

SUSTAINABILITY: A CONSUMER & CUSTOMER PERSPECTIVE

Future Proofing New Zealand Potatoes: Agronomy Summit 2026, Auckland

00 Date 2026

CONFIDENTIAL



WHAT'S ON KIWIS' MINDS



COST OF LIVING REMAINS # 1 CONCERN

TOP 5 OVERALL CONCERNS



The cost of living 75%

Change
v 2024

+1%



Not having access to good,
affordable healthcare 73%

+9%



Protection of children from
mental, physical and sexual
abuse 70%

-2%



The level and treatment of
mental health issues 61%

+3%



The impact of Social Media 60%

+4%



Violence in society 60%

-2%

TOP 5 ENVIRONMENTAL CONCERNS



Pollution of lakes,
rivers, and seas 58%

Change
v 2024

-1%



Managing our
waste including recycling 57%

+3%



Microplastics in the
environment and food
sources 56%

+1%



Protection and management
of conservation land and
water ways 52%

+2%



The impact of climate
change on New Zealand 52%

+2%



YET, KIWIS HAVE HELD STEADY IN MANY OF THEIR ATTITUDES



CONSCIOUS CONSUMERS ARE A DIVIDED COHORT



26% Skeptics

Low awareness and priority

More likely to be climate change deniers

Don't prioritize sustainability in their lives

Distrustful of claims and efforts.



18% Idealists

Passionate but struggle to put into practice

Sustainability is more about Society and People

Motivated by events/others that climate change is happening now

Impacted by the cost-of-living crisis yet say they prepared to pay a price premium



17% Minimalists

Basic awareness of sustainability but no strong motivation

Sustainability focuses on pollution and the protection of resources

Financially secure but prudent by nature

Acting sustainably by default for cost reasons

Affordability drives purchase



20% Healthy 'me' & 'Planet'

Embrace importance with a focus on health and take some action

High awareness of sustainability but focus on environment over society

Feel personal health is affected and seeing more pollution

Health/safety is a key brand choice driver



19% Evangelists

"Walk the talk"

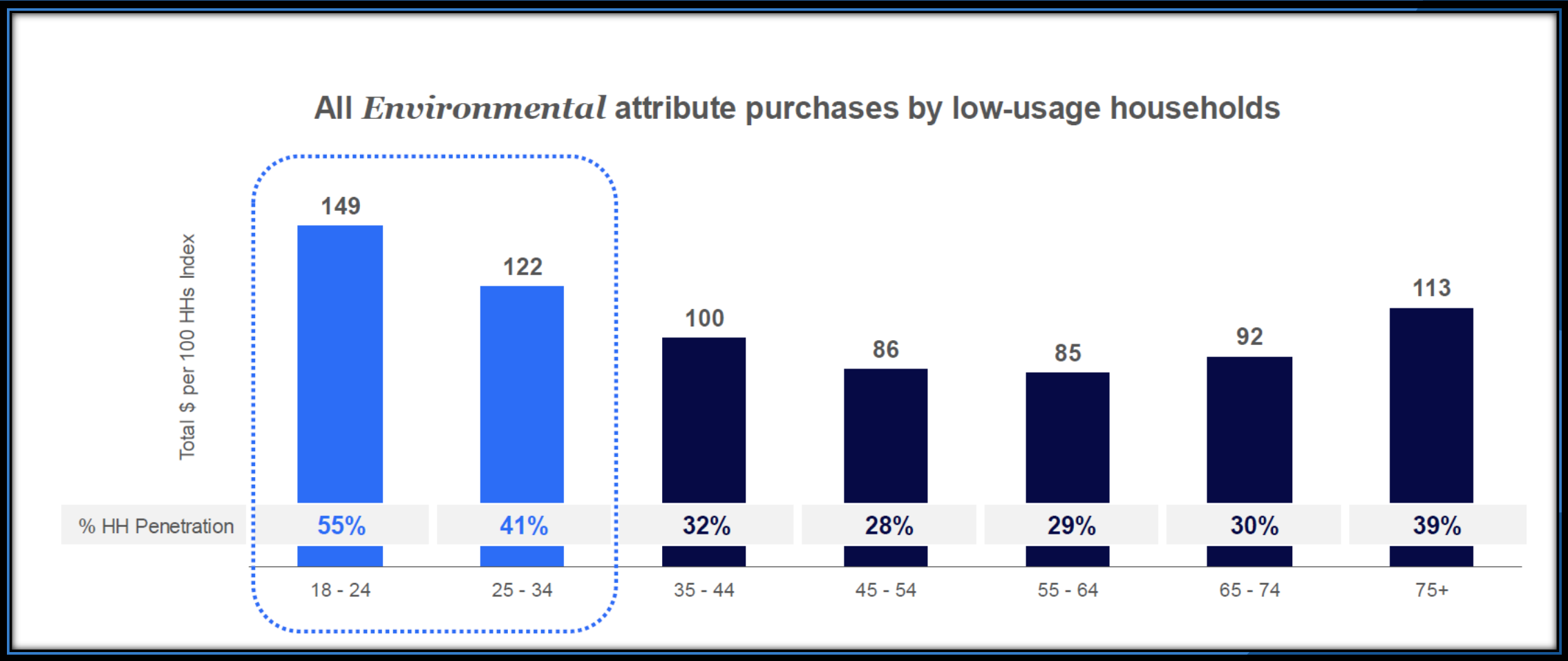
Sustainability encompasses planet and people

Want to leave a world behind for future generations

Take multiple actions to live sustainably most of the time with the aim to do more in the future

Prioritize sustainable living regularly in their lives

SUSTAINABILITY REMAINS STRONG WITH YOUNG CONSUMERS





OUR RETAILERS AGREE...

