

Rabobank - KiwiHarvest New Zealand Food Waste Survey

2023 Results



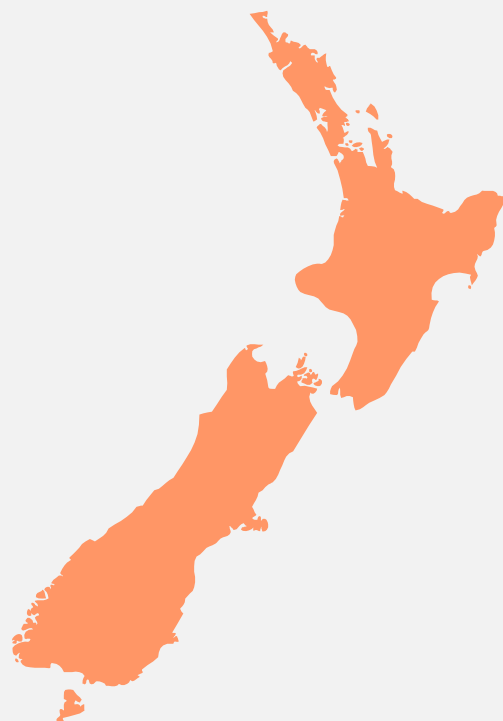
Kantar conducted the New Zealand Food Waste study in Q3 2023 to provide Rabobank and KiwiHarvest with nationally representative collateral for PR purposes

Overview of methodology

Kantar conducted n=1,501 online interviews from **25th July – 14th August 2023**

Data collection was **nationally representative** to ensure that results could be used to measure New Zealanders attitudes and behaviours

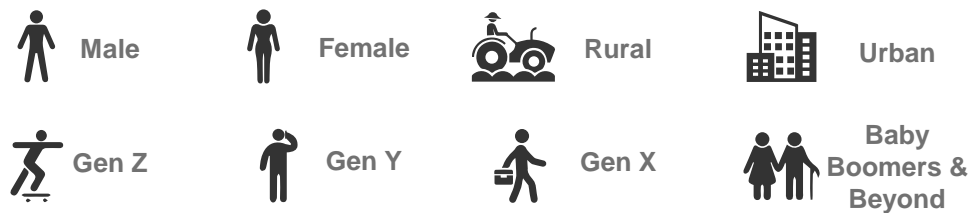
An additional **sample boost** was included to provide greater granularity around **rural** New Zealanders



Overview of analysis and weighting

Data was post-weighted to ensure results are nationally representative – with results compared to 2022 where questions were consistent

Key segment perceptions are reported throughout the report using the following icons

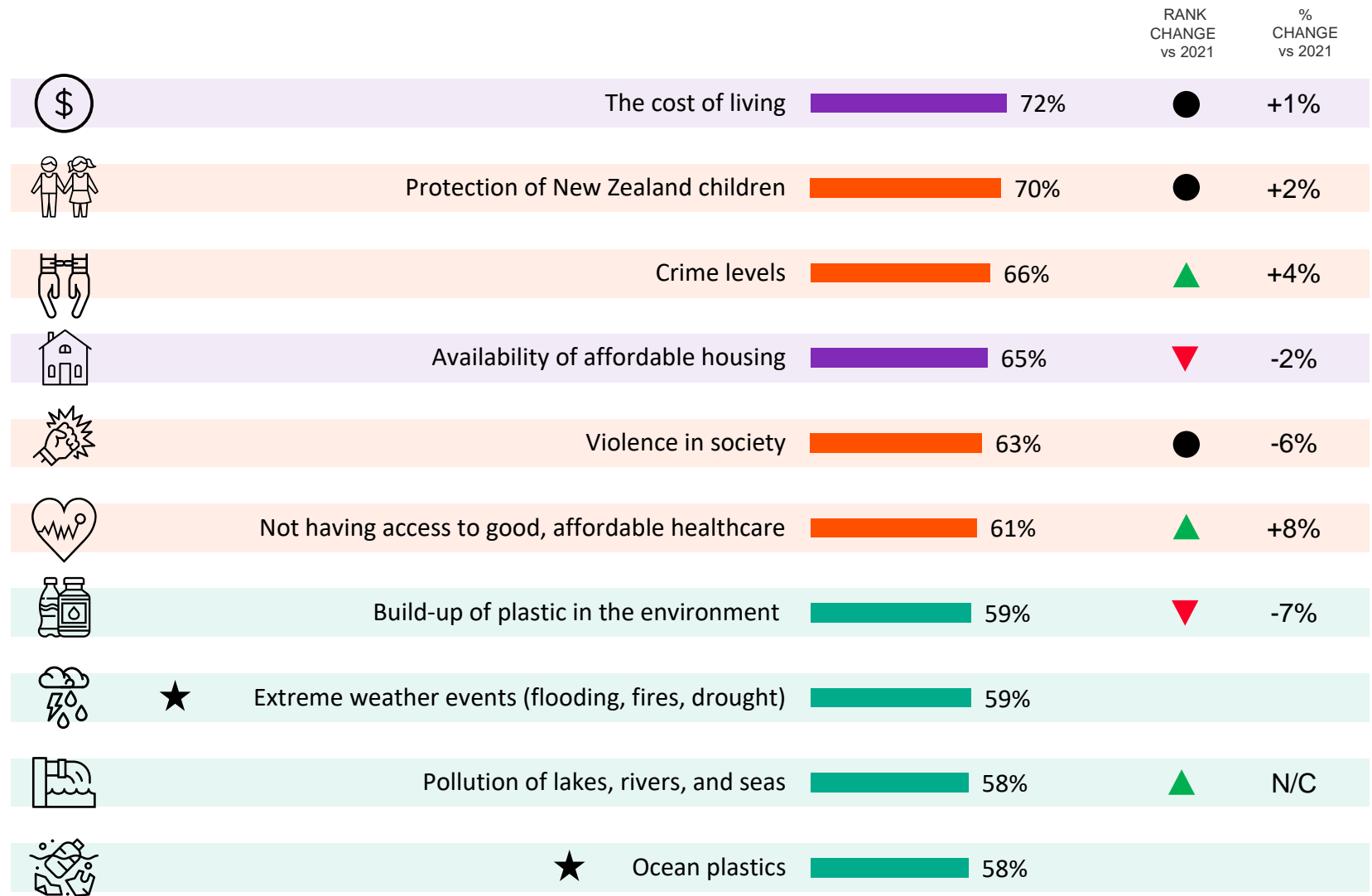





Market Context



In terms of the key issues to NZ'ers, the cost of living remains our primary issue of concern

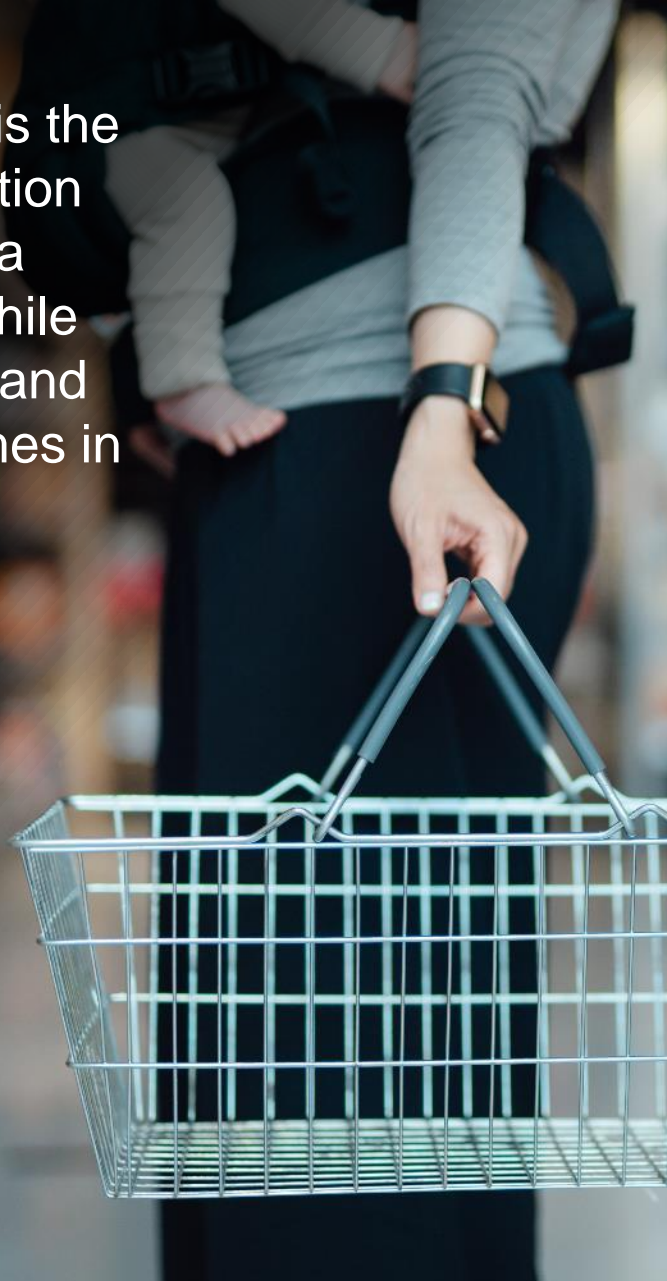
TOP 10 CONCERNS



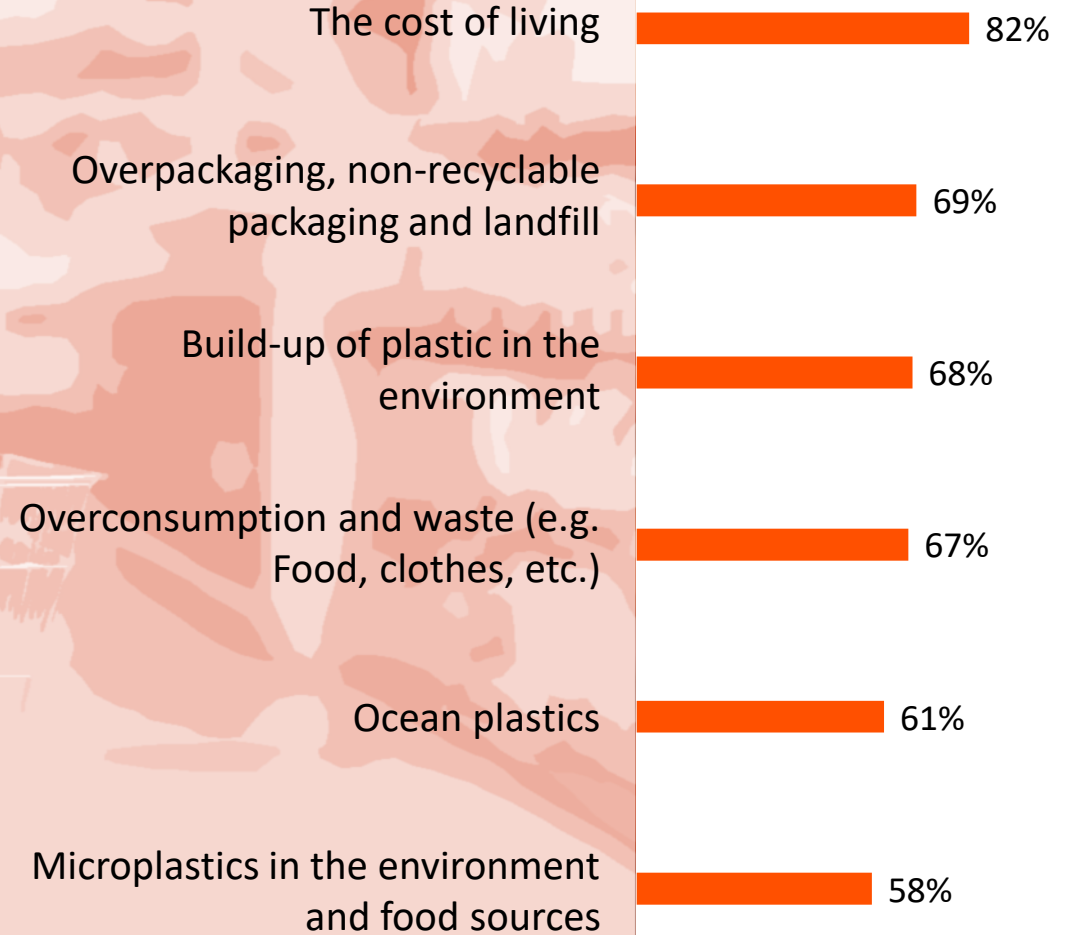
 Economic
 Social sustainability
 Environmental

