2026 GROCERY SUPPLIER SURVEY

For the Commerce Commission

Ipsos
May 2026

COMMERCE COMMISSION NEW ZEALAND
Te Komihana Tauhokohoko

ISO 20252 CERTIFIED

Ipsos

Background and Context

Under the Grocery Industry Competition Act 2023, the Commerce Commission has a responsibility to monitor and regulate the grocery sector – understanding perspectives, experiences, and activities is a key component of this work.

In 2024, the Commerce Commission undertook the first Grocery Supplier Survey, which provided key insights into suppliers' experiences and perspectives within the grocery sector. This second wave of the survey has been commissioned to help build on this foundation and uncover trends and issues within the sector.

This research report presents results from the second round of surveying (2026) and compares findings to results from 2024 (where applicable).

Objectives

The survey aimed to gather information across the grocery supplier sector to:

- Understand respondents' recent interactions with regulated grocery retailers
- Evaluate respondents' awareness of the Grocery Supply Code, the Grocery Industry Dispute Resolution Scheme, and the Commission's Anonymous Reporting Tool
- Examine the prevalence and satisfaction with levels of rebates, discounts, and payments in supply agreements, and compare terms between regulated grocery retailers and other retailers
- Gather feedback on the grocery supply agreements issued over the past year, including survey respondents' views on the fairness and clarity of these agreements
- Explore respondents' involvement in wholesale arrangements, including with regulated grocery retailers
- Collect respondent characteristics to identify potential correlations between these characteristics and survey responses

Methodology

Sample source

- This research was conducted via a 15-minute online survey that was sent to the Commerce Commission's supplier contact lists. These lists were provided by the regulated grocery retailers, who were required to share details of all their suppliers.
- The 2026 survey achieved 340 responses from over 4,000 contacts.
- Fieldwork was conducted from 17th February to 20th March 2026.

Respondents

- Grocery suppliers – excluding those who supply only alcoholic drinks (which is not included in the scope of the Grocery Industry Competition Act 2023).

Notes

- This report also presents results from the 2024 online survey, where questions are comparable with those asked in 2026.
- All survey questions were optional to ensure that respondents only needed to answer the ones they felt comfortable with.
- Fieldwork was conducted during the transition period after changes to the Supply Code had been determined, but before they came into full force. It also occurred prior to any fuel-related conflict or impacts.
- Significant differences are reported at 95% confidence. **Green** indicates that the percentage is significantly higher than the previous survey/total results, whilst **red** indicates it is significantly lower.
- Where results do not sum to 100%, this may be due to rounding, multiple responses, or the exclusion of '*no answer*' responses.
- The maximum margin of error, at the 95% confidence level, is ±5.1%.

Summary of key changes to the 2026 survey

Type of change	Question	Change
Re-worded questions	Retail banners	*The timeframe for banners supplied to was extended to be specifically in the last 12 months.*
	Groceries supplied	*We now ask about 'groceries' supplied rather than 'products' supplied.*
	Visibility of cost of rebates	*This was expanded to now ask about visibility of costs before entering into supply agreements, not just certainty of costs.*
	Satisfaction with value of rebates	*'Value' has been specifically defined as being about receiving information & having certainty that activities are being performed.*
New response options added	*Several answer options were added to questions this year where detail was sought on issues. These were identified by common themes in open-ended 'Other (specify)' responses. In the report, they are not shown as a significant increase from 2024 data, as answers were given but cannot be quantified.*	
New questions added	Supply agreements	*The comparison of terms & conditions between RGRs and other suppliers has been re-worded into a new question that enables us to differentiate if the conditions are better or worse. New questions have also been added to explore supply agreement negotiations.*
	Wholesalers	*The wholesalers question set has been expanded to include new topics such as information provided by wholesalers & factors affecting the cost to serve wholesalers.*
	Rebates, discounts and payments	*The list of rebates, discounts & payments in place with retailers has been fully expanded and reworked to add more detail. This question is not comparable to 2024 because of the extent of changes made.*

Note: *A full detailed list of all changes made in 2026 can be found in the Appendix.*

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KEY FINDINGS AND HIGH-LEVEL COMPARISONS TO 2024

01

Summary of key findings (i)

Initial research in 2024 found high level of engagement between suppliers and regulated grocery retailers (RGRs), with more than half supplying all three.