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THE CONSUMER IS THE MOST POWERFUL SIGNAL



Chris Quin • Following

CEO Foodstuffs Nth Is | MD Foodstuffs NZ | Chair Giltrap Grp
1d • Edited •

Great to be able to speak at the Primary Industries New Zealand Summit, and talk with so many of the people who are driving the future of one of New Zealand's most important sectors.

I have huge respect for the producers, growers, exporters and primary processors who are literally at the grassroots of NZ's global reputation for premium food.

These producers and growers are also critical partners to our locally owned retailers and stores. Our mutual success depends on understanding consumer needs at home and in the export markets where New Zealand food has such a reputation to tell.

That was the focus of my comments today: what customer behaviour tells us about changing demand, and how those insights can help the primary sector for the opportunities and challenges ahead.

Every week, millions of customer decisions give us signals about value, health, convenience, provenance, resilience and trust. Those signals matter for retailers, suppliers, producers and exporters alike.

For New Zealand, the opportunity is to keep connecting those signals back through the food system - so we can better align what we grow, make, move and sell with what consumers will value next.

I've always seen the success of our primary sector and NZ's grocer sector as connected – complementary, strengths for our country.

Thanks to [Federated Farmers](#) and Brightstar for the opportunity to be part of such an important conversation.



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foodstuffs NORTH ISLAND

Delivering our plan

01

We act like a leader
and speak up on
issues that matter

02

We care for, and
unlock the potential
of, our people

03

We have a
positive impact
on the planet

04

We apply
circular thinking in
everything we do

05

We embrace the
power of partnerships
to create change

 People

 Planet

 Product

Goal 1
Be a truly
inclusive
workplace

Goal 2
Invest in the
holistic wellbeing
of our team

Goal 3
Create meaningful
retail careers for
today and
tomorrow

Goal 4
Activate ethical and
mutually beneficial
partnerships
through the whole
value chain

Goal 5
Have a positive
impact on our
customers and
communities

Goal 1
Powered
by green
electricity

Goal 2
Reducing hunger
and food waste

Goal 4
Practise responsible
stewardship
of natural resources

Goal 3
Net positive
carbon emissions

Goal 1
Make health
easier for
all New
Zealanders

Goal 2
Our packaging
is sustainable

Goal 5
Lead the responsible
retailing of alcohol
and tobacco

Goal 4
Lead the future
of protein

Goal 3
Own Brand
sourcing
is sustainable

Our goals are underpinned by over 40 commitments



Kia p te āp

Planet

Goals and commitments

Delivers on Sustainable Development Goals:



Goal 1. Powered by green electricity

- By 2025, we will source 100% renewable electricity to power our business.

Goal 2. Reducing hunger and food waste

- We aim to have all food waste from our operations diverted from landfill by 2025, starting with our supermarkets
- We aim to broaden our impact by partnering to reduce food waste in our value chain
- With the help of our partners, we aim to redistribute 100% of edible unsold food so it can be consumed.

Goal 3. Net positive carbon emissions

- By 2030, in line with climate science, to reduce emissions from our operations to net positive. 63% compared to a 2015 baseline.¹
- By 2030, in line with climate science, aim to reduce our scope 3 emissions compared to a 2015 baseline.¹
- In line with climate science, we aim to reach net positive emissions for our operations later than 2050, and much earlier if possible.
- All new property developments will achieve a 4 Green Star design and as-built rating and by 2025 we aim to have a 5 Green Star minimum standard.
- By 2030, we aim to achieve 100% Electric Vehicle (EV) last mile delivery fleet, helping reduce our absolute Group transport emissions by -60% compared to F22.

Goal 4. Practice responsible stewardship of natural resources

- By 2025, understand the impact and dependencies of our priority fresh supply chains² on nature and increase supplier adoption of sustainable and regenerative practice in these categories.
- We will reduce our Group water use by 10% by 2025 (2020 baseline).



PEPSICO ANZ

WINNING WITH PEP+

Our vision is to **Be the Global Leader in Convenient Foods and Drinks by Winning with PepsiCo Positive (pep+).**

pep+ is our strategic end-to-end transformation that places sustainability at the center of our business strategy, seeking to drive growth and build a stronger, more resilient future for PepsiCo and the communities where we operate.

PEP+ has 3 interconnected pillars:



POSITIVE AGRICULTURE

We are working to source our crops and ingredients in ways that restore the earth and strengthen farming communities.



POSITIVE VALUE CHAIN

We are helping to build a circular and inclusive value chain.



POSITIVE CHOICES

We are inspiring consumers through our brands to make choices that create more smiles for them and the planet.



THANK YOU