● Same position ▲ Moved up
 ★ New Top 10 entrant ▼ Moved down

The cost of living is the leading consideration when purchasing a good or service while overconsumption and waste of food comes in only fourth



IMPACT UPON PURCHASE



We know that people's level of commitment to living a sustainable lifestyle has more than doubled over the last 10 years

LEVEL OF COMMITMENT TO LIVING A SUSTAINABLE LIFESTYLE



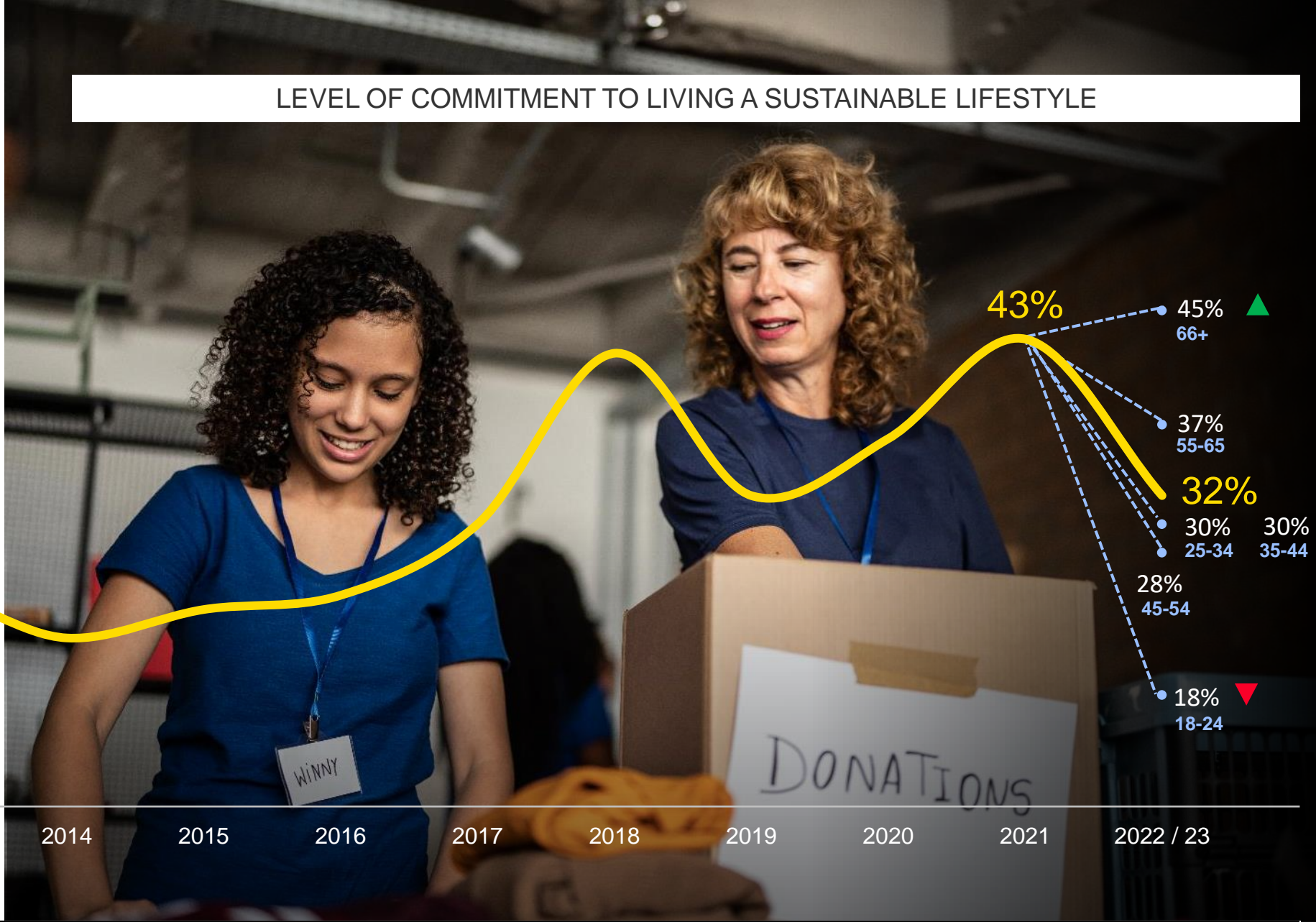
However, it is equally clear that the barriers to enabling that lifestyle commitment have measurably increased in the last 12 months

LEVEL OF COMMITMENT TO LIVING A SUSTAINABLE LIFESTYLE



It's clear that the younger a NZ'er is the more their commitment to a sustainable lifestyle is being challenged

LEVEL OF COMMITMENT TO LIVING A SUSTAINABLE LIFESTYLE

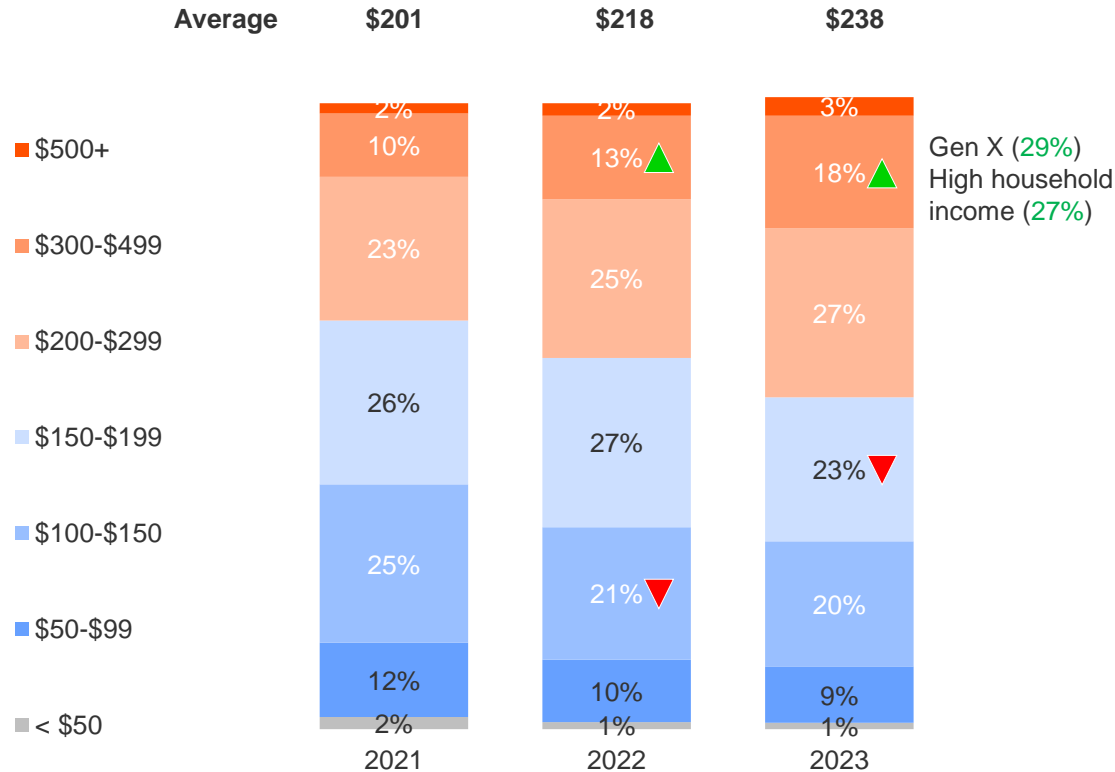


*How are Kiwis' food
and shopping
behaviours changing?*

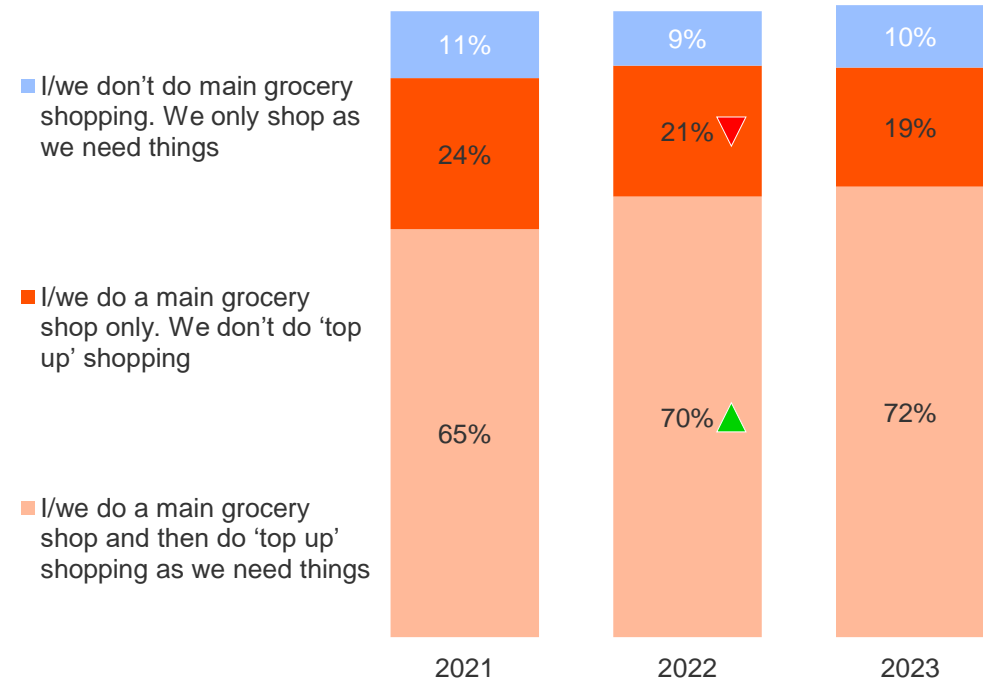


Average household food spend increased YOY likely due to inflation. However, shopping behaviours have not changed with the majority still doing top ups. The increased average spend of \$300 – 499 per week is higher among Gen X and higher household income earners

Household food spend (average week, 2023)



Typical grocery shopping behaviour (2023)