Survey respondents had mixed experiences and low confidence in negotiating agreements.

Whilst awareness of the Grocery Supply Code and reporting tools is high, few respondents reported feeling familiar with the Code.

In 2026, the picture has not changed significantly. Respondents commonly have relationships with multiple RGRs, but experiences remain mixed and confidence in negotiating is still low.

Most report their experiences are unchanged in the past year, and whilst the proportion reporting issues has increased, there are few individual issues that have become more common.

Summary of key findings (ii)

Experiences

- Experiences with RGRs aren't significantly more positive or negative in 2026 than in 2024 – they remain mixed.
- Where experiences have changed, there has been more growth in negative perceptions than positive ones, and more respondents perceive these experiences as *declining* rather than improving.
- Confidence in negotiating with RGRs remains low.

Issues faced

- Whilst the proportion stating that they've experienced issues is significantly higher in 2026, the areas where these are occurring haven't changed significantly.
- Issues with obtaining data and insights from RGRs have become significantly more common in 2026.
- When suppliers seek resolution, satisfaction with outcomes is generally the same as in 2024.

Code awareness

- Awareness of the Grocery Supply Code is higher in 2026 than 2024, but only because more respondents have heard of it.
- Growth in awareness is greater in larger organisations. Those in smaller organisations may not as easily find the time or resources to look into the Code.
- The proportion of suppliers trying to find information online is lower in 2026, which may contribute to growth in awareness, without greater familiarity.

83%

Over 4-in-5 say they've **faced an issue** in the last year

Pricing and delisting continue to drive most issues

1 **Pricing | 52%**

2 **Delisting | 50%**

3 **Communication issues | 38%**

4 **Data insights access | 29%▲**

5 **Not enough stock | 27%**

***Top 5 most common types of issue** selected by respondents in 2026

PROFILE OF RESPONDENTS

02

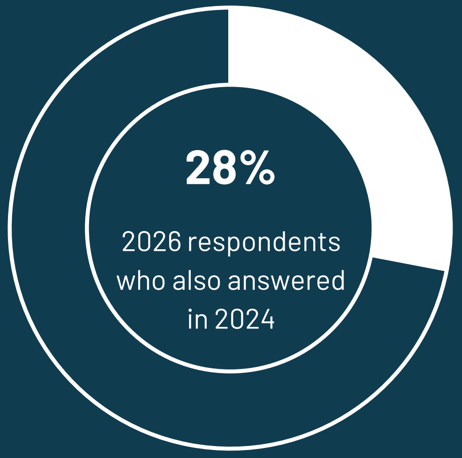
Key findings:
Profiling of respondents

The profile of grocery supplier businesses responding to the survey did not differ significantly from 2024 to 2026.

Around 3-in-5 survey respondents indicated relationships with all three RGRs, and on average, more than half of supply goes to RGRs.

Variance in relationships according to FTE size was apparent in both years: smaller businesses in 2024 and 2026 were less likely to supply all three RGRs, with single-RGR relationships more common in this group.

The share of supply from businesses to each RGR remains relatively unchanged from 2024.

