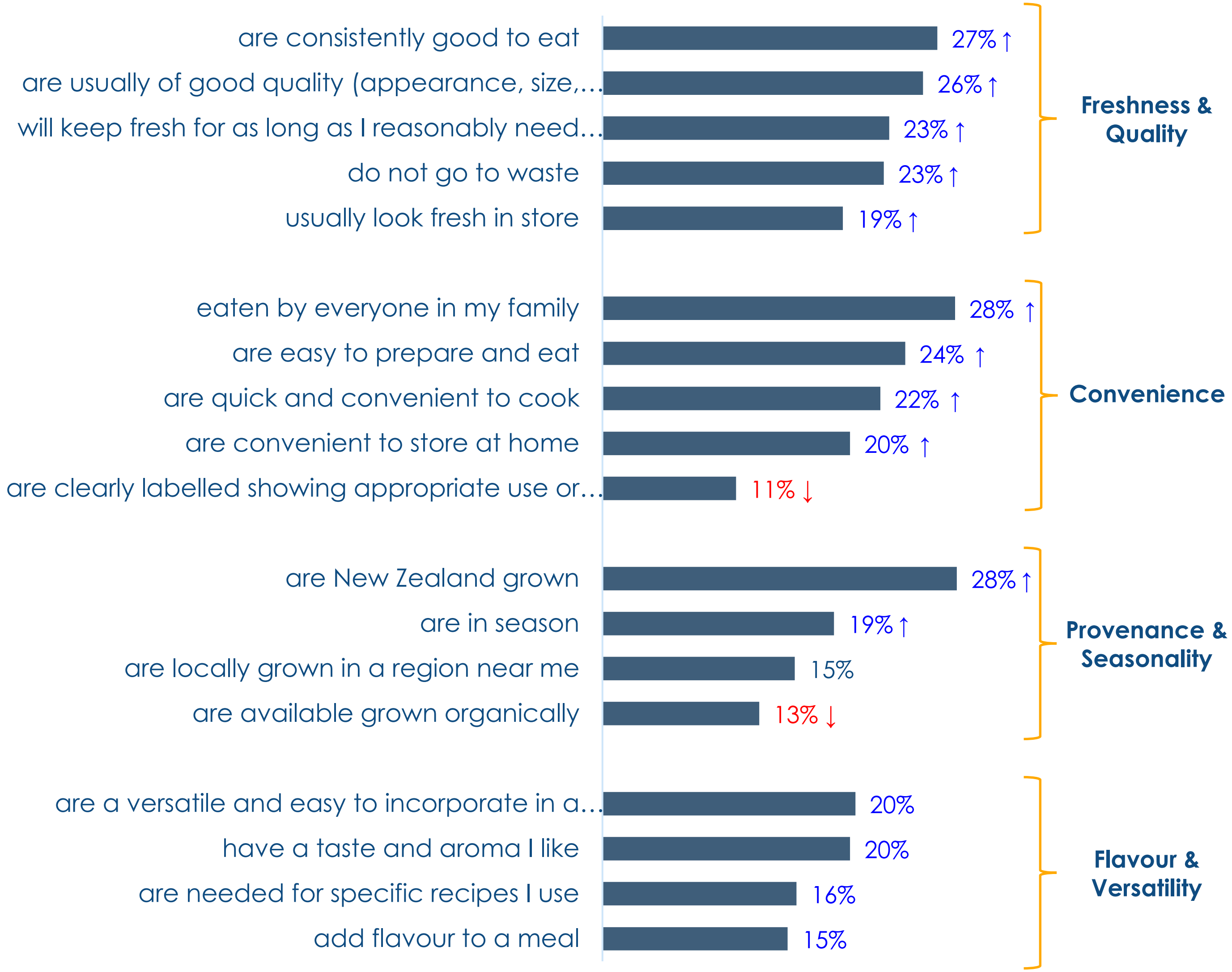
N=700

Lead drivers of premium perception

The key drivers of premium perception of potatoes generally aligned with drivers of vegetable choice, including

- Consistency
- Family acceptance and preference
- Freshness and quality
- Flavour and taste
- Versatility
- Convenience
- Ease of preparation

Provenance and seasonality may represent opportunities to elevate messaging on-pack.



Q: It is worth paying more for FRESH potatoes that….

Statistical coding legend:
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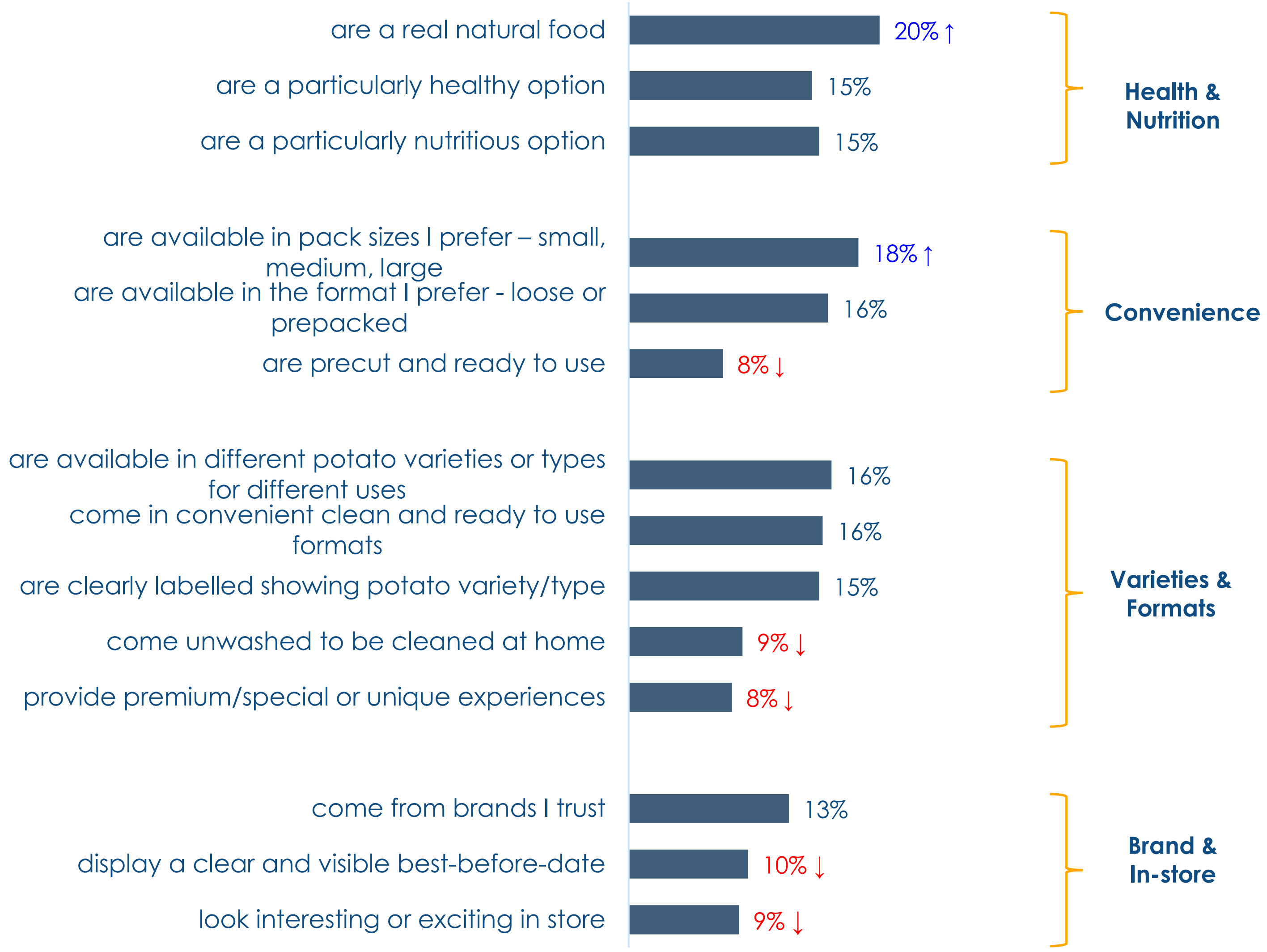
Lesser drivers of premium perception

Being particularly healthy or nutritious was not considered worth paying more for overall.

However, **significantly more participants consuming potatoes (nearly) every day considered health and nutrition worth paying more for**, compared to less frequent consumers.



Q: It is worth paying more for FRESH potatoes that….

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When asked unprompted, preparation, cook time and meal variety were the main barriers to consuming potatoes more often, as well as limiting carb intake.

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Fresh potato consumption barriers
unprompted

19% **Meal ideas and cooking time**
- Prep/cook time (12%)
- Prefer packaged/frozen (3%)

18% **Have/want variety**
- Have pasta/rice instead (6%)
- Eat kumara instead (5%)
- Don't have dishes with potatoes (4%)

17% **Not liked/don't want to**
- Don't want to eat more (7%)
- I don't like them so much (6%)
- Family doesn't like them (3%)

16% **Starch or carbohydrate content**
- Limiting carb intake (13%).
- Limiting starch/starchy veges (3%)

10% **Price and quality**
- Expensive/can't afford them (8%)

8% **Dietary restrictions**
- Restricted diet (me or family, often keto) (5%)

Q: Why do you not eat fresh potatoes more often?

N= 119 (Sample of potato consumers who consume potatoes less than once a week)

Barriers to consuming more fresh potatoes, prompted responses.

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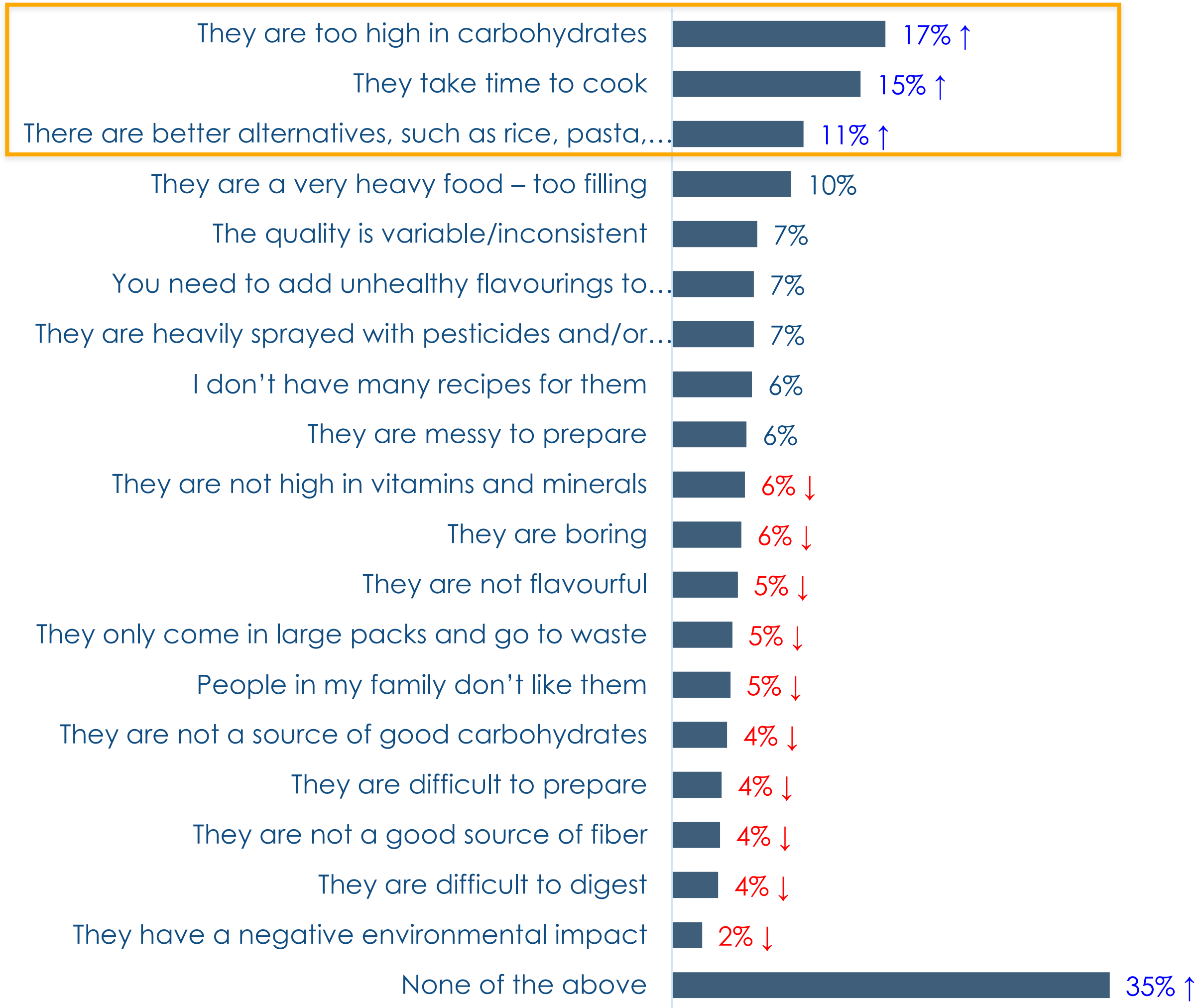
- When asked specifically, the greatest barriers to more fresh potato consumption are the perception that **they are too high in carbohydrates, that they take time to cook, and that there are better alternatives, such as rice, pasta, cauliflower, quinoa etc.**