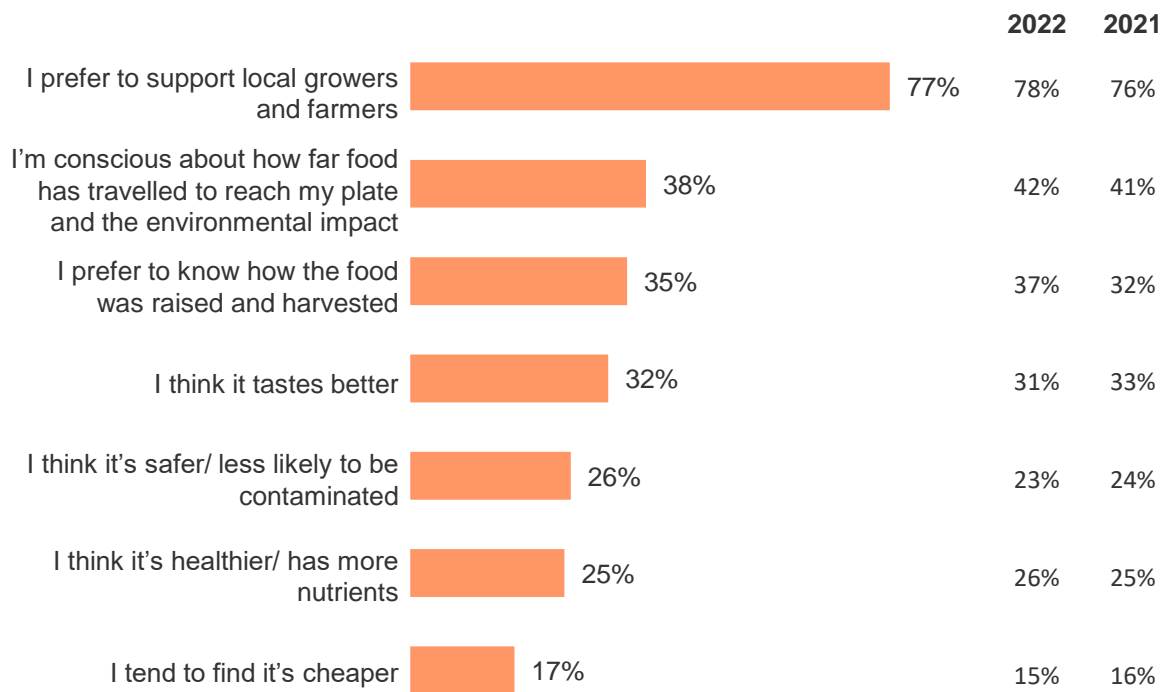
▲ ▼ Significantly higher/lower than previous year

NOTES:

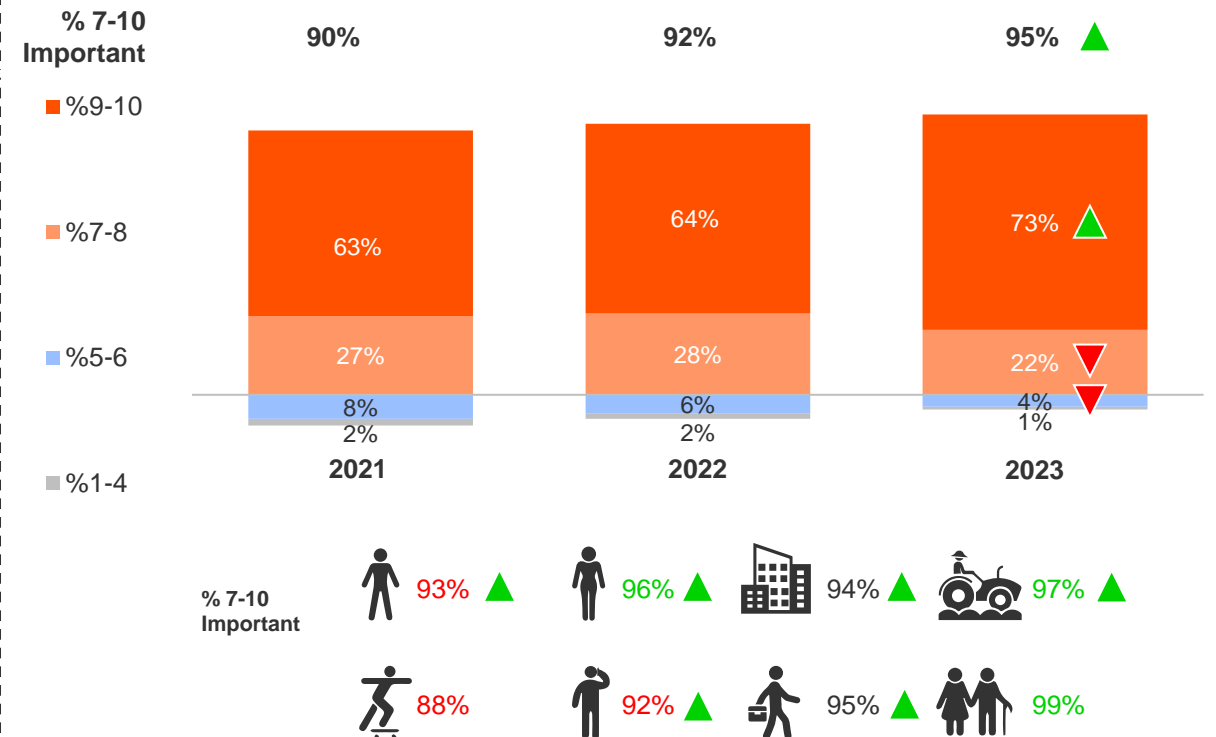
1. Sample 2021 (n=1509), 2022 (n=1502), 2023 (n=1501)
2. Q "In an average week how much does your household spend on food? Please include all food regardless of how you buy it so include food bought from supermarkets, markets, restaurants, cafes, takeaway outlets etc."
3. Q "Which statement best describes the way you do your grocery shopping?"

The importance of farming and food production in New Zealand increased significantly especially among Gen X and Y. The preference for buying local remains centred around supporting the local producers

Reasons for locally produced food preference (agree would like to buy direct from grower / farmer more often, 2023)



Perceived importance of farming and food production to New Zealand (2023)

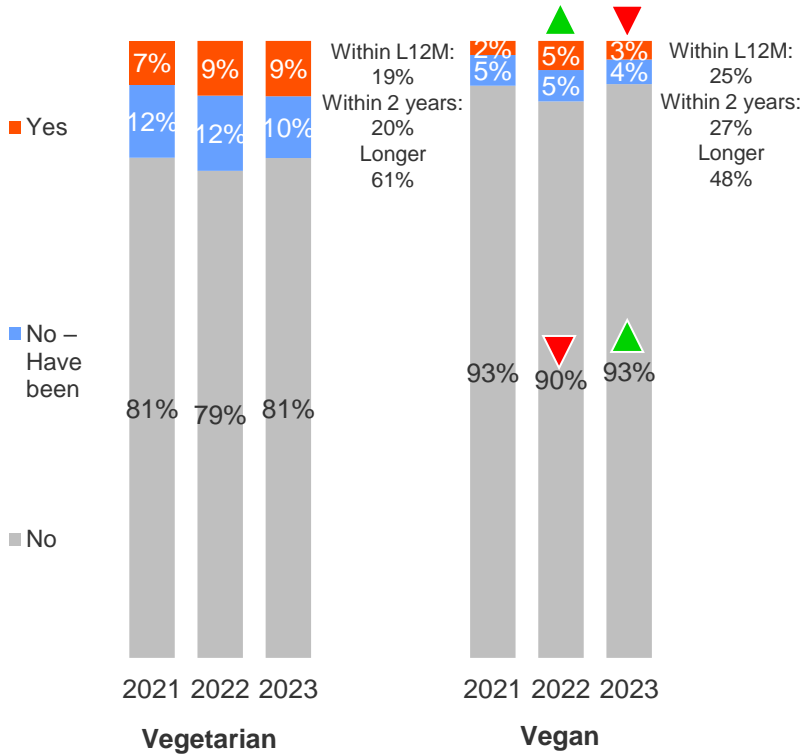


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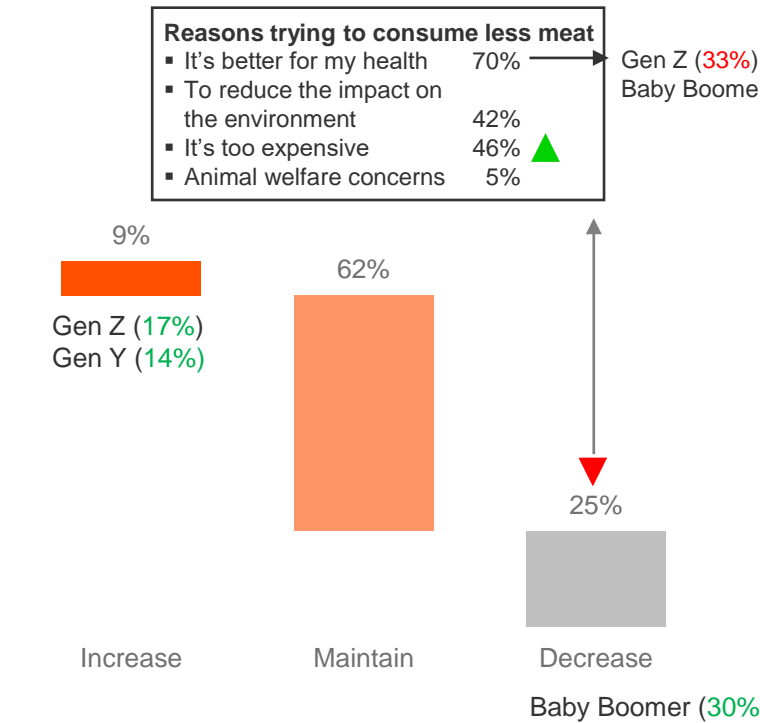
NOTES:
 1. Sample 2021 (n=1509), 2022 (n=1502), 2023 (n=1501)
 2. Q "Why do you prefer to buy food that has been produced locally?"
 3. Q "How important would you say farming and food production is to New Zealand?"