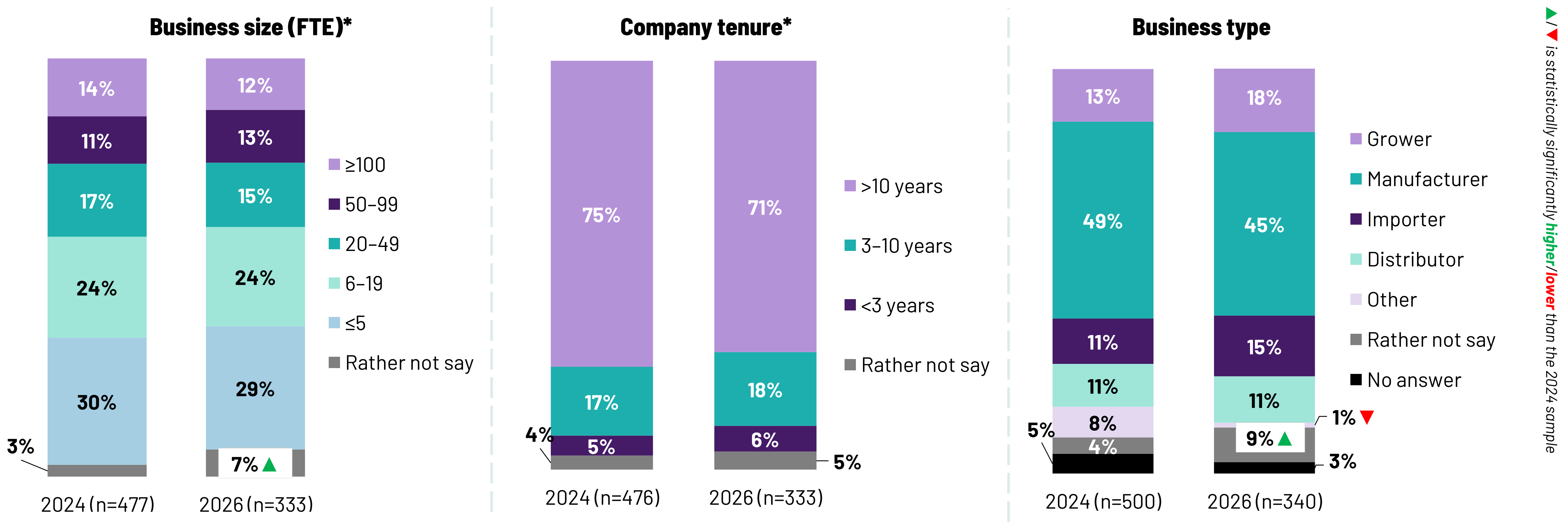


	2024	2026
Total number of supplier responses*	500	340
Approx. mean business size (FTE)	c. 29 Employees	c. 30 Employees
Approx. mean annual turnover	c. $17.7m	c. $19.7m
%supplying all three RGRs	58%	61%
%total product sales to RGRs	54%	57%

*Response count in 2024 excludes responding suppliers who supply alcohol products only, in order to align with 2026 sample

Sample profiling & trends (i)

The profile of businesses responding in 2026 does not differ significantly from that of 2024, with the largest groups responding being smaller businesses active for more than 10 years and in the manufacturing sector.



How many full-time employees, including yourself, does the company have? / How long has the company been operating? / What type of business are you?

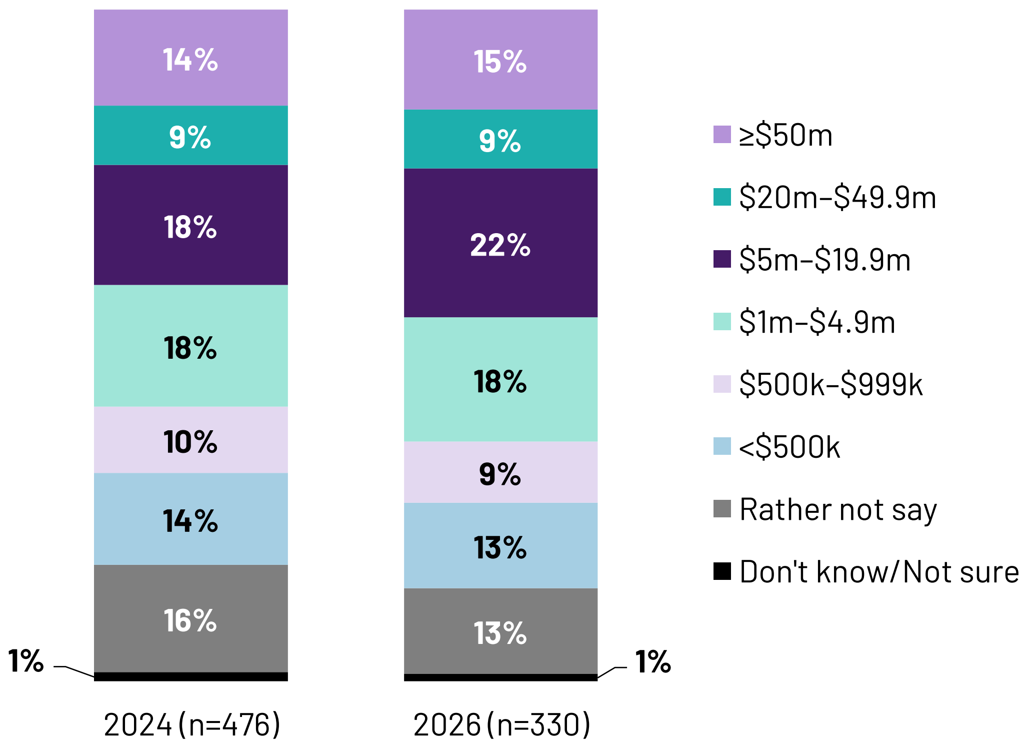
Base: *Total sample – base sizes in chart.* ****Note:*** *Rebased to exclude 'no answer'.*