  Those who considered potatoes too high in carbohydrate, significantly more often adhered to carbohydrate restrictive or intermittent fasting diets, while those who considered there to be better alternatives adhered to a low FODMAP diet significantly more.

- The alternatives offered in the examples, may address one or both of the main concerns, being either lower in carbohydrates, and/or quicker to cook.

- Of note, 35% of consumers did not consider there were any barriers to greater consumption. These consumers tended to not follow any restrictive diet and were older (significantly so for 70+ years).



Q: Which of the following factors stop you from consuming more FRESH potatoes, if any?

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N= 700

Rice, kumara and pasta were the most common substitutes for fresh potatoes

Alternatives to fresh potato tend to be high in carbs (rice, kumara, pasta, noodles and frozen potato products).

This substitution set suggests that fresh potatoes are generally considered a filling carbohydrate, rather than a vegetable.

Vegetable rice potentially provides a lower carb alternative to fresh potatoes and tends to be used more often by those who consider carbs a barrier to eating more fresh potatoes

	Total	High carbs a barrier (n=120)	High carbs NOT a barrier (n=580)
Rice	56% ↑	59%	55%
Kumara	52% ↑	57%	51%
Pasta	51% ↑	52%	51%
Noodles	40% ↑	46%	39%
Frozen potato products	32% ↑	32%	32%
Other fresh or frozen vegetable (e g carrot, pumpkin, squash, parsnip)	28%	26%	29%
Vegetable rice (e g cauliflower rice, broccoli rice)	20% ↓	27%	18%
Taro	11% ↓	8%	11%
Other grain (NOT rice or pasta)	8% ↓	7%	8%
None of the above	6% ↓	3%	7%

Q: Do you sometimes buy or use any of the following instead of FRESH potatoes?

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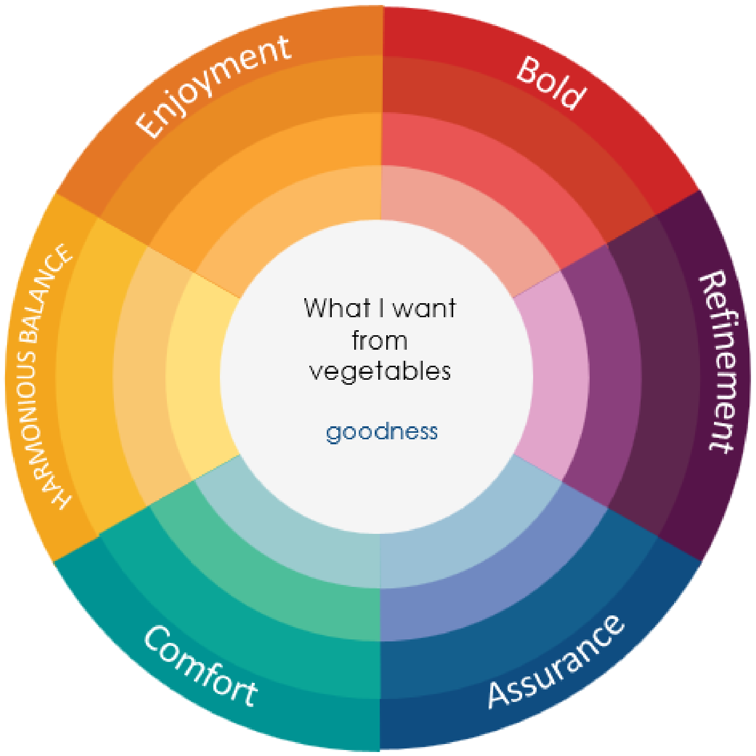
N= 700

FRESH POTATOES

Consumer demand spaces

A consumer needs vegetable framework to evaluate fresh potatoes



I select vegetables to ……..

- **Bold**
  Natures intensity
  …Bring the dish or moment to life - exciting, surprising with a burst of interest, full bold flavours
  …Add a feeling of fresh vitality Energetic, active, vibrant to get up and go
- **Refinement**
  Natures enhancement
  …Be the main attraction Show what can be done and create focus for the meal
  …Inspire and be creative - bringing something special and unique to elevate the meal or moment
- **Assurance**
  Natures goodness
  …Feel confident we are eating well and balancing a nutritious and healthy diet
  … Ensure we are eating safe natural fresh food
- **Comfort**
  Nature restoring
  … Provide familiar food that feeds the soul - comforting and enjoyed
  …Show care and generosity for others good food people really like
- **Balance**
  Natures balance
  That make life easy, simple and fit with our lives, reducing stress
  Provide balance - with options and variety so there is something for everyone
- **Enjoyment**
  Natures delight
  Celebrate the seasons, looking forward to something new
  That add a small moment of delight - interesting, different, deliciously tantalize the taste buds

Q: Thinking about vegetables and why you choose them or not, how much do you agree or disagree with the following statements?
Q: Thinking about FRESH potatoes specifically, which of the following statements best describe which benefits mushrooms provide?

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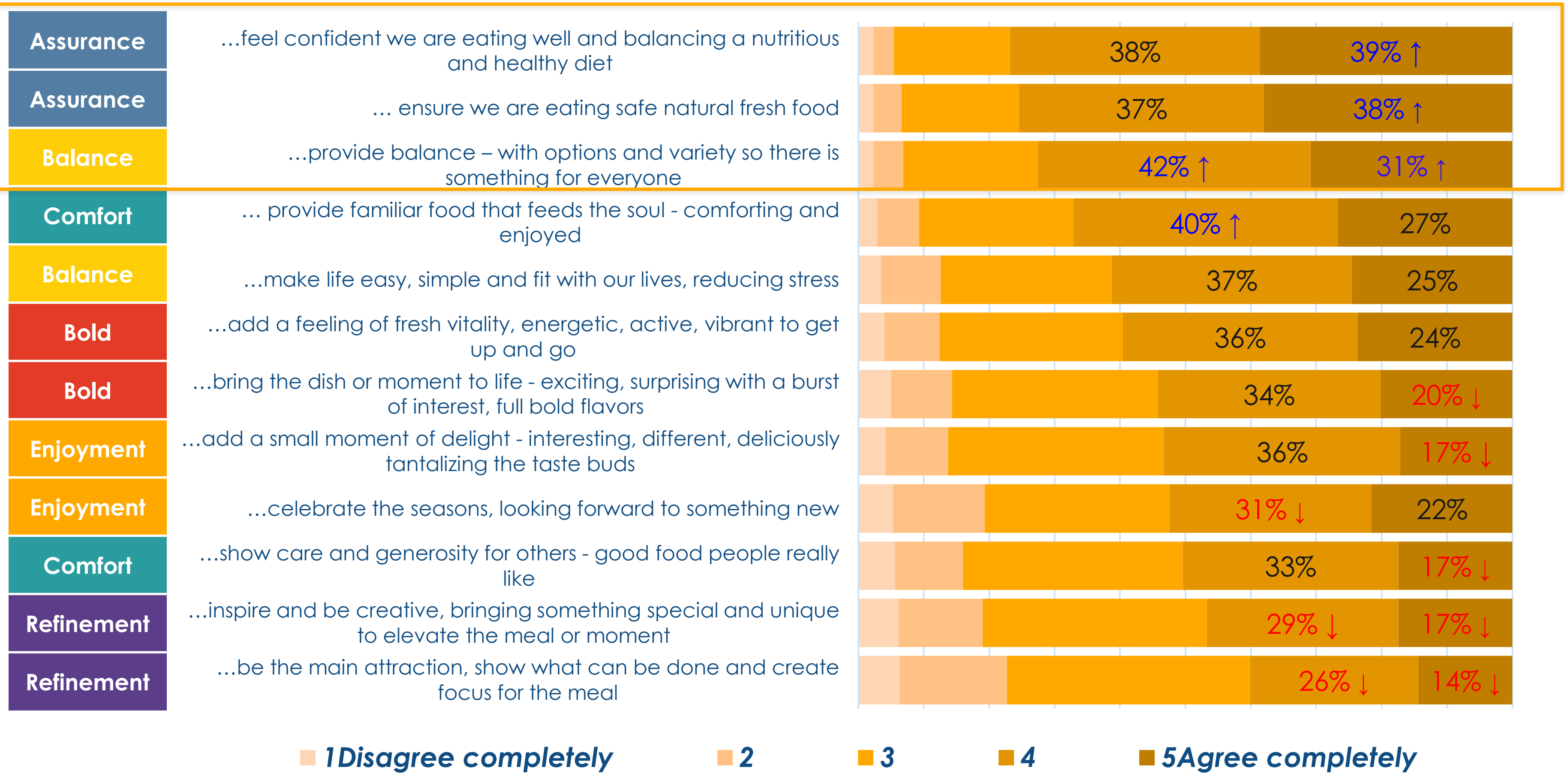
Consumer needs at the basis of VEGETABLE PURCHASING relate to a desire for natural, fresh, safe food that provides balance, nutrition and variety

I select vegetables to…



Q: Thinking about vegetables and why you choose them or not, how much do you agree or disagree with the following statements?