Vegetarian numbers saw little change while vegans significantly decreased back to 2021 numbers. Meat consumption decreased among Baby Boomers, but it is the opposite for Gen Y and Z. The increasing price of meat continued to grow in significance

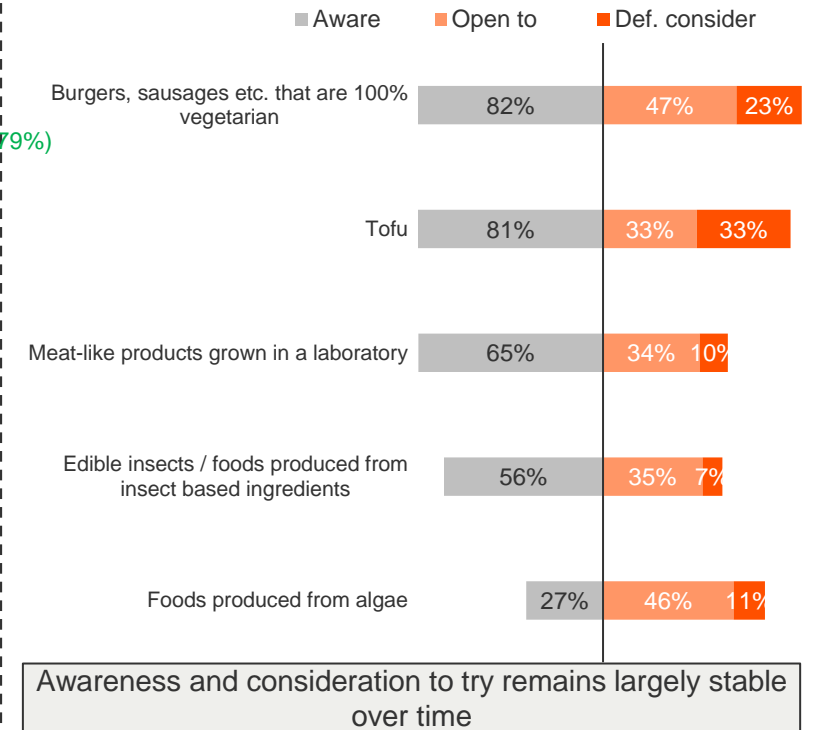
Food behaviours – Vegetarian and Veganism (2023)



Desired changes in meat consumption (2023)



Awareness and openness to adding meat alternatives to diet (2023)



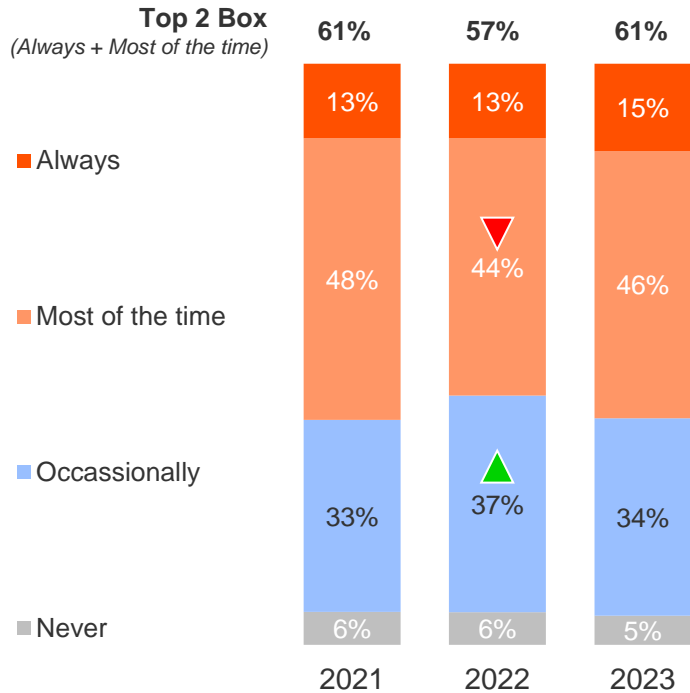
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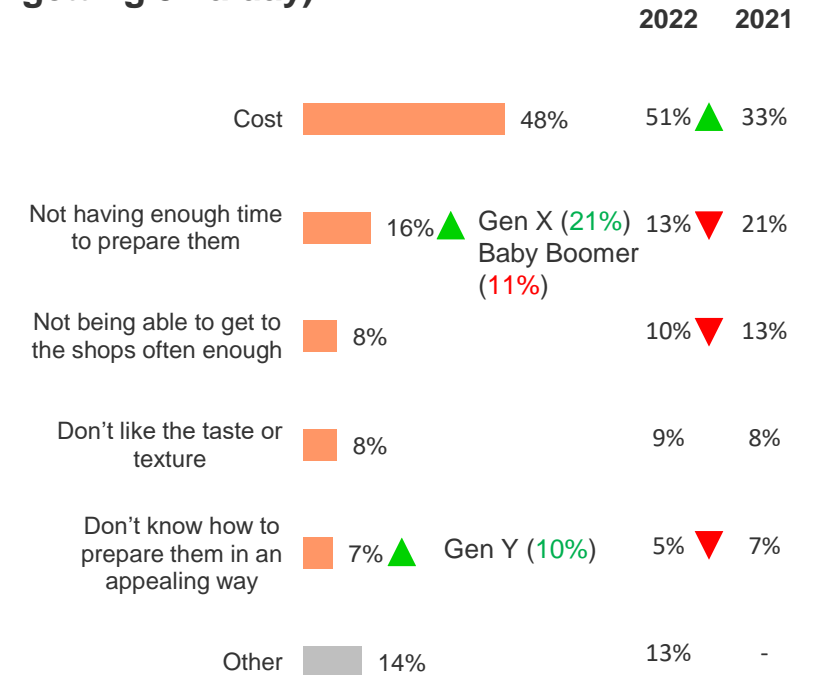
- Sample 2021 (n=1509), 2022 (n=1502), 2023 (n=1501)
- Are you a vegetarian?/ How long have you been a vegetarian
- Are you a vegan?/ How long have you been a vegan
- Would you say you are currently trying to change the amount of meat in your diet?
- Before today, have you heard of any of the following?

The number of New Zealanders getting their 5+ a day has increased marginally – higher among males, and Gen Y and Z. Cost remains the primary obstacle among those who aren't, though insufficient time and not knowing how to prepare them in an appealing way have significantly increased especially among Gen X and Y respectively

Frequency eating a minimum of 3 servings of veggies and at least 2 fruit each day (Top 2 Box, 2023)



Key obstacle to eating more fruits and vegetables (amongst those not always getting 5+ a day)



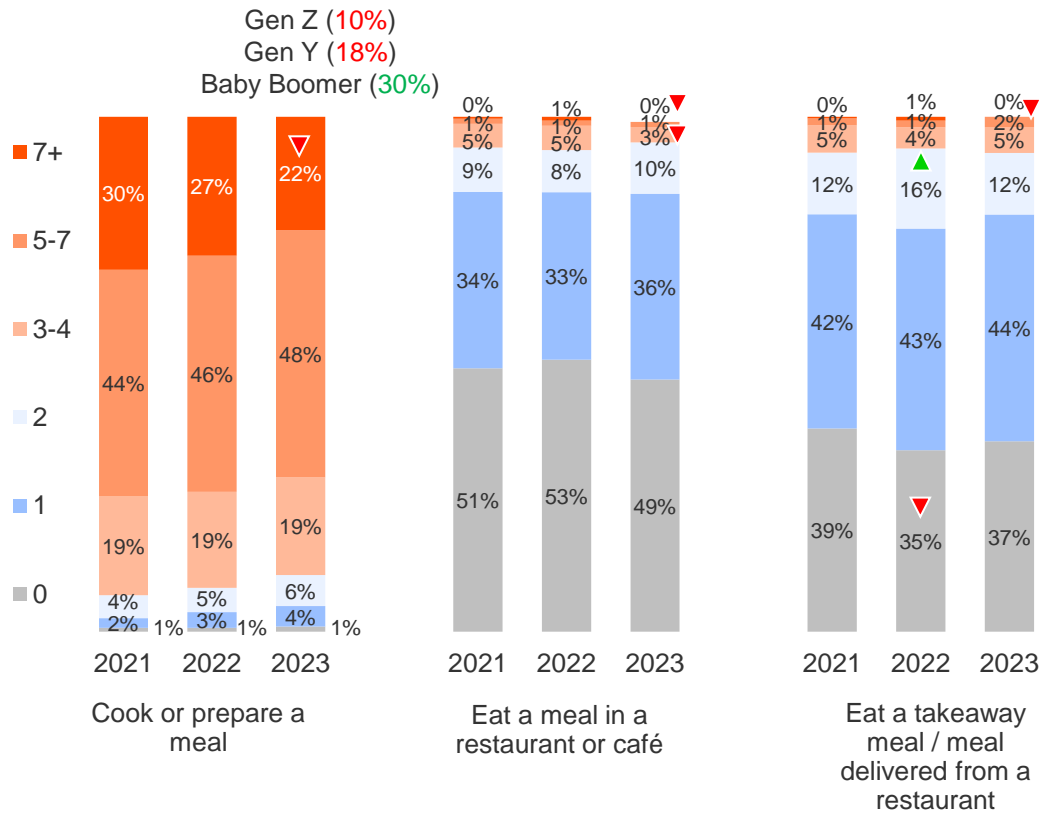
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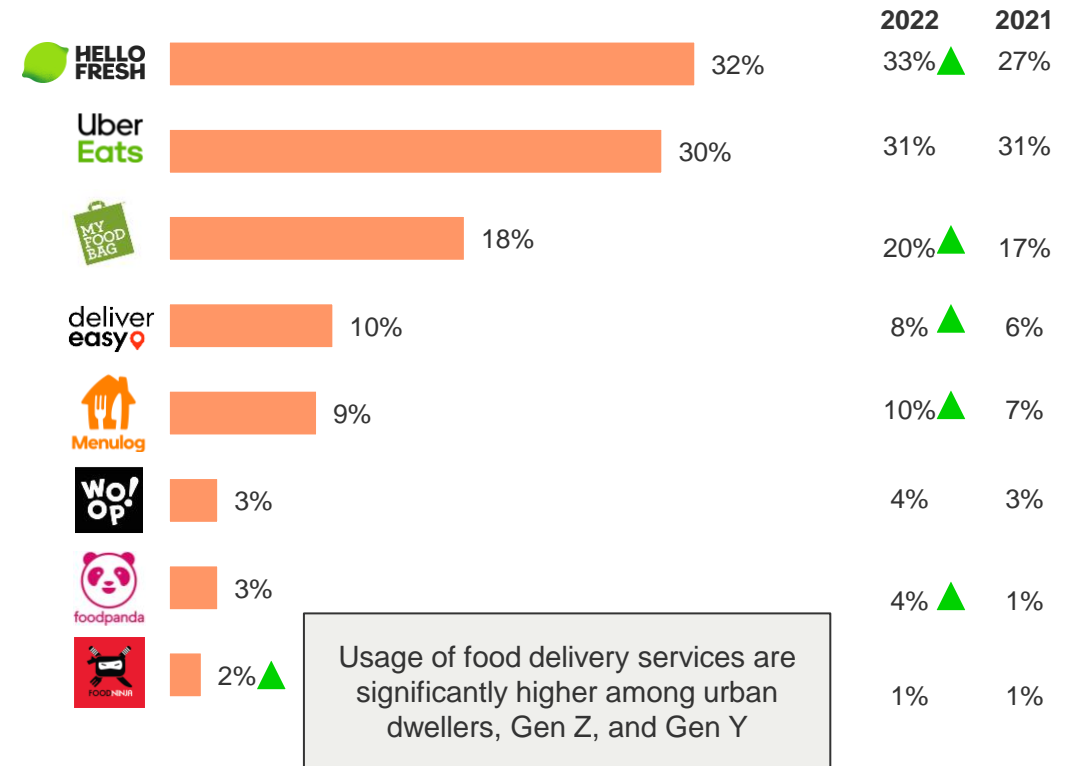
- Sample 2021 (n=1509), 2022 (n=1502), 2023 (n=1501)
- Q "It is recommended that you eat a minimum of 3 servings of veges and at least 2 fruit each day. How often would you say you do this?"
- Q "What is the primary obstacle to you eating more fruits and vegetables?"