Please note: *Businesses that supply alcoholic drinks only were excluded from the 2026 survey. For purposes of comparability, analysis of 2024 data also excludes these types of businesses. In some cases, 2024 data will differ from what was reported in 2024.*

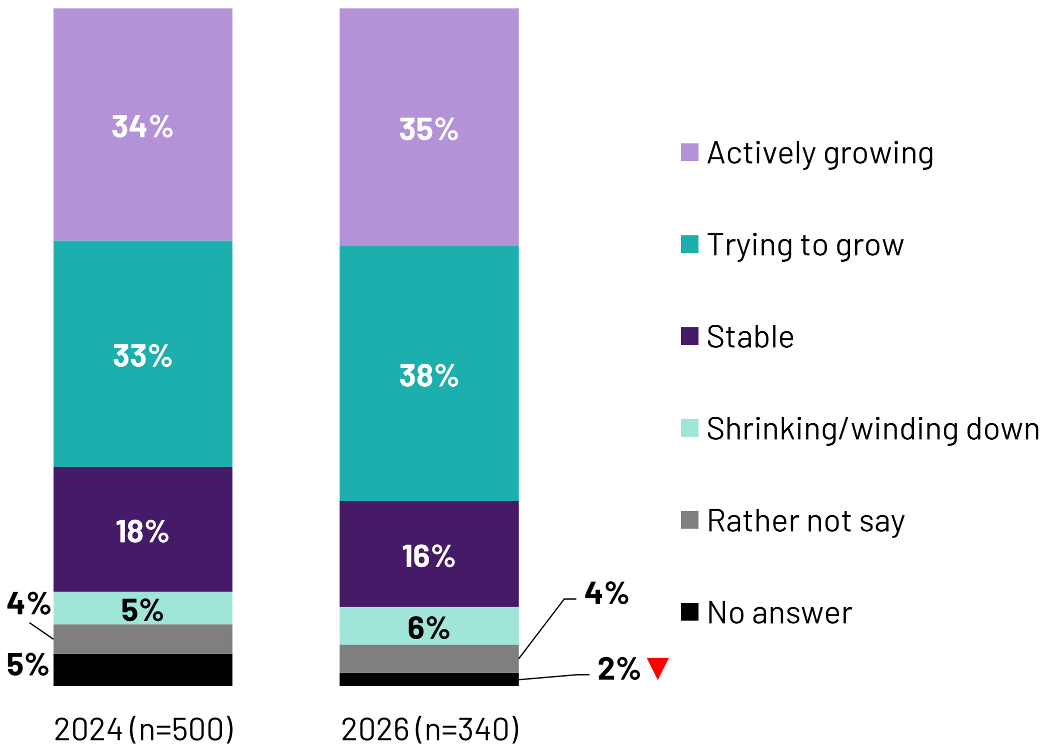
Sample profiling & trends (ii)

Whilst 2026 saw a slightly larger share of responding suppliers with turnover above $1m, the profile by turnover did not differ significantly. In both years, the majority of respondents stated that they were at least trying to grow.