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N= 700

FRESH POTATOES fulfil more specific consumer needs, providing comfort and balance in a way that other vegetables do not

Fresh potatoes are **familiar and comforting**, whilst providing **balance to busy lives**, and – **assurance of a natural and healthy diet** for everyone

➢ potential areas for **proposition development**

FRESH POTATO BENEFITS / VEGETABLE NEEDS

FRESH POTATO BENEFITS		% selected	VEGETABLE NEEDS % of "completely agree"	
Comfort	Provide familiar food that feeds the soul - comforting and enjoyed	52% ↑	27%	Comfort
Balance	Provide balance – with options and variety so there is something for everyone	48% ↑	31% ↑	Balance
Balance	Make life easy, simple and fit with our lives, reducing stress	46% ↑	25%	Balance
Assurance	Ensure we are eating safe natural fresh food	40% ↑	37% ↑	Assurance
Assurance	Feel confident we are eating well and balancing a nutritious and healthy diet	39% ↑	39% ↑	Assurance
Enjoyment	Add a small moment of delight - interesting, different, deliciously tantalizing the taste buds	25% ↓	19% ↓	Enjoyment
Bold	Bring the dish or moment to life - exciting, surprising with a burst of interest, full bold flavors	24% ↓	20% ↓	Bold
Bold	Add a feeling of fresh vitality, energetic, active, vibrant to get up and go	20% ↓	24%	Bold
Enjoyment	Celebrate the seasons, looking forward to something new	20% ↓	24%	Enjoyment
Refinement	Inspire and be creative, bringing something special and unique to elevate the meal or…	19% ↓	17% ↓	Refinement
Refinement	Be the main attraction, show what can be done and create focus for the meal	18% ↓	14% ↓	Refinement
Comfort	Show care and generosity for others - good food people really like	18% ↓	17% ↓	Comfort

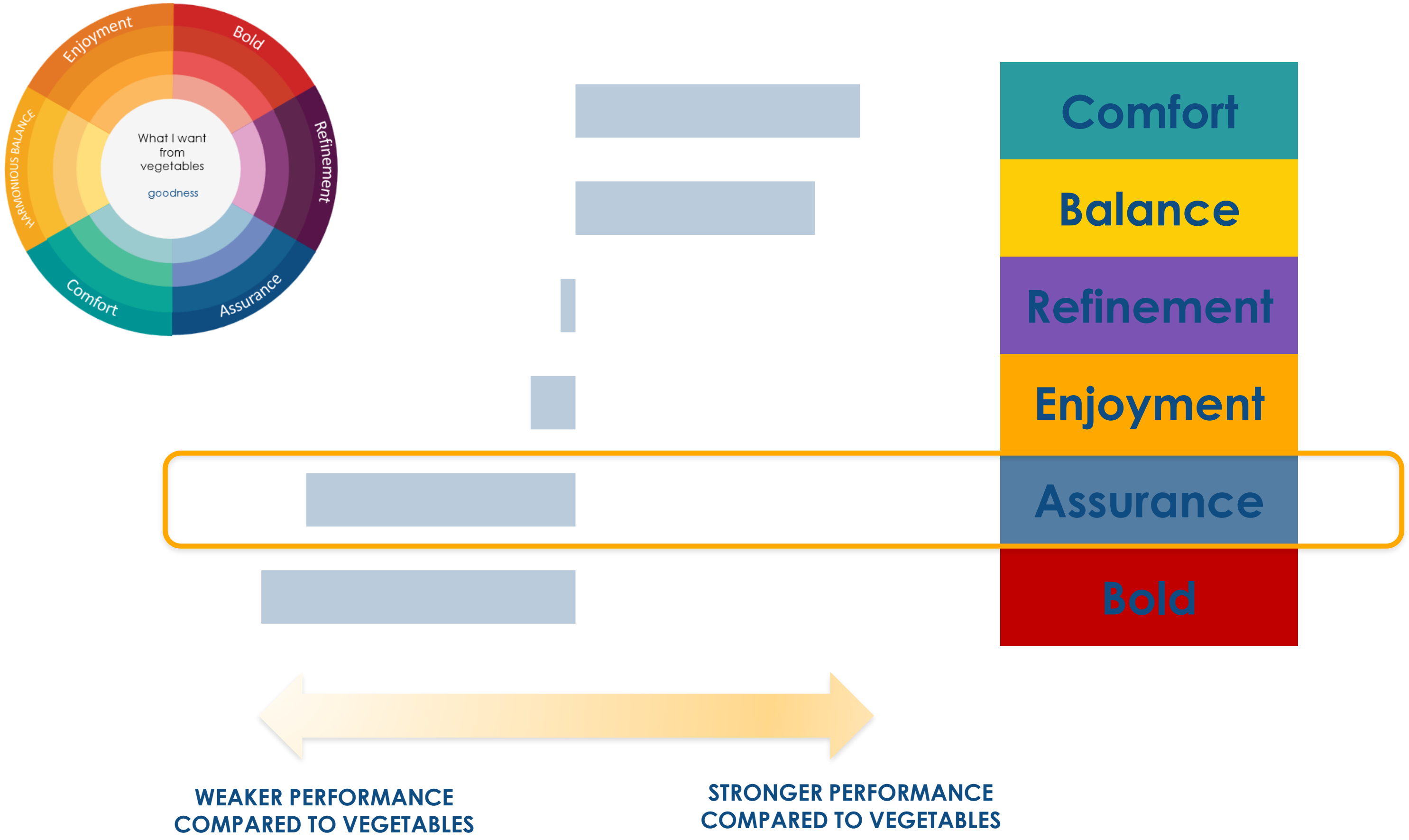
Fresh potatoes perform well against **the top 3 consumer needs** in the vegetable category, and serve additional needs

Q: Thinking about vegetables and why you choose them or not, how much do you agree or disagree with the following statements?
Q: Thinking about FRESH potatoes specifically, which of the following statements best describe which benefits fresh potatoes provide?

Statistical coding legend: Blue or ↑= Statistically high at 95% confidence level,
Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

N= 700

Relative to vegetables, potatoes more strongly fulfil needs of comfort and balance. Although potatoes contribute to assurance of eating safe, nutritious food, the fulfilment of this need is considerably weaker than vegetables, and represents an opportunity for improvement.



Q: Thinking about vegetables and why you choose them or not, how much do you agree or disagree with the following statements? Top box.
Q: Thinking about FRESH potatoes specifically, which of the following statements best describe which benefits fresh potatoes provide?

Enhancing delivery to the comfort, balance, bold and refinement need spaces may represent an opportunity to drive consumption frequency.

FORWARD

Less frequent potato consumers consider potato to deliver to the top comfort and balance benefits significantly less than very frequent consumers.

Less frequent potato consumers consider potato to bold and refinement benefits significantly less, perhaps considering potatoes lack the ability to bring something special to a dish or meal, highlighting an opportunity for engagement.

	FRESH POTATO BENEFITS	% selected	Fresh potato consumption frequency: 2 or more times a week	Fresh potato consumption frequency: *Less often
Comfort	Provide familiar food that feeds the soul - comforting and enjoyed	52% ↑	57% ↑	45% ↓
Balance	Provide balance – with options and variety so there is something for everyone	48% ↑	55% ↑	40% ↓
Balance	Make life easy, simple and fit with our lives, reducing stress	46% ↑	25%	42%
Assurance	Ensure we are eating safe natural fresh food	40% ↑	37%	39%
Assurance	Feel confident we are eating well and balancing a nutritious and healthy diet	39% ↑	39%	35%
Enjoyment	Add a small moment of delight - interesting, different, deliciously tantalizing the taste buds	25% ↓	19%	21%
Bold	Bring the dish or moment to life - exciting, surprising with a burst of interest, full bold flavors	24% ↓	28% ↑	20%
Bold	Add a feeling of fresh vitality, energetic, active, vibrant to get up and go	20% ↓	24%	17%
Enjoyment	Celebrate the seasons, looking forward to something new	20% ↓	24%	16%
Refinement	Inspire and be creative, bringing something special and unique to elevate the meal or…	19% ↓	31% ↑	15%
Refinement	Be the main attraction, show what can be done and create focus for the meal	18% ↓	14%	14%
Comfort	Show care and generosity for others - good food people really like	18% ↓	17%	14%
			n=399	n=278

Q: Thinking about FRESH potatoes specifically, which of the following statements best describe which benefits fresh potatoes provide?
** "Less often" is defined as respondents who consume fresh potatoes once a week to once every 2-3 months*

Statistical coding legend: Blue or ↑= Statistically high at 95% confidence level,
Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

N= 700

Prevailing **fresh potato traits**

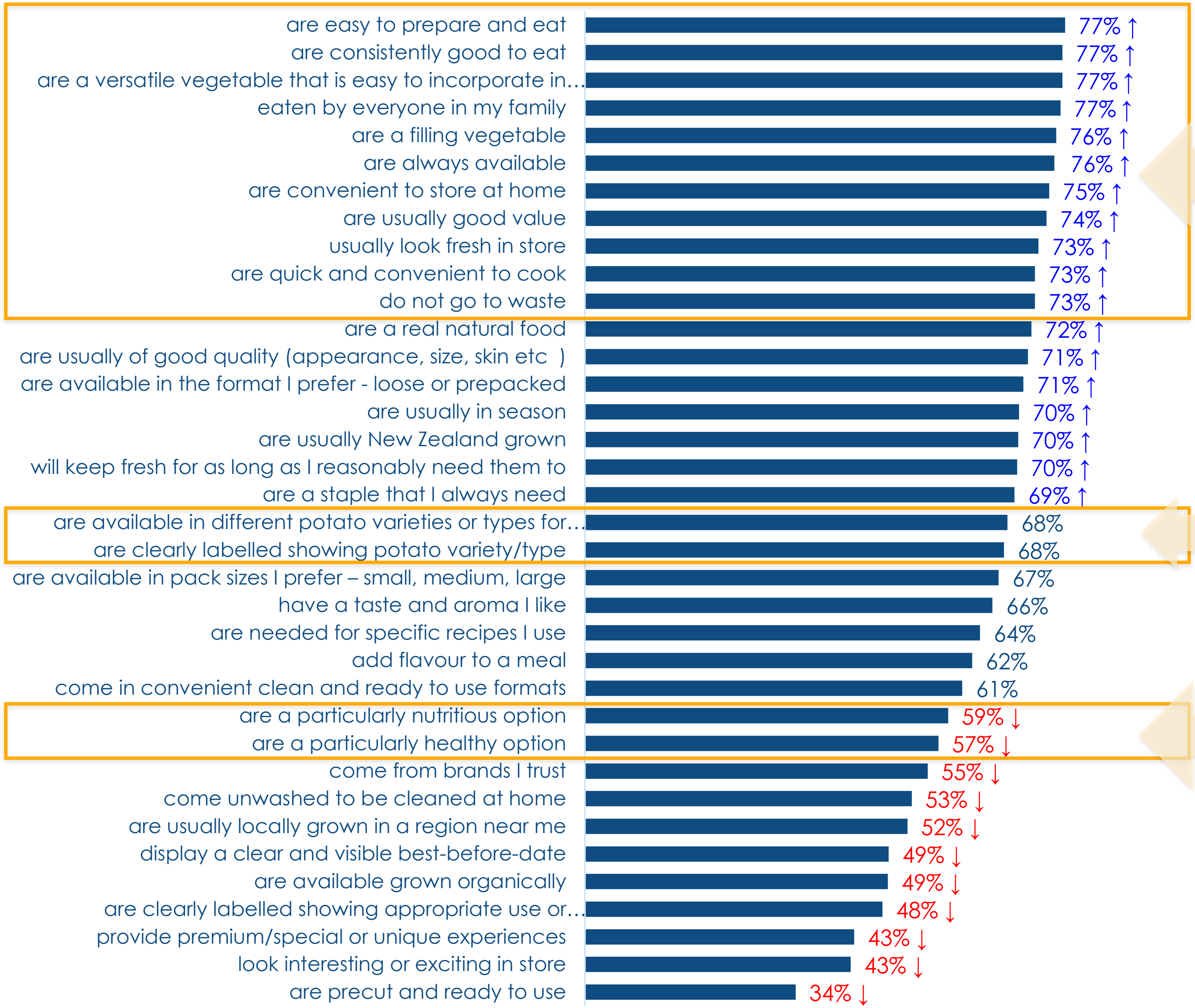
Fresh potato traits deliver well to the comfort and balance needs

- ➢ Eaten by everyone
- ➢ Always good to eat
- ➢ Convenient to buy, store and cook

Elevating knowledge of the health/nutrition benefits of potatoes may offer an important opportunity to grow the category, to better serve the assurance need.

Elevating the presence and benefits of different varieties, including different taste profiles may better serve the bold and refinement needs.

FRESH potatoes…



Fit with comfort and balance needs

Elevating varieties may be an opportunity

Under-performing on perceived health and nutrition, contributors to assurance need

Q: When it comes to buying fresh potatoes where you normally shop, do you agree or disagree that they …
Top 2 box data is presented (4 and 5 on a 5 point category scale; 1 = disagree completely, 5 = agree completely.