Preparing meals at home remains the most common form of food consumption but it continued to decline YOY with a significant drop in 2023 due to Gen Z and Y. Usage of food delivery services remains consistent. Not surprisingly, usage is higher among urban dwellers, Gen Z and Y

Frequency of food consumption (times per week, 2023)



Usage of food delivery services (used last 12 months, 2023)



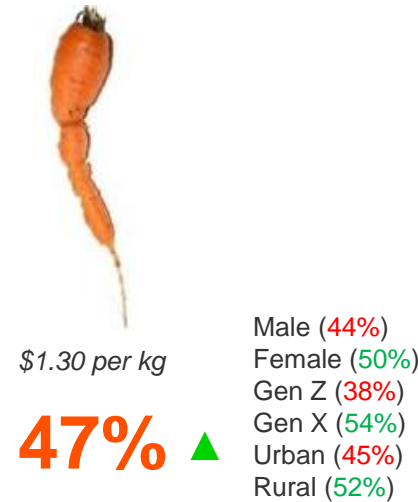
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NOTES:

1. Sample 2021 (n=1509), 2022 (n=1502), 2023 (n= 1501)
2. Q "In a typical week, how often would you say you or your household does the following?"
3. Q "Have you ever used any of the following food delivery services in the last 12 months?"

Preference for the cheaper imperfect fruit/vegetables over the more expensive regular appearance vegetables has increased significantly. Almost half of New Zealanders prefer the imperfect option, but there is lower preference among males, Gen Z, and urban dwellers

Preference for vegetables (2023)



2022	45%	40%	15%
2021	39%	43%	18%

▲▼ Significantly higher/lower than previous year

NOTES:

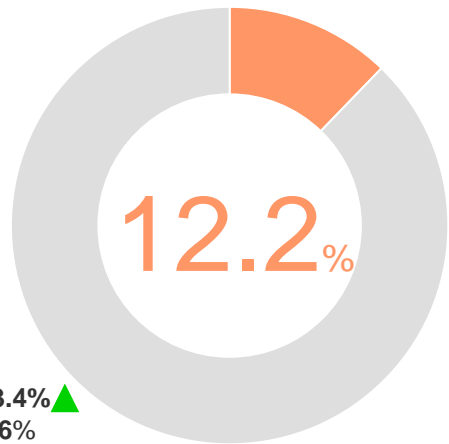
1. Sample 2021 (n=1509), 2022 (n=1502), 2023 (n=1501)
2. Q "Please see below for images of two carrots. Both carrots are exactly the same on the inside, Carrot A costs \$3.99 per kilogram, Carrot B costs \$1.30 per kilogram. Which carrot would you be more likely to purchase?"

Are Kiwis becoming more waste conscious?



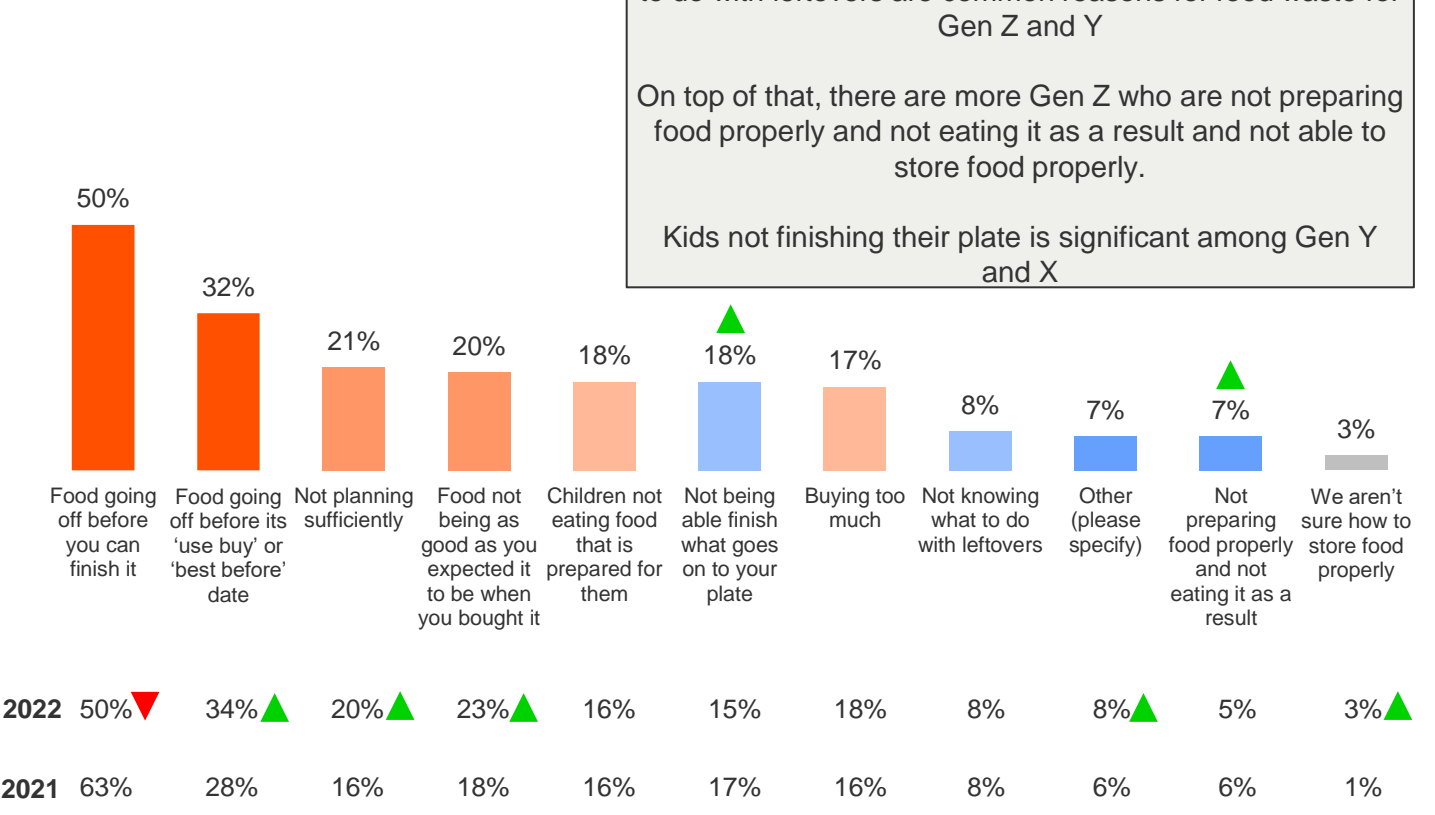
The estimated percentage of food waste decreased slightly, especially among females, rural dwellers, Gen X, and Baby Boomers. However, the cost of food waste has increased due to rising household food spend but there is also rise in the number of households. Food going off remains the top reason but there have been significant increases in not being able to finish and not preparing food properly

Estimated percentage of food waste (% of household spend)



This translates to **\$1,510 per household** per year of food wasted or **\$3.2 billion of waste each year** (1)
 \$3.1b in 2022
 \$2.4b in 2021

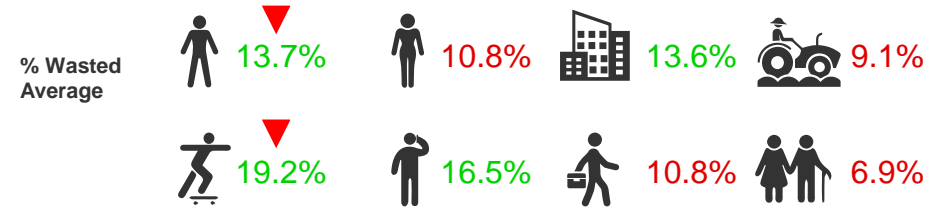
Key reasons for wasted food



Appropriate food storage knowledge, and not knowing what to do with leftovers are common reasons for food waste for Gen Z and Y

On top of that, there are more Gen Z who are not preparing food properly and not eating it as a result and not able to store food properly.

Kids not finishing their plate is significant among Gen Y and X

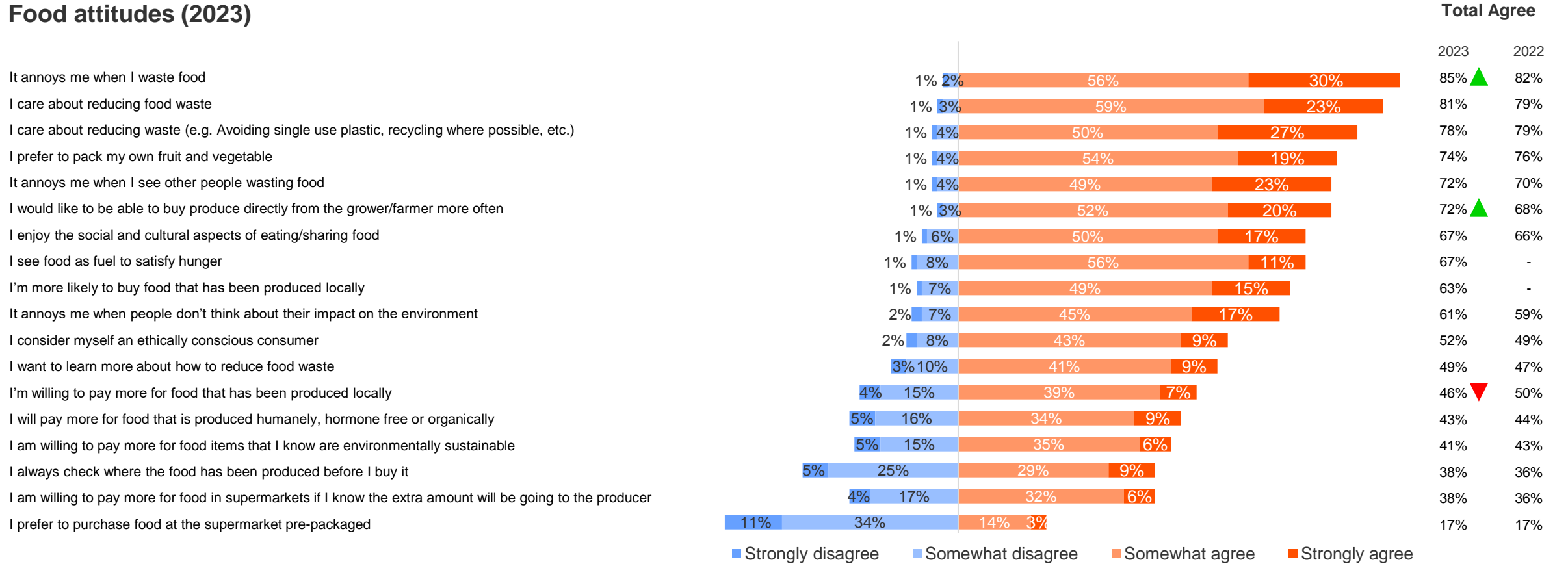


xx/xx Significantly higher/lower than total ▲ ▼ Significantly higher/lower than previous year

NOTES:
 1. Sample 2021 (n=1509), 2022 (n=1502), 2023 (n=1501)
 2. Q "Thinking about how much your household spends on food each week, what proportion do you estimate goes to waste? Please type a percentage in the box below. Enter number from 0% to 100%"
 3. Q "What are the main reasons why food is wasted in your household? Please choose your top three from the list below."
 4. Based on 1.943 million New Zealand households 2023 (Stats New Zealand)

The proportion of New Zealanders saying that it annoys themselves when they waste food, and that they would like to be able to buy directly from the grower has significantly increased this year. However, less people say that they are willing to pay more for locally produced food