Company turnover*



Company stage



▲/▼ is statistically significantly *higher*/*lower* than the 2024 sample

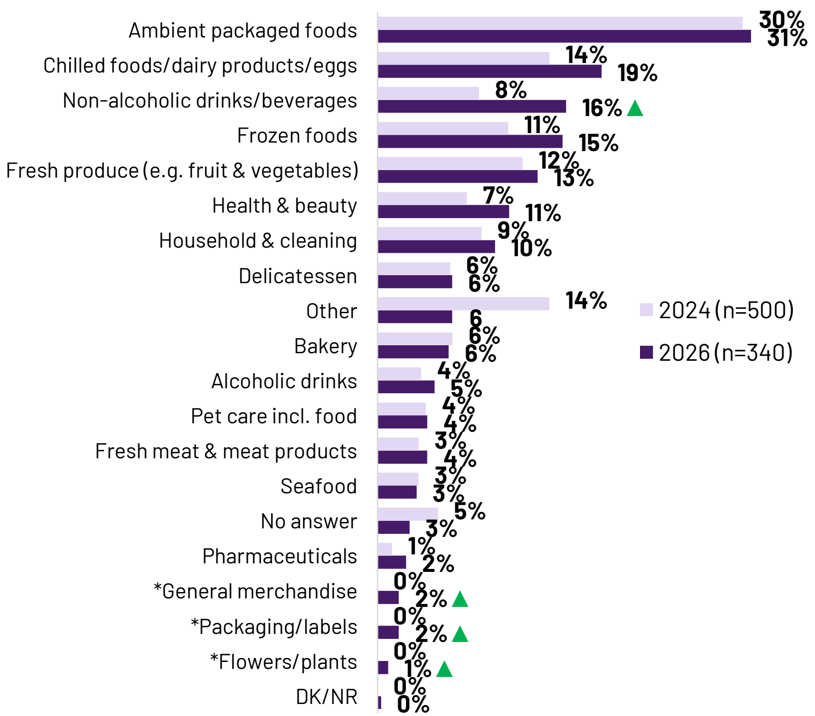
What's your company's annual turnover? / What stage is the business at?
Base: *Total sample – base sizes in chart.* ***Note:*** *Rebased to exclude 'no answer'.*

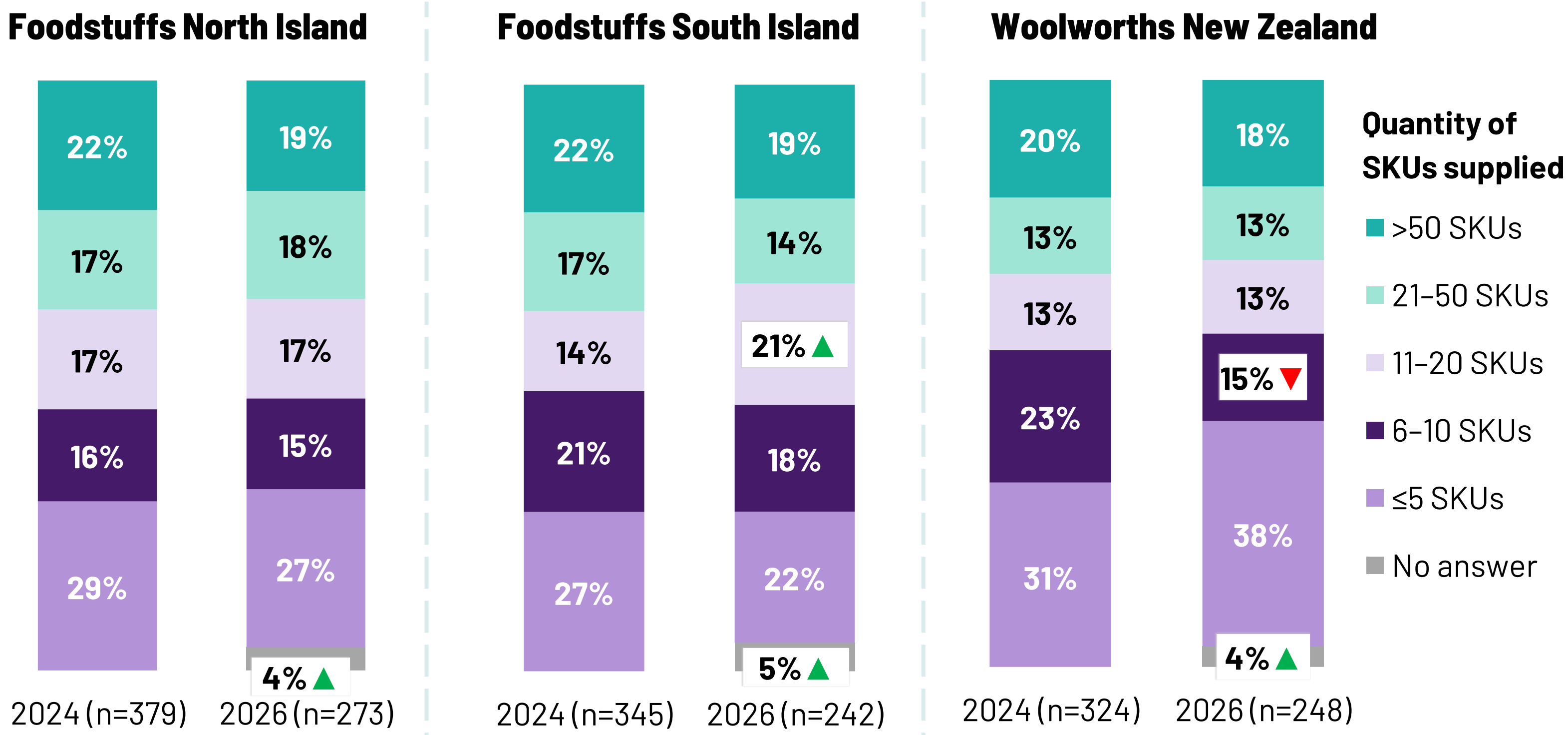
Please note: *Businesses that supply alcoholic drinks only were excluded from the 2026 survey. For purposes of comparability, analysis of 2024 data also excludes these types of businesses. In some cases, 2024 data will differ from what was reported in 2024.*