Statistical coding legend: Blue or ↑= Statistically high at 95% confidence level,
Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

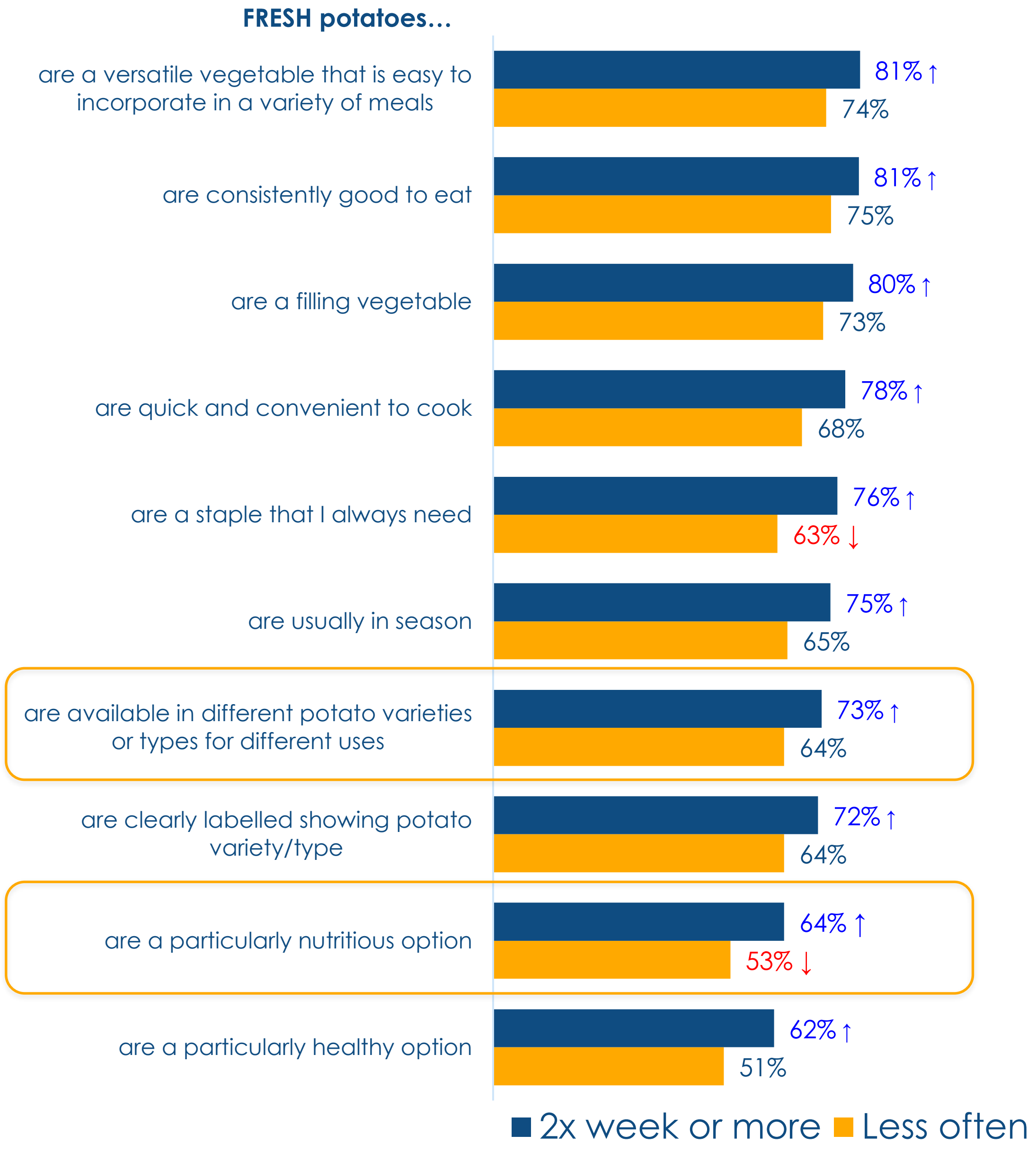
N= 700

Perception of fresh potato traits by very frequent and less frequent eaters

Gaps in perception are evident for all statements, with frequent eaters responding more positively.

One key difference is significantly **greater acknowledgement from frequent consumers of potato varieties and different uses.** However, there was no significant difference between the types/varieties typically purchased by very and less frequent eaters (data not shown). **This may suggest an unmet need, even for frequent potato consumers.**

There was also greater acknowledgment by very frequent eaters that potatoes are nutritious and healthy, **further evidence that enhancing consumer knowledge on the health and nutritional benefits of fresh potatoes is likely to drive greater consumption.**



Q: When it comes to buying fresh potatoes where you normally shop, do you agree or disagree that they …
Top 2 box data is presented (4 and 5 on a 5 point category scale; 1 = disagree completely, 5 = agree completely.

Statistical coding legend: Blue or ↑= Statistically high at 95% confidence level,
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N= 700

FROZEN POTATO PRODUCTS

Category drivers and barriers

Consumption behaviours

FROZEN POTATO PRODUCTS

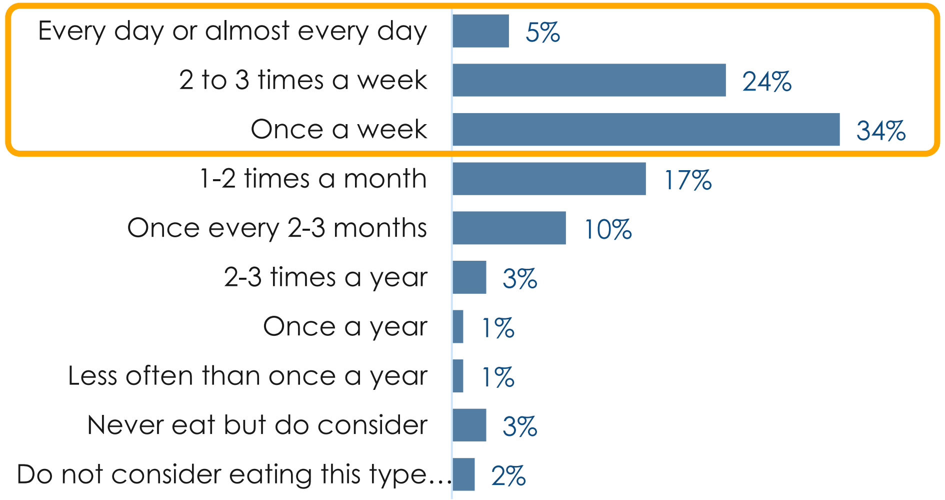
Consumption behaviours

FORWARD

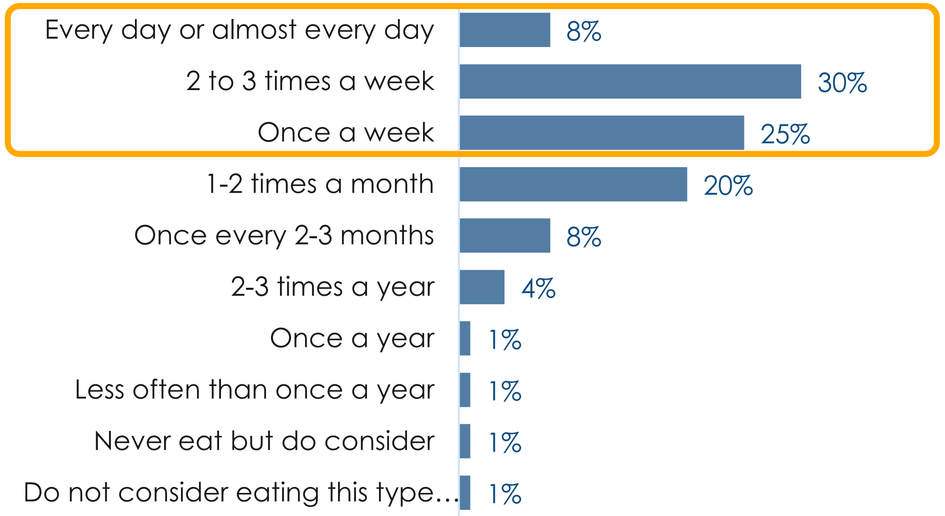
63% of respondents cook and consume frozen potato products and frozen vegetables at least once a week.

There is opportunity to grow compared to vegetables by increasing frequency from once a week.

Frozen potato products consumption frequency
(e.g. chips, wedges, hash browns, roasties etc)



Frozen vegetables consumption frequency
(e.g. peas, corn, carrots, mixed veg, spinach, cauliflower rice etc)



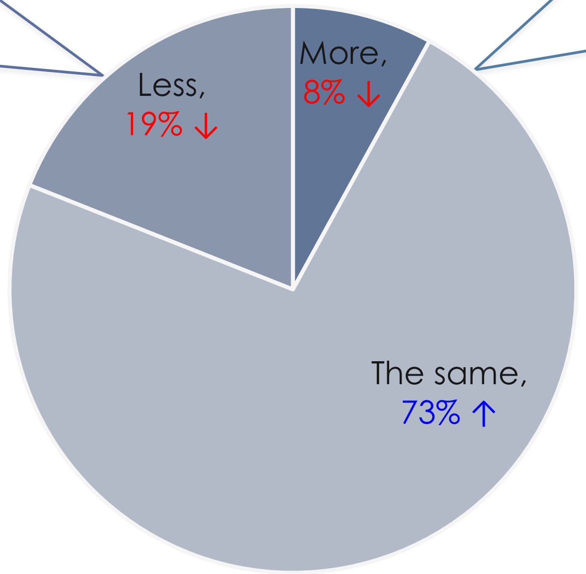
Q: How often do you usually EAT or COOK with the following FROZEN products?
N= 700 (Sample of potato consumers)

Statistical coding legend:
Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

Most people are consuming the same amount of frozen potato products as in the past. Increased consumption is being driven by largely by convenience, price and liking of products.

Why? (n=134)
- Prefer fresh (prefer fresh, taste, prepare how I like, more nutritious) (41%)
- Dietary considerations (restrict carbs, unhealthy/fattening, trying to eat healthier, healthier options available) (25%)
- Price/limited resources (more expensive than fresh, limited freezer space, cost of electricity) (19%)
- Don't like frozen potatoes (don't like them, not as nutritious, poor texture) (13%)
- Gone off them/got no need for them (10%)

Are you consuming more, less or the same frozen potato products than ever before?



Why? (n=54)
- Convenience (easy/quick to prepare, easy with air fryer, bulk buy, keeps in freezer for longer, always available) (63%)
- Price (cheap, cheaper than fresh, price discounts) (22%)
- I like them (like them, good brands available, better quality, consistent flavour) (19%)
- Options and varieties available (incl. for breakfast, add texture to a meal) (9%)
- For kids (children and grandchildren) (6%)

Q: Are you consuming more, the same, or less FROZEN potato products than ever before?
Q: Why is that?

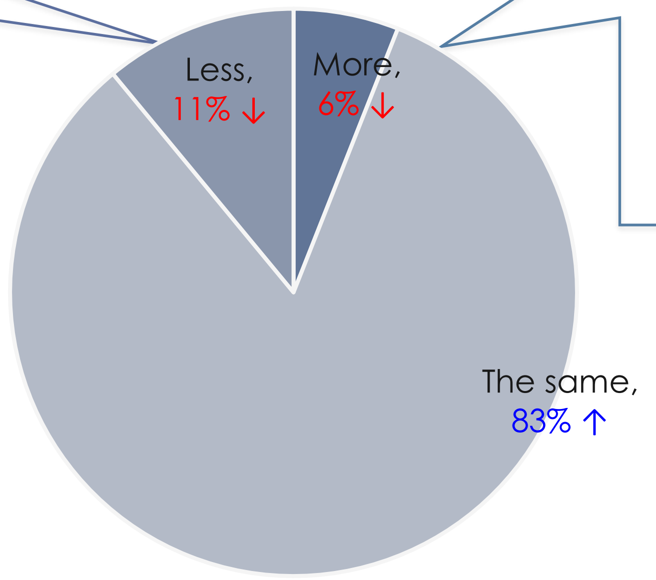
Statistical coding legend:
Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

N=700 potato consumers

In the future, consumption is likely to remain static, although for those who intend to eat more frozen potato products, the drivers are convenience, price and liking, both individually and by growing families.