Food attitudes (2023)



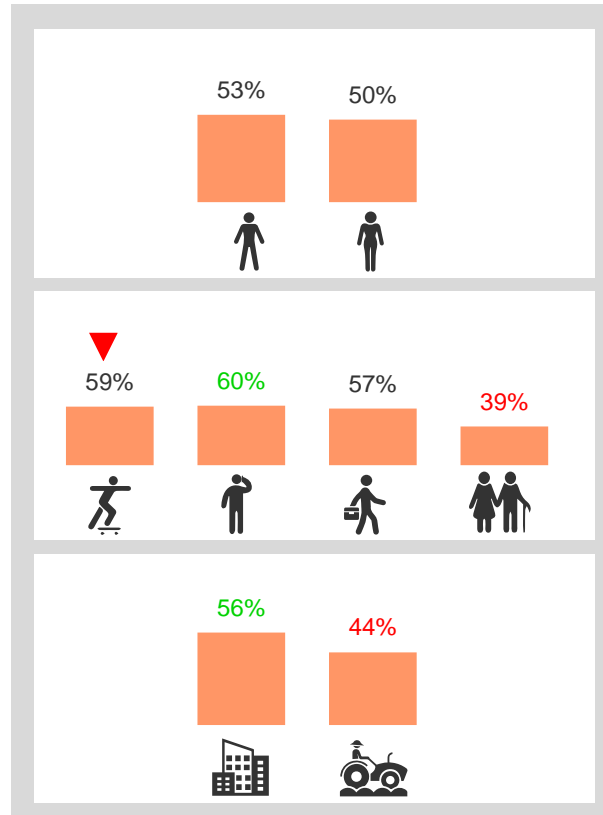
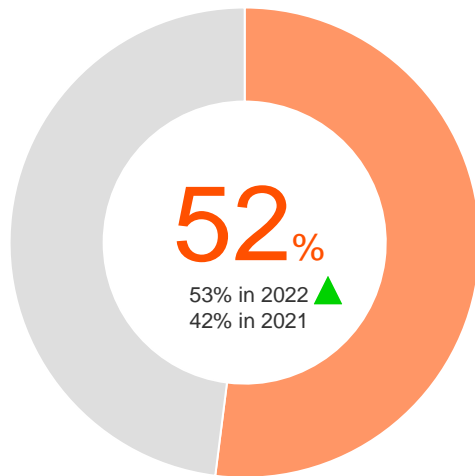
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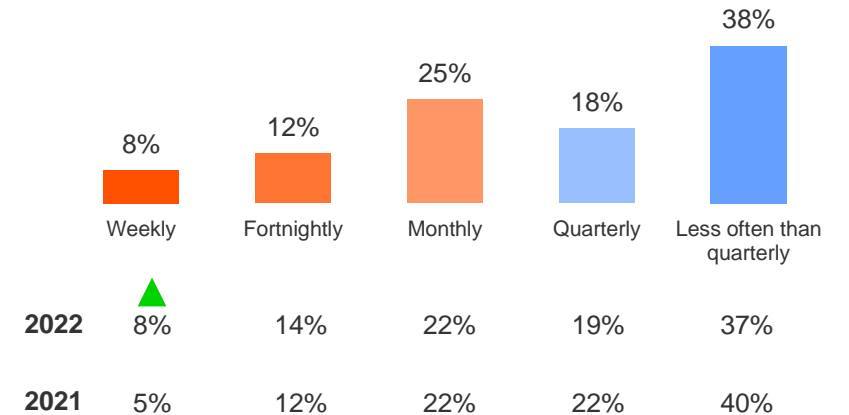
1. Sample 2022 (n=1502), 2023 (n=1501)
2. Q "To what extent do you agree with the following statements?"

There are still half of New Zealanders who have thrown away unopened or untried food. Younger generations and urban dwellers are more likely to do so, though this has decreased significantly among Gen Z. However, more than half only do it on a quarterly basis or lesser

Proportion of New Zealanders who have purchased food that you ended up throwing away without having tried or eaten it in the last 12 months (2023)



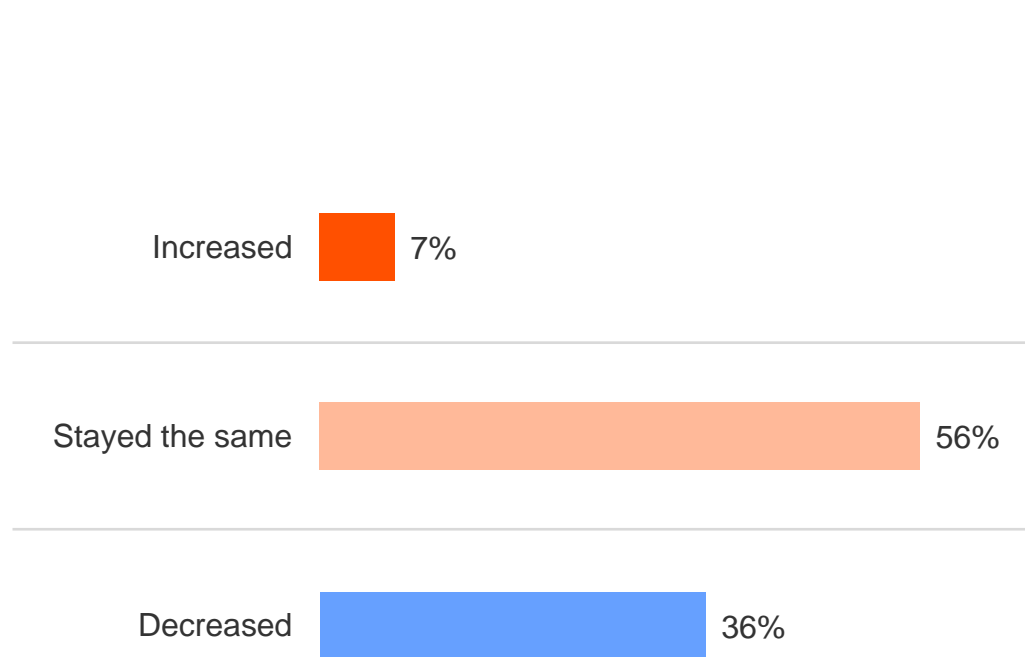
Frequency of throwing away food (amongst those who have done it, 2023)



xx/xx Significantly higher/lower than total ▲ ▼ Significantly higher/lower than previous year

More than one-thirds of New Zealanders report their food waste decreasing, especially among females and Baby Boomers

Food waste increase / decrease (2023)

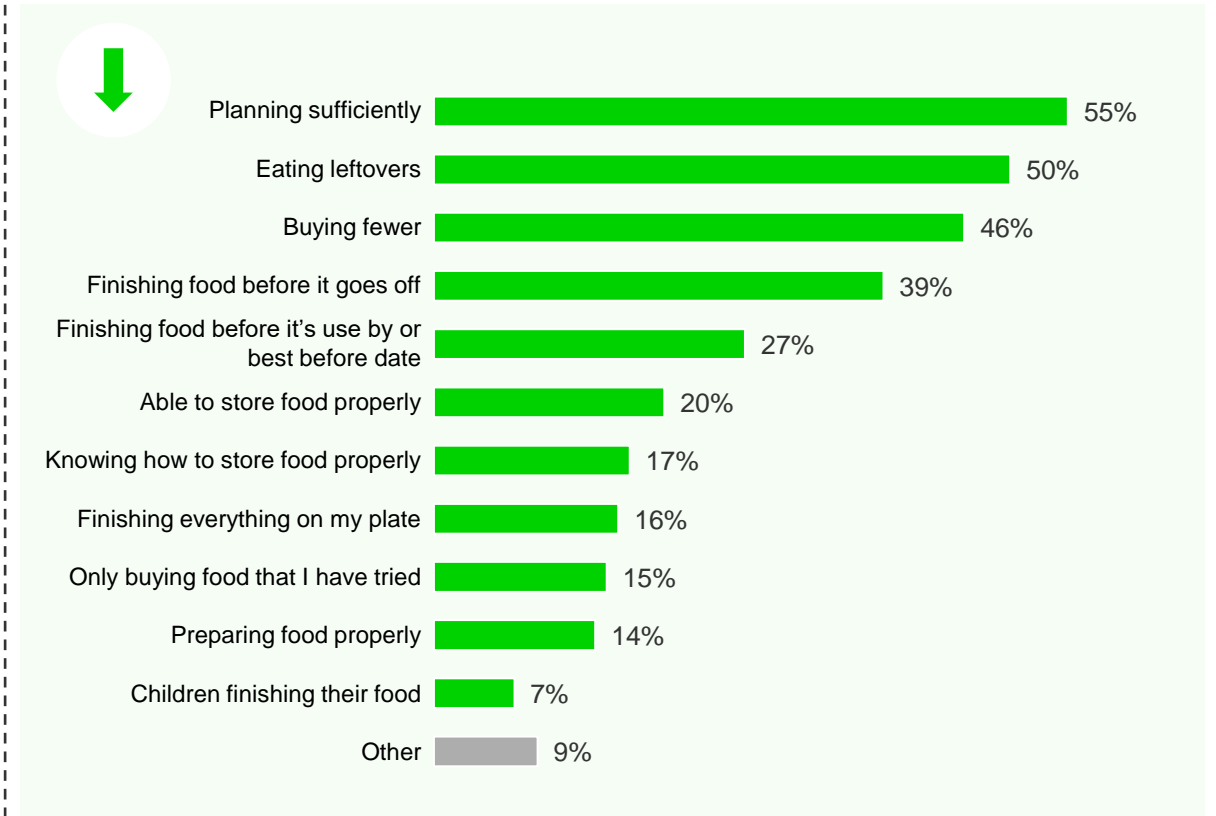


Increased	9%	6%	10%	14%	6%	2%	9%	4%
Stayed the same	61%	52%	61%	52%	56%	58%	55%	58%
Decreased	30%	42%	29%	33%	38%	40%	36%	38%

xx/xx Significantly higher/lower than total Significantly higher/lower than previous year