Why? (n=37)
- Reducing carb intake (14%)
- Eating healthier (14%)

In the future, do you intend to consume more, the same, or less frozen potato products?



Why? (n=42)
- Convenience (easy/quick to prepare, easy to store, lasts longer)(40%)
- Price/value (21%)
- I like them/good quality (19%)
- Good for a growing family (kids like them, to satisfy appetites, good as a snack) (19%)
- To try new things/recipes (10%)

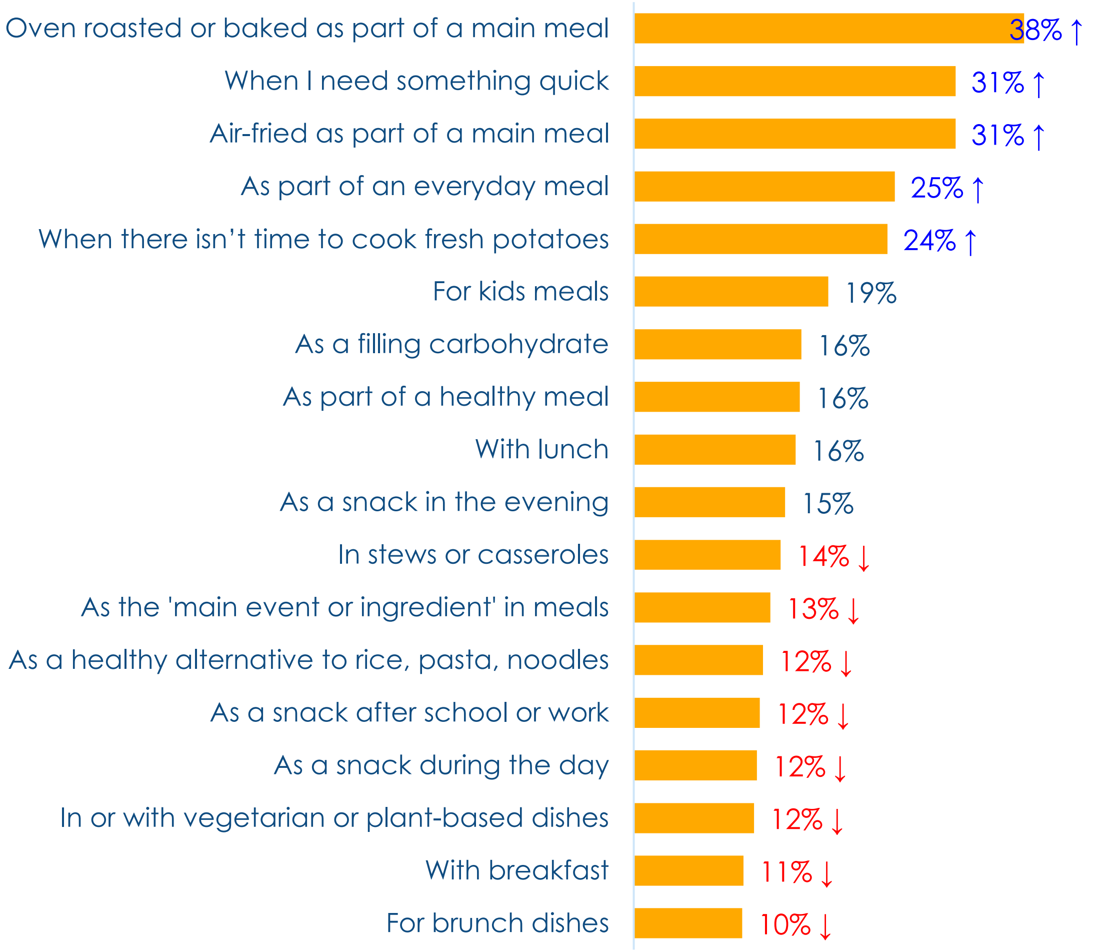
Q: In the future, do you intend to consume more, the same, or less FROZEN potato products?
Q: Why is that?

Statistical coding legend:
Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

N=700 potato consumers

Frozen potato products are generally used baked as part of a main meal, often an everyday meal, and when time is short.

Less common consumption occasions include as a healthy alternative to rice/pasta/noodles, as a snack, as a main ingredient or in plant-based dishes, or for breakfast or brunch.

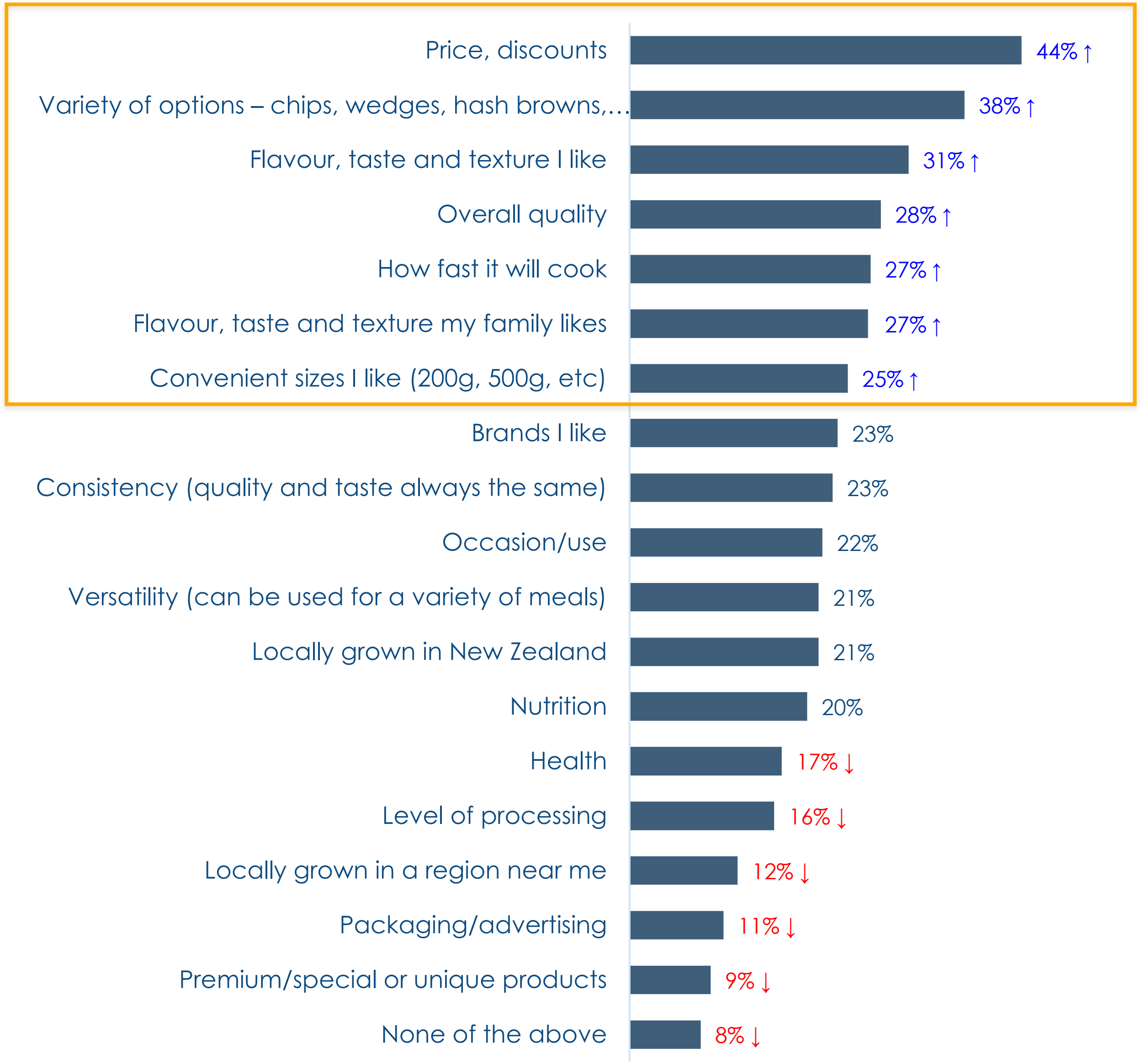


Q: In which occasions or situations do you generally prepare, cook or eat FROZEN potato products?

FROZEN POTATO PRODUCTS

Category drivers and barriers

Choice drivers: How are people choosing which frozen potato products to buy?



The drivers of buying frozen potato products suggest they are chosen as a cost-effective and convenient option, rather than a healthy option that offers something special.

Q: Which of the following do you consider important when thinking about buying FROZEN potato products?

Statistical coding legend:
Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

N= 700

When asked unprompted, a preference for fresh potatoes, benefits of fresh potatoes and health reasons were the main barriers to consuming more frozen potato products.

FORWARD

Frozen potato product consumption barriers

32%	**Prefer fresh**	•Prefer fresh potatoes (30%) •Eat fresh when in season (2%)
23%	**Health reasons**	•Not healthy (13%) •High carbs/starchy (4%) •On a diet/doesn't fit in my diet (2%) •Too fattening/high calorie (2%) •Additive concerns (1%) •Healthier options available (1)
11%	**Benefits to fresh potatoes**	•Cheaper (5%) •Readily available (2%) •Make my own wedges etc (2%) •Not hard to cook, don't take as long (1%) •Like whole potatoes (1%)
10%	**Limited versatility and barriers to cooking**	•Eat rice or other things, like variety (5%) •Only use when short of time/ideas (2%) •An occasional treat (2%)
10%	**Don't like them**	•Don't like them (7%) •Soggy, poor and inconsistent texture (2%) •Not as good as restaurant/takeaway (1%)
7%	**Cost/limit to resources**	•Too expensive (4%) •Not enough room in the freezer (2%) •No oven, too expensive to run oven (1%)

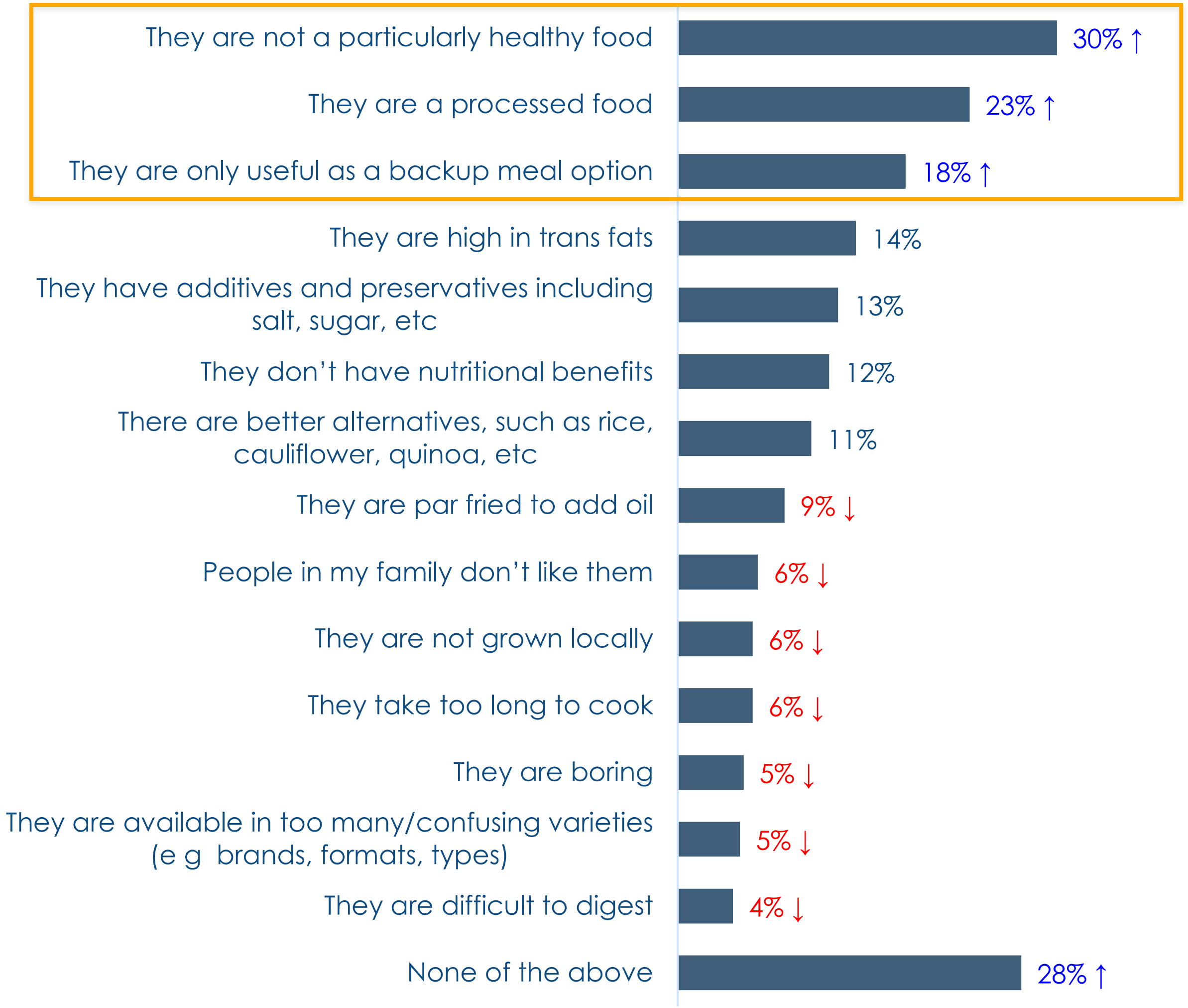
Q: Why do you not eat frozen potato products more often?

N= 259 (Sample who consume frozen potato products less than once a week)

Barriers to consuming more frozen potato products, prompted responses.

FORWARD

- When asked specifically, the greatest barriers to more frozen potato product consumption are the perception that **they are not a particularly healthy food, they are processed, and that they provide a back-up meal option only.**
- **Females were significantly more likely to consider health aspects** (not healthy, processed, high in trans fat, no nutritional benefits) as a barrier, as well as frozen potato products being useful as a back up meal option only.
- **Younger people (aged 20-29%) were also significantly more likely to consider frozen potato products as not particularly healthy.**
- Of note, 28% of consumers did not consider there were any barriers to greater consumption.



Q: Which of the following factors stop you from consuming more FROZEN potato products, if any?

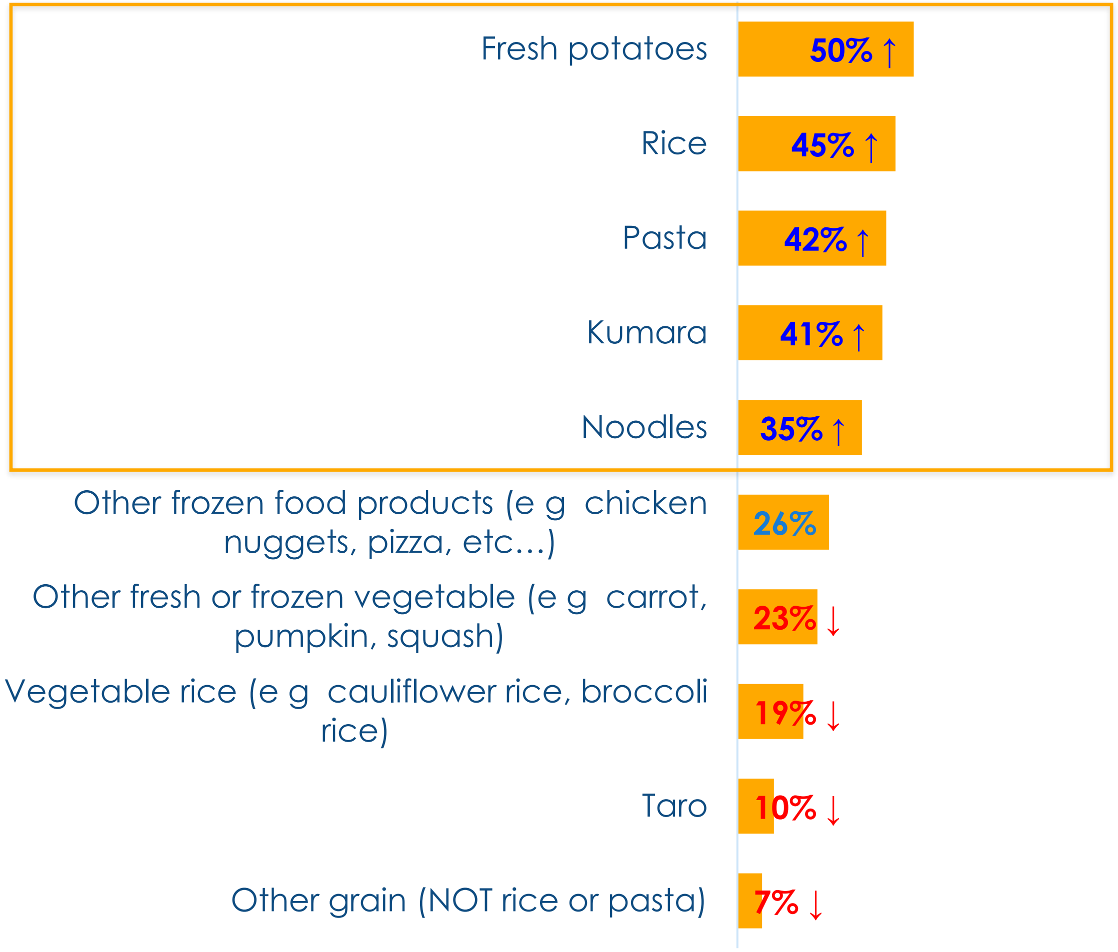
Statistical coding legend:
Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

N= 700

Fresh potatoes, rice, pasta, kumara and noodles were the most common substitutes for frozen potato products

The main barrier to frozen potato product consumption was that they are processed and not particularly healthy. It follows then, that frozen potato products **maybe substituted by fresh potatoes or kumara, and potentially rice** (with brown rice being minimally processed).

The substitution set suggests that frozen potato products are considered a filling carbohydrate, rather than a vegetable.



Q: Do you sometimes buy or use any of the following instead of FROZEN potato products?

Statistical coding legend:
Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

N= 700

POTATO CRISPS

Purchase consumption and frequency

Drivers of consumption

Barriers to consumption

Potato crisps are the most commonly consumed savoury snack amongst New Zealanders

Although 64% of respondents consume potato crisps weekly, there may be an **opportunity to increase consumption frequency from once or twice a month to more often.**

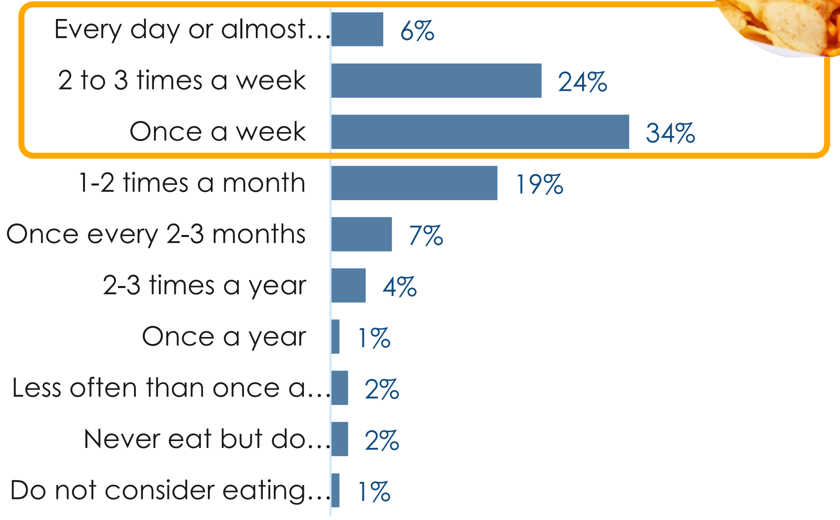
For other snacks, consumption of once or twice a month was most common, and there may also be an opportunity to convert these consumers to potato crisps.

Savoury snack cupboard ranking

Based on % weekly users

1	64% ↑	Potato chips/crisps
2	36%	Corn chips
3	36%	Packaged salted or flavoured nuts
4	29% ↓	Popcorn
5	44% ↓	Packaged pretzels, corn snacks etc

Potato chips/crisps consumption frequency



Q: When in season or easily available, how often do you usually EAT or COOK WITH these vegetables?
N= 700 (Sample of potato consumers)

Statistical coding legend:
Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

FORWARD

Chips/crisps being unhealthy, high in salt, fat and carbs, and intentions to eat healthy are the main barriers to eating more of them.

Potato chips/crisps
consumption barriers
unprompted

29% **Unhealthy/non-nutritious**
- Not good for you / unhealthy (27%)
- Non-nutritious / empty calories(2%)

19% **Trying to be healthy / manage weight**
- Limit consumption for health / trying to lose or not gain weight(9%)
- They are fattening (4%)
- Trying to eat healthier alternatives (3%)
- Avoid them, because once you start you can't stop (1%)

18% **High salt / fat / carbs**
- Too much fat / too greasy (9%)
- Too much salt (7%)
- High carbohydrate (4%)

18% **Don't like them / don't want to eat them more**
- Don't like them (8%)
- Don't want/need to eat more / I eat enough of them (10%)

9% **Expensive**
- They are expensive / outside of our budget / poor value for money (9%)

8% **Prefer other snacks**
- Prefer other snacks or a variety of snacks (5%)
- Prefer corn chips (1%)
- Have more of a sweet tooth (1%)

5% **They are a treat or only for special occasions**
- Just like them for a change (2%)
- Only have them with guests or for a special occasion(2%)

Q: Why do you not eat potato chips/crisps more often?