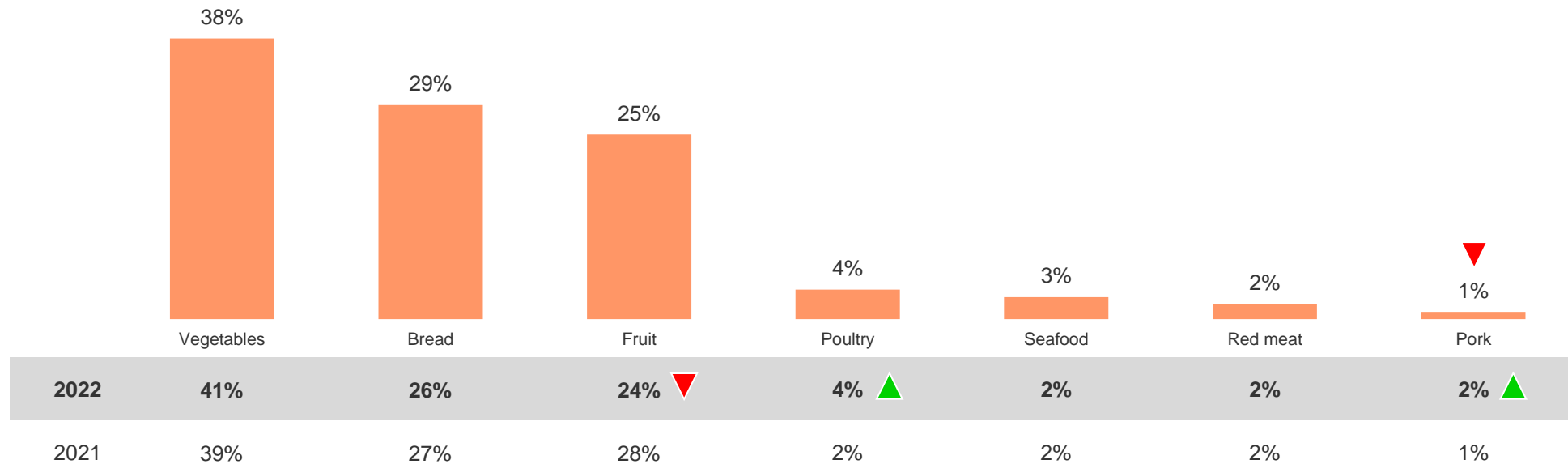
Planning sufficiently, eating leftovers, and buying less are the primary reasons among those who said their food waste decreased. The opposite is also true with insufficient planning being the top reason for wastage. Food going off before finishing it or before it's best before date and children not eating what has been prepared are the other main reasons for wastage

Reasons for food waste increase / decrease (2023)



Vegetables, bread, and food remain the most wasted foods

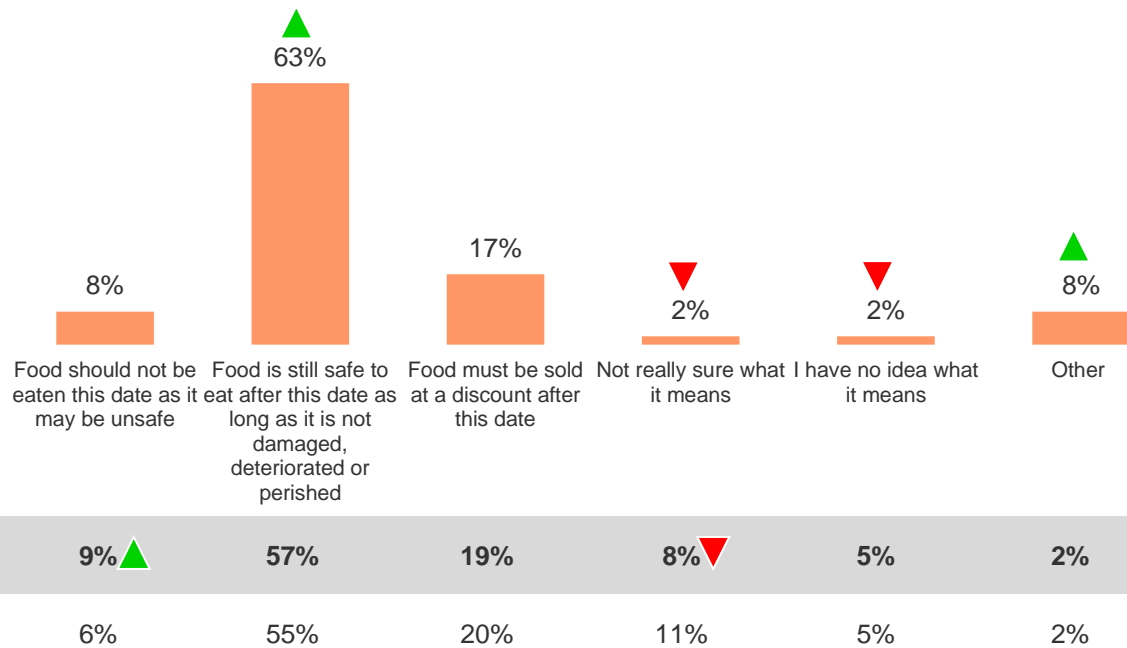
Foods wasted the most (2023)



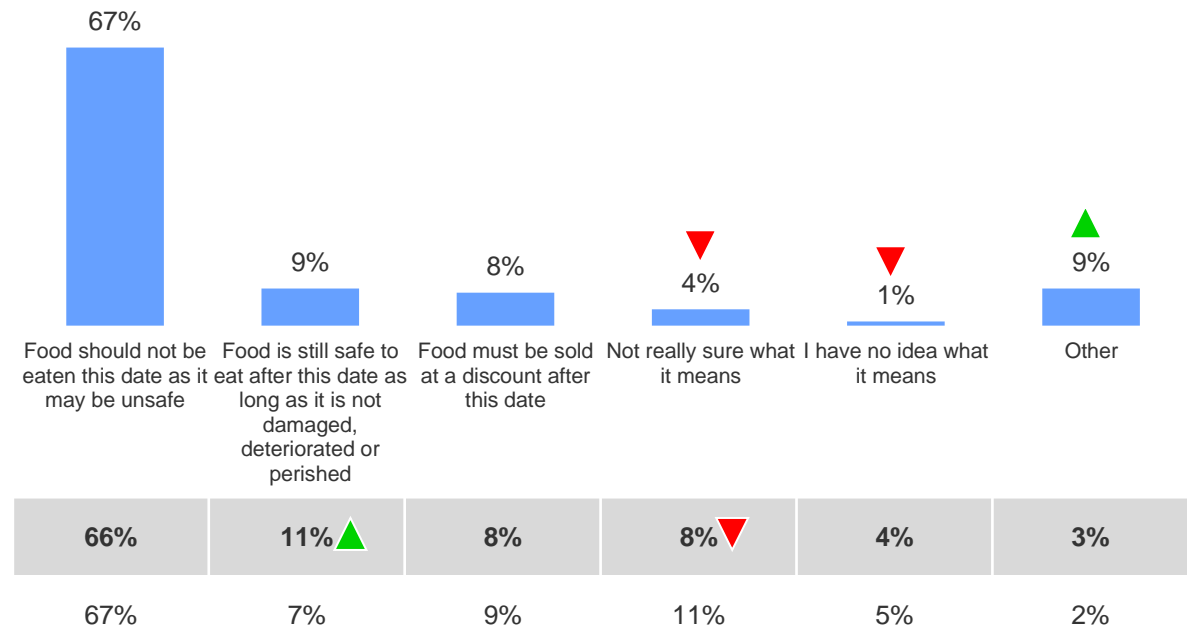
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6 out of 10 people believe food with 'best before' stickers are still safe to eat after the date, a significant increase on last year. Two-thirds believe food should not be eaten after a 'use by' date

Understanding of 'best before' sticker



Understanding of 'Use by' sticker



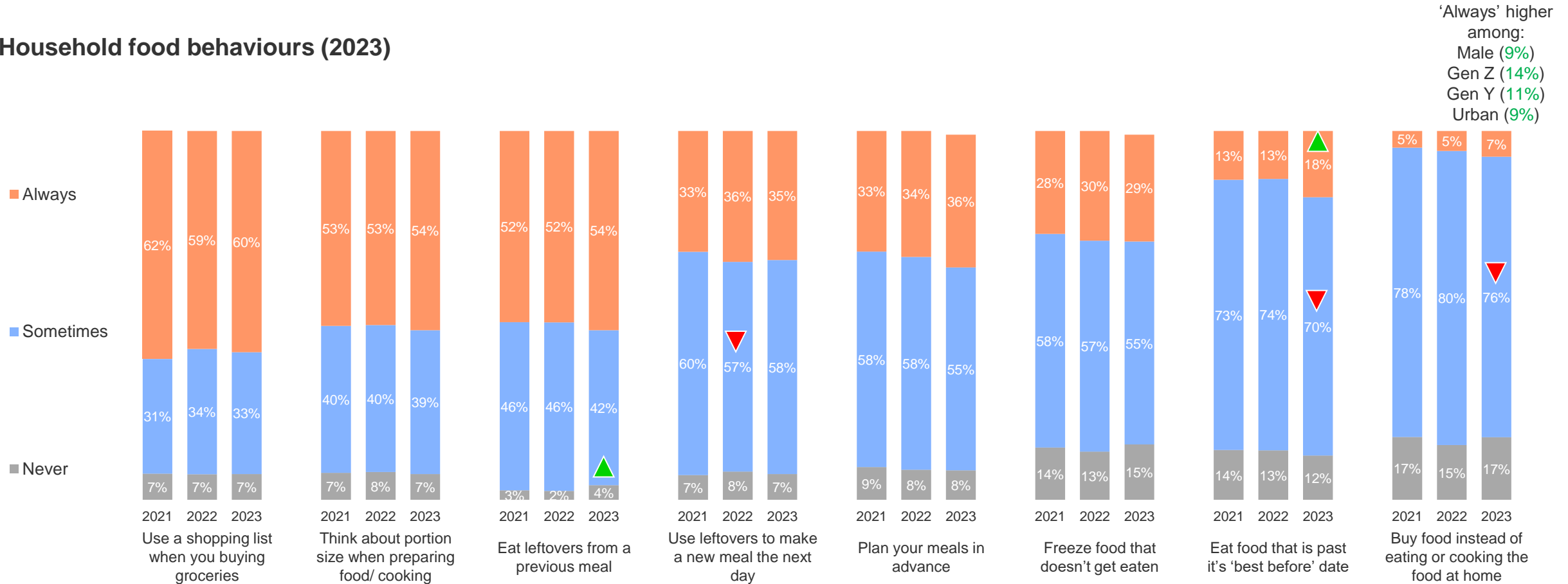
▲ ▼ Significantly higher/lower than previous year

NOTES:

1. Sample 2021 (n=1509), 2022 (n=1502), 2023 (n=1501)
2. Q "What is meant by the 'best before' date as it relates to food and drinks?"
3. Q "What is meant by the 'use by' date as it relates to food and drinks?"