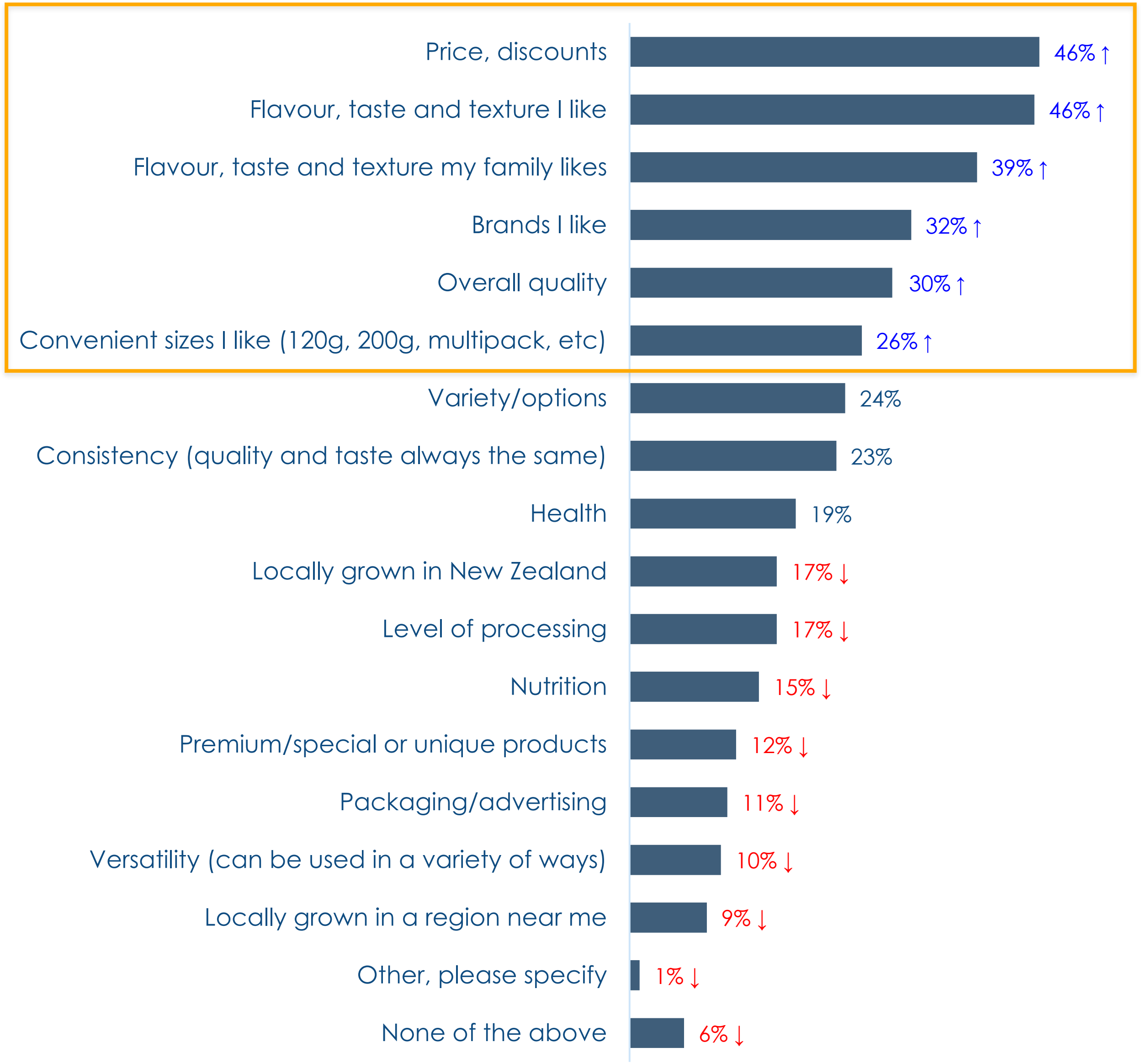
N= 250 (Sample who consume potato crisps/chips less than once a week)

Choice drivers: How are people choosing which potato chips/crisps to buy?

- **Price or promotions, and liked flavours, textures and brands** were the main drivers when deciding which chips/crisps to buy.
- **Overall quality, and convenient size packs** were also key drivers of choice.

Together, these suggest chips/crisps are chosen as a tasty/indulgent, cost-effective and convenient option, rather than a healthy option that offers something special.

The drivers of chips/crisps were very similar to those for frozen potato products.



Q: Which of the following do you consider important when thinking about buying potato chips/crisps?

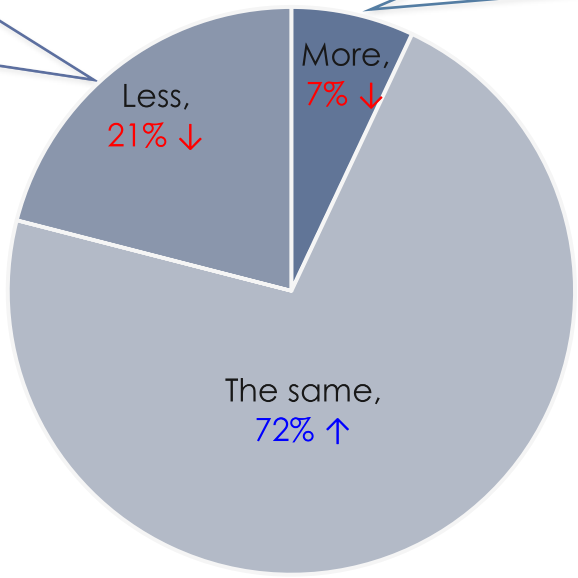
Statistical coding legend:
Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

N= 700

Most people are consuming the same amount of chips/crisps as in the past, with health being a large barrier to consuming more. Increased consumption is attributable to chips/crisps being liked by the whole family, and a convenient snack for many occasions.

Are you consuming more, less or the same potato chips/crisps than ever before?

Why? (n=144)
- Not healthy/nutritious / too salty/fatty/high carb / processed (39%)
- Trying to eat healthier / lose weight / cut back on snacks (30%)
- Price / not within budget (16%)
- Don't like/want/buy them / losing their appeal to me (14%)
- Prefer other/healthier snacks (8%)



Why? (n=51)
- I like them/whole family likes them (25%)
- Convenient snack for school lunches, socialising, watching TV or as a treat (22%)
- Taste, texture and quality (20%)
- Price/cheap/often discounted (16%)
- Variety of flavours and types available (14%)

Q: Are you consuming more, the same, or less potato chips/crisps than ever before?
Q: Why is that?

Statistical coding legend:
Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

N=700 potato consumers

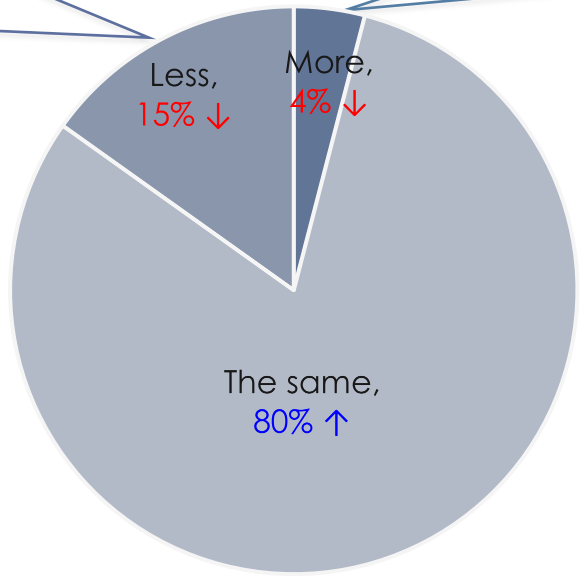
FORWARD

In the future, consumption is likely to remain static, although for those who intend to eat more potato chips/crisps, the drivers are being liked by everyone in household and considered a convenient snack.

Perception of chips/crisps being unhealthy and greater consideration for health are key barriers to eating more crisps in the future.

Why? (n=108)
- Trying to eat healthier / lose weight / cut back on snacks (40%)
- Not healthy/ too salty/fatty/high carb not nutritious (35%)
- Cost / not within budget (14%)
- Family not interested / don't like/eat/buy them (8%)

In the future, do you intend to consume more, the same, or less potato chips/crisps?



Why? (n=30)
- I like them/ family likes them / good for kids snacks (63%)
- Easy/convenient snack/packaging (20%)
- Quality / flavours and types available (13%)
- Price / frequent discounts (13%)

Q: In the future, do you intend to consume more, the same, or less potato chips/crisps?
Q: Why is that?

Statistical coding legend:
Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

N=700 potato consumers

APPENDIX

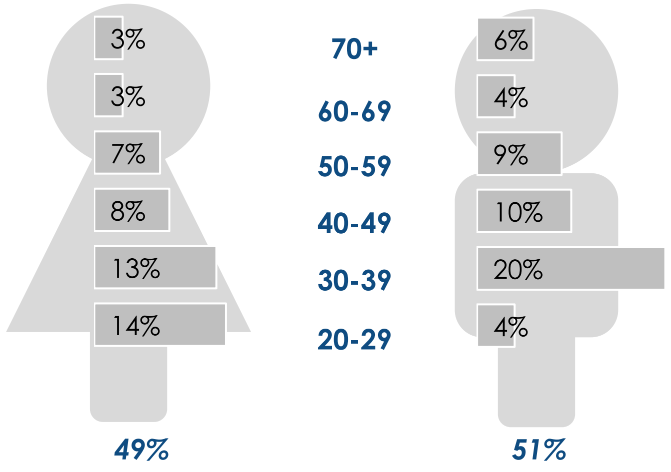
SAMPLE COMPOSITION

CONSUMPTION FREQUENCY BY REGION, ETHNICITY AND INCOME

Sample composition (*N=700*)

FORWARD

AGE & GENDER
Total%

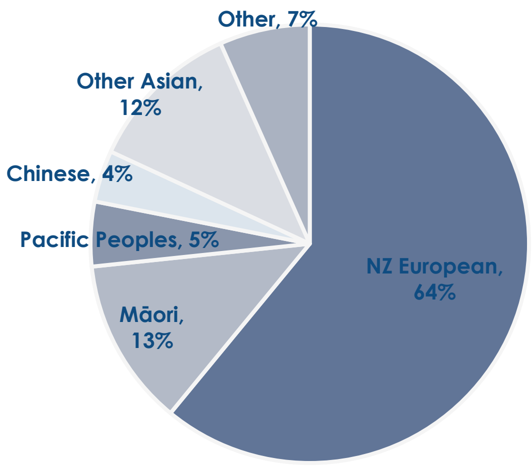


SHOPPING DECISION

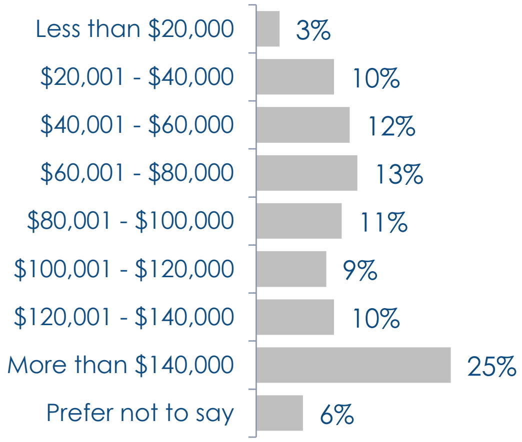
HOUSEHOLD MAKEUP

	Average number in the household
Adults older than 60 y	0.6
Adults aged 19-60 y	2.1
Young people aged 13-18 y	0.3
Children/babies younger than 13 y	0.7
Average total	3.2