Significantly more people are eating food that is past its 'best before' date. More people are also buying food instead of cooking at home mainly among males, urban dwellers, Gen Z, and Gen Y

Household food behaviours (2023)



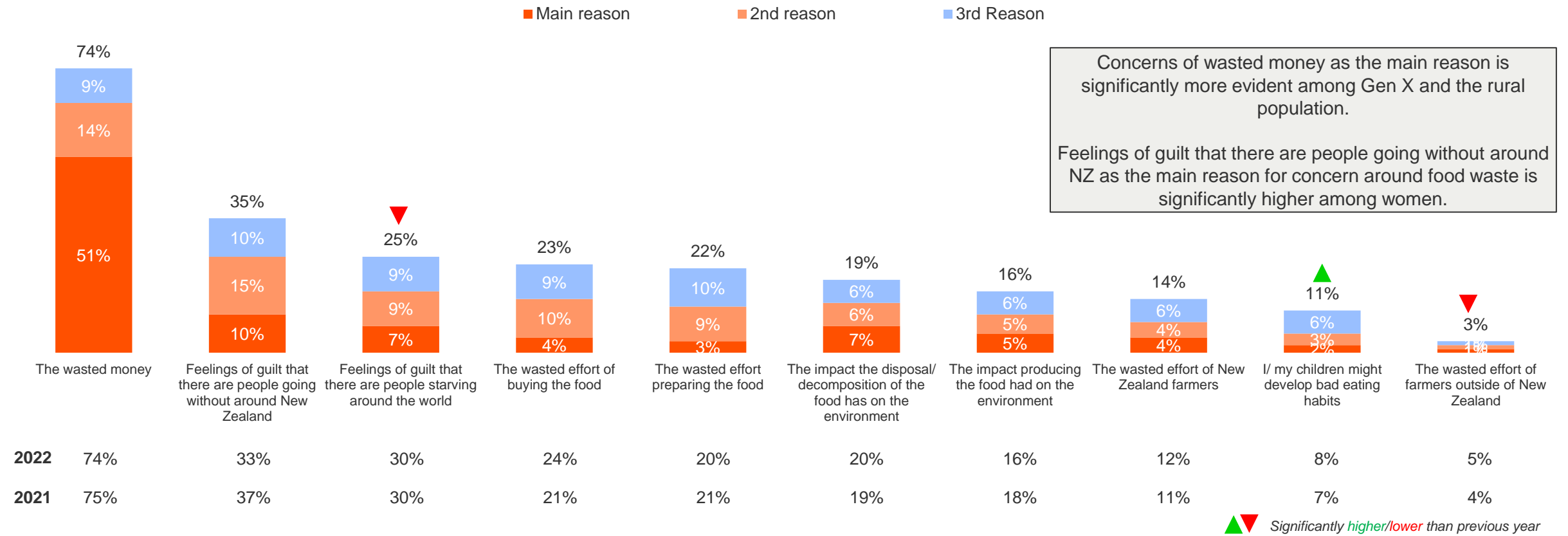
▲ ▼ Significantly higher/lower than previous year

NOTES:

1. Sample 2021 (n=1509), 2022 (n=1502), 2023 (n=1501)
2. Q "And how often does the following occur in your household?"

New Zealanders remain the most concerned about the wasted money resulting from food waste. Guilt around people going without enough food around the world saw significant decline

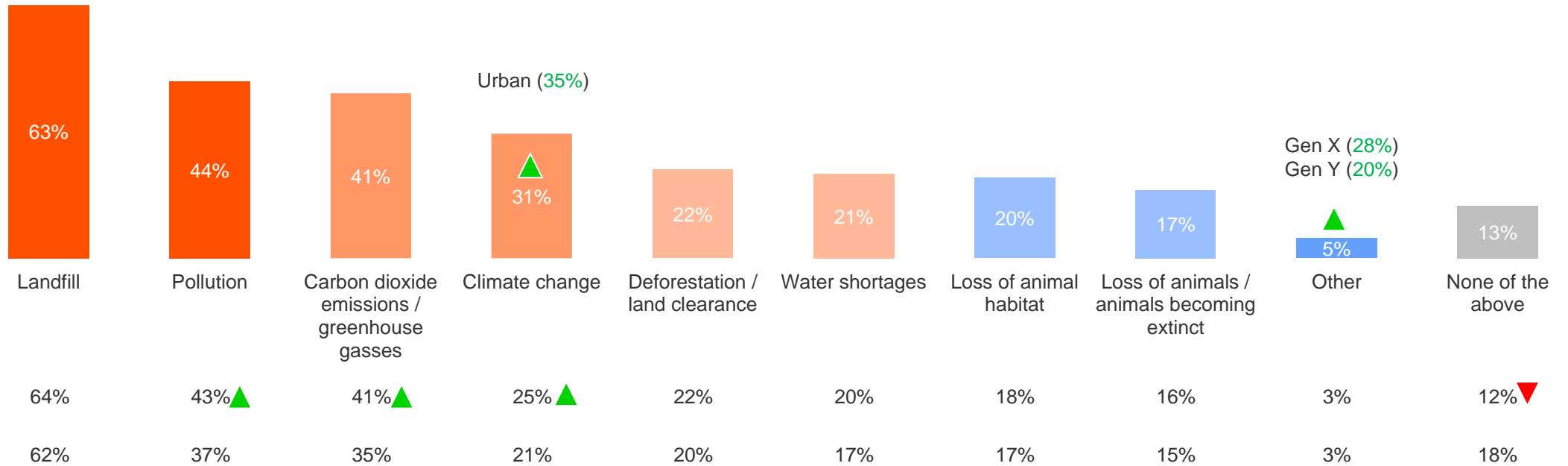
Concerns around food waste (2023)



Landfill is still perceived as most impacted by wasted food. Impact on climate change saw significant increase this year, while pollution and gas emissions maintained its level from 2022

Perceived impacts of food waste (2023)

Most cared about	33% (-4%) ▼	25% (NC)	22% (+1%)	25% (+5%) ▲	10% (NC)	9% (-3%) ▼	9% (-1%)	12% (+3%) ▲
Least cared about	30% (+3%)	19% (+1%)	19% (NC)	6% (+1%)	12% (+1%)	12% (+4%) ▲	11% (+3%) ▲	5% (-2%) ▼



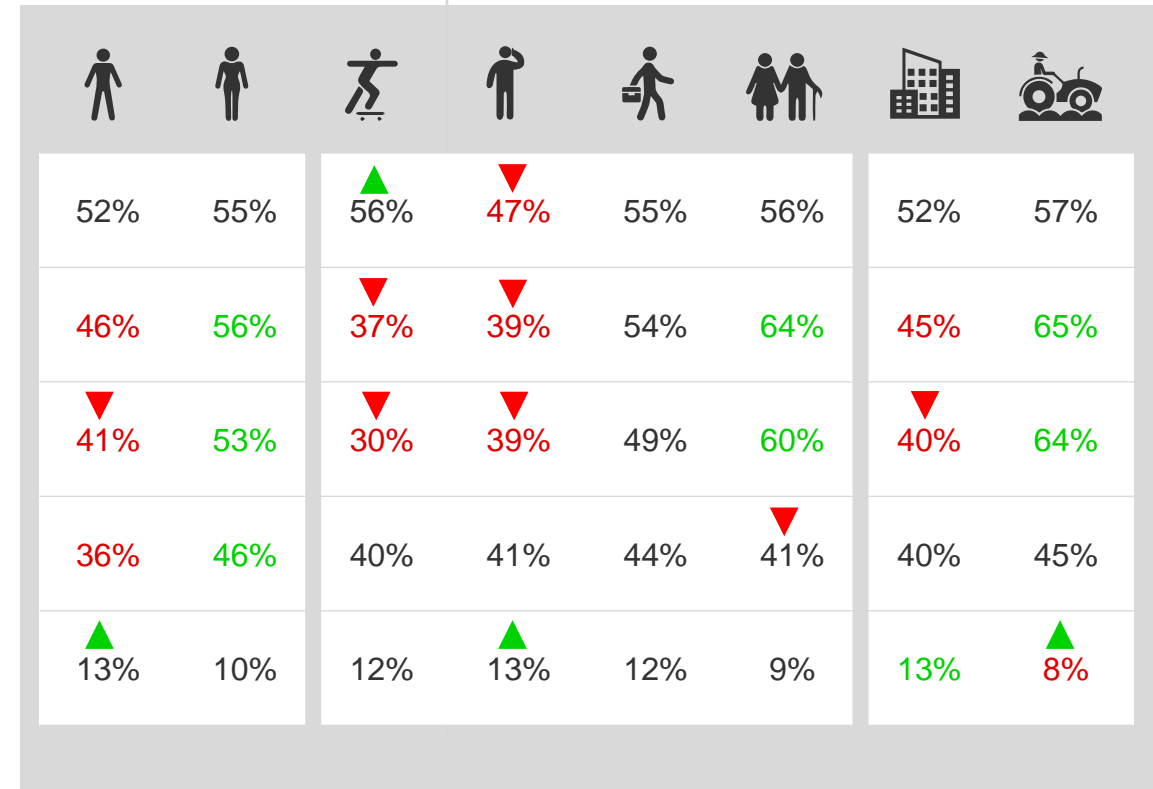
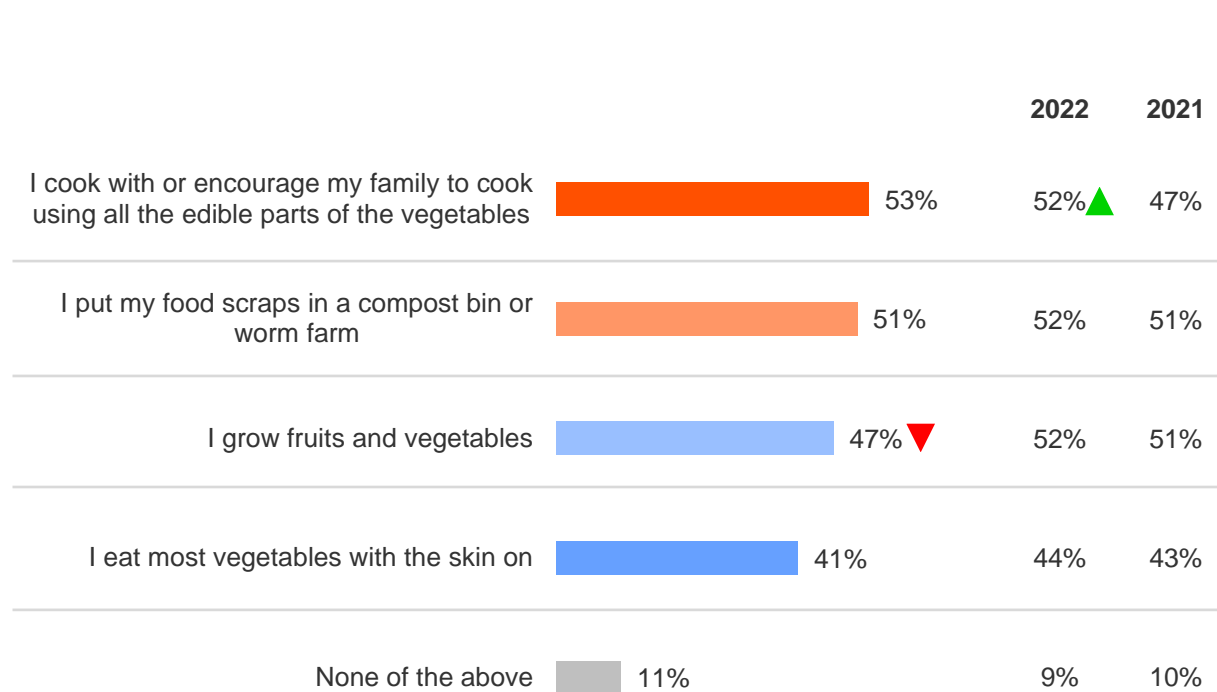
▲ ▼ Significantly higher/lower than previous year

NOTES:

1. Sample 2021 (n=1509), 2022 (n=1502), 2023 (n=1501)
2. Q "What do you believe are the impacts of food waste?"
3. Q "And which of these impacts do you care about the most and the least?"

Cooking using all edible parts and putting food scraps in compost bin or worm farms are the top actions, though fewer are growing their own fruits and vegetables. Men and Gen Y are more unlikely to take action to reduce food waste

Actions taken to reduce food waste (2023)



xx/xx Significantly higher/lower than total ▲▼ Significantly higher/lower than previous year

NOTES:

1. Sample 2021 (n=1509), 2022 (n=1502), 2023 (n=1501)
2. Q "At home, do you do any of the following to help reduce food waste?"

KANTAR **KIWIHARVEST** *Rabobank*

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