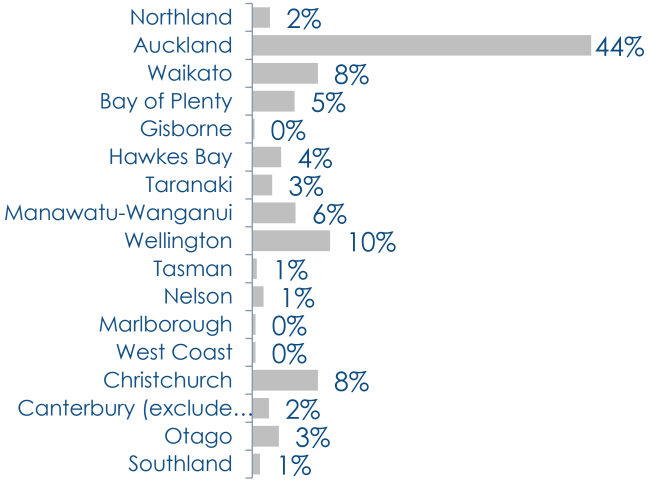
ETHNICITY



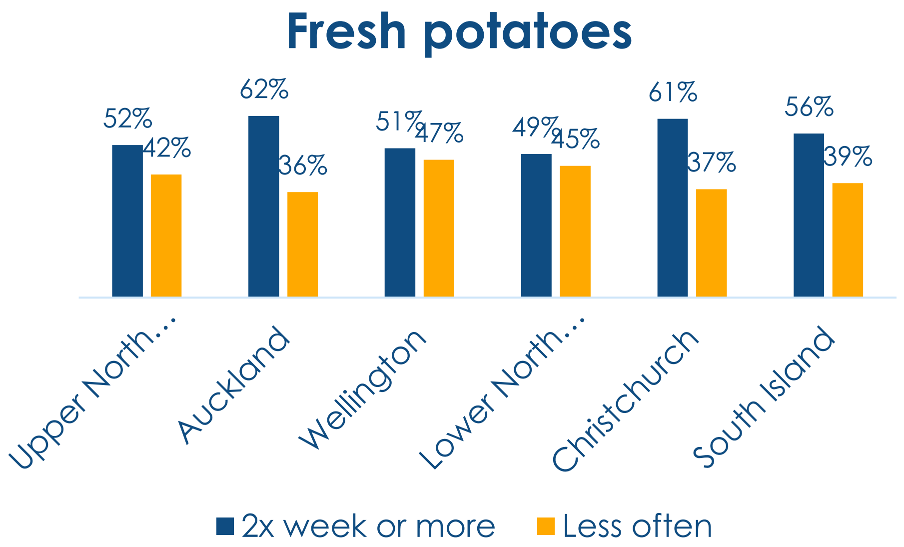
ANNUAL HOUSEHOLD INCOME

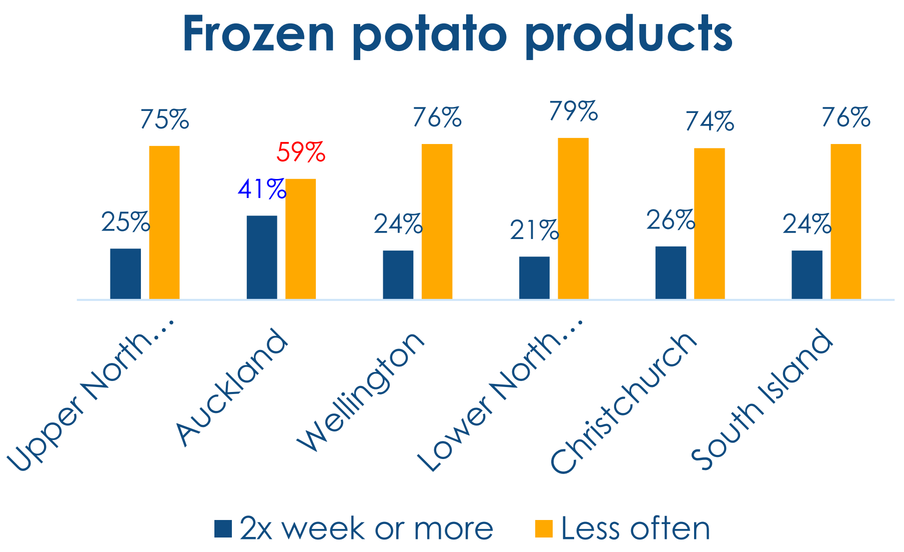


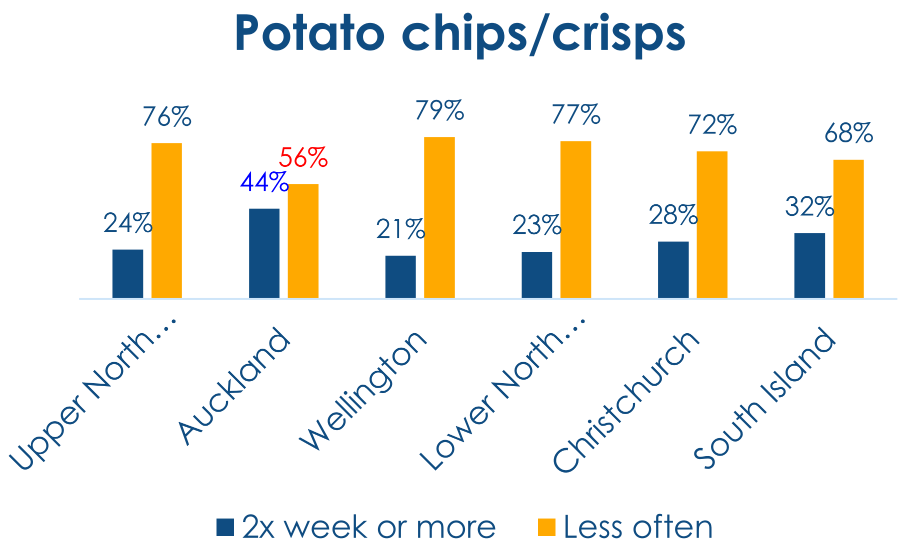
REGION



Consumption frequency – by region



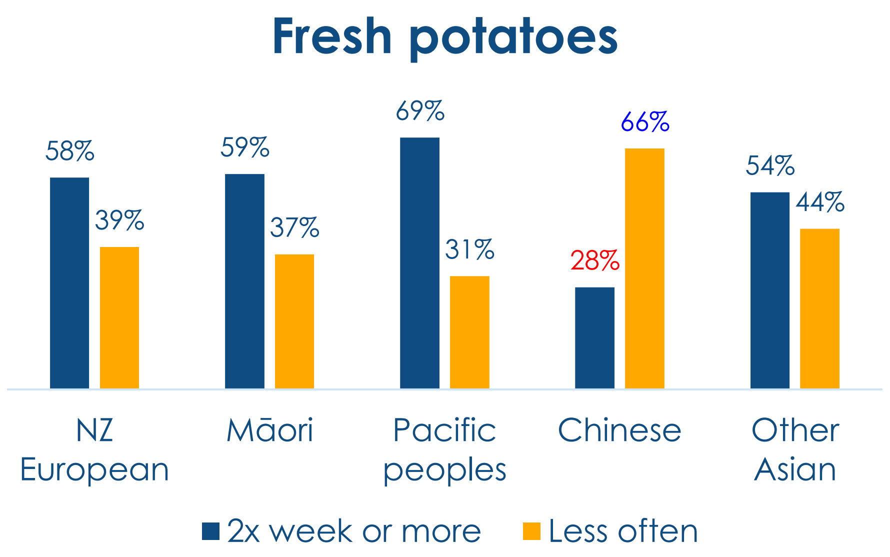


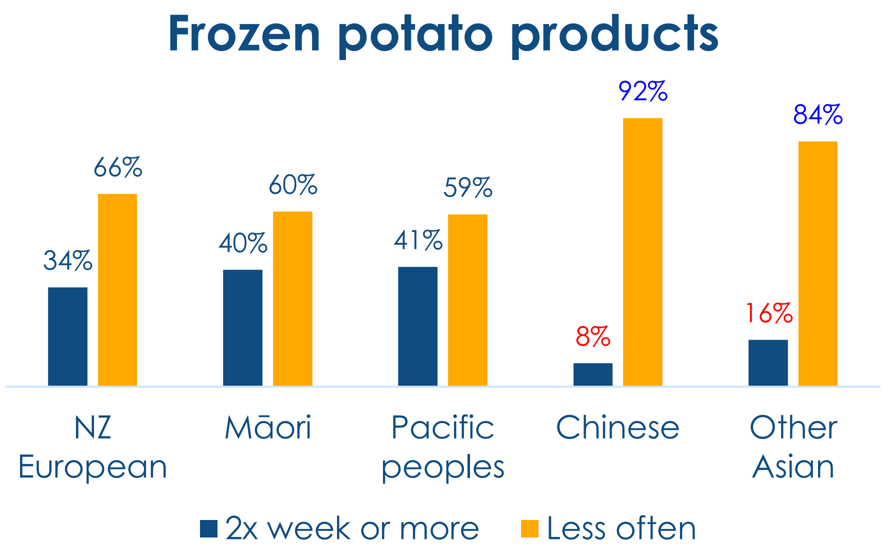


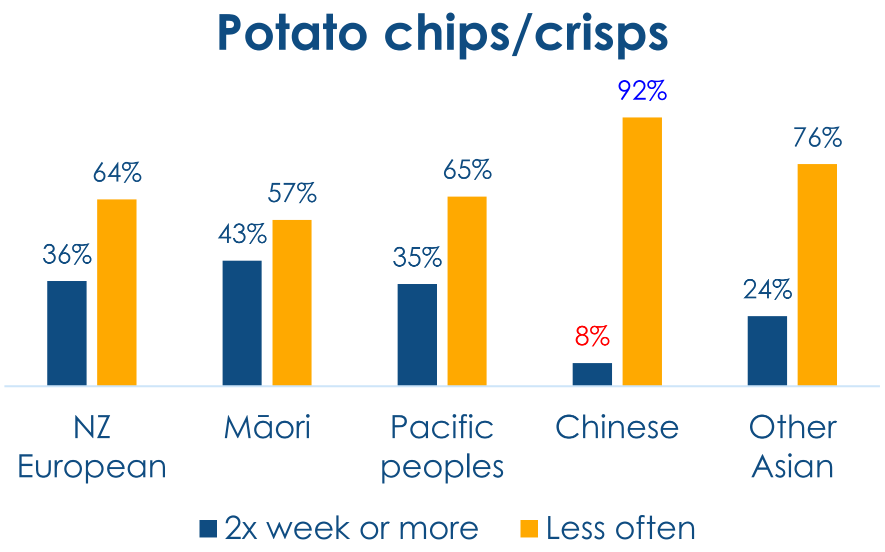
Relative to other centres or regions, a significantly greater proportion of Aucklanders consumed frozen potato products and potato crisps very frequently, than less frequently.

Statistical coding legend: Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

Consumption frequency – by ethnicity







Relative to other ethnicities, a significantly greater proportion of Chinese participants consumed fresh potatoes, frozen potato products and potato crisps less frequently.

Relative to other ethnicities, except Chinese, a greater proportion of 'Other Asian' participants consumed frozen potato products less frequently.

Statistical coding legend: Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.

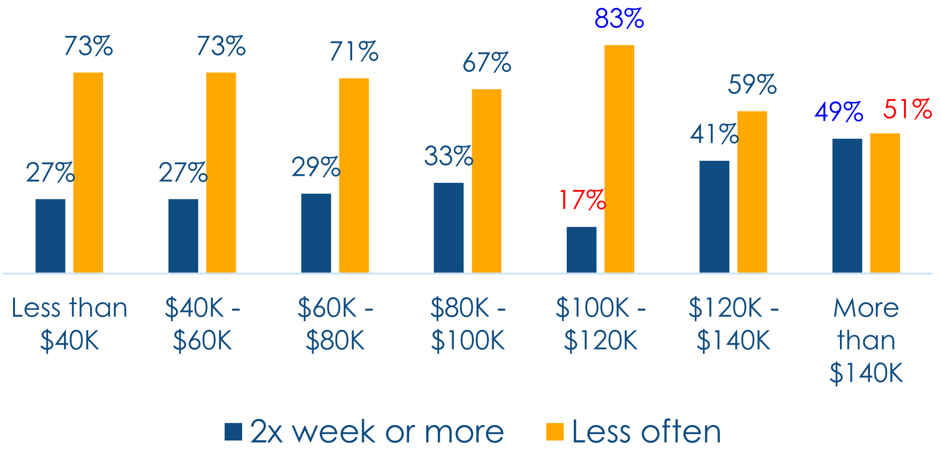
Consumption frequency – by gross, annual household income

FORWARD

Fresh potatoes

Frozen potato products

Potato chips/crisps



Relative to lower incomes, a significantly greater proportion of those with a gross, annual household income of more than $140K consumed fresh potatoes, frozen potato products and potato crisps very frequently.

Conversely, a significantly smaller proportion of households with an annual income lower than $40K consumed fresh potatoes very frequently.

Statistical coding legend: Blue or ↑= Statistically high at 95% confidence level, Red or ↓ = Statistically low at 95% confidence level, compared to all other options on average.