Sample profiling – supply of groceries

In 2026, a significantly higher share of businesses supply non-alcoholic beverages, but generally respondents in 2026 provide a similar array of goods to respondents in 2024.

Suppliers we heard from in 2026 are, on average, providing slightly fewer SKUs to each RGR than in 2024.





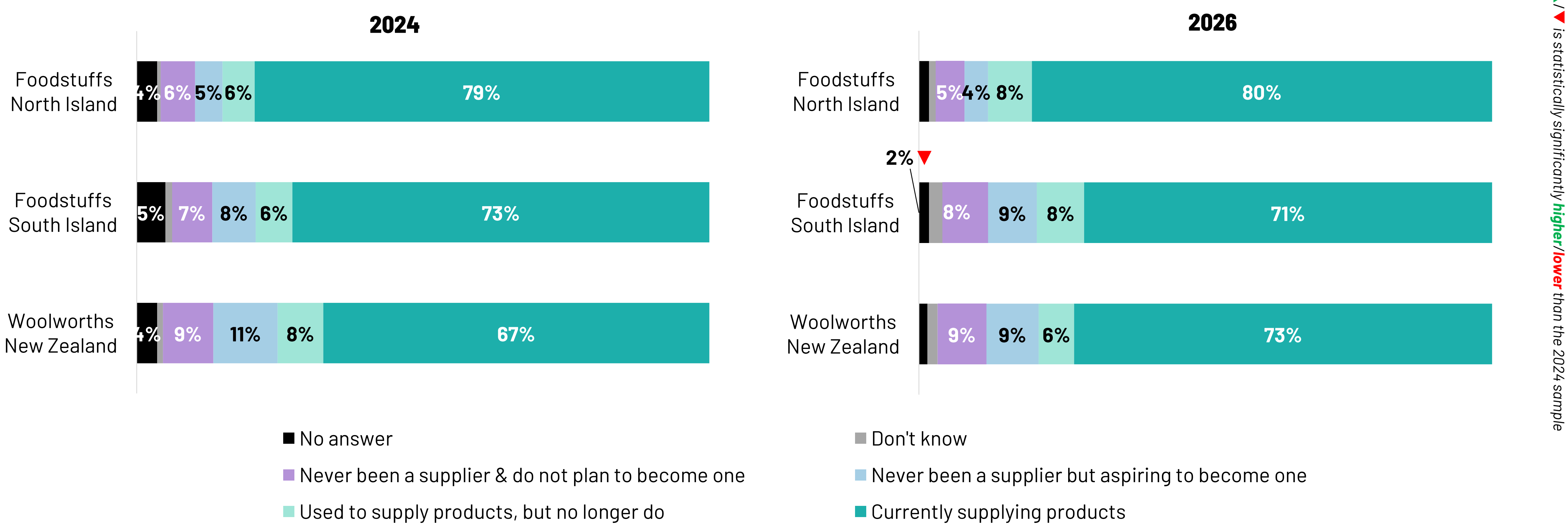
▲/▼ is statistically significantly higher/lower than the 2024 sample

What groceries do you supply to grocery retailers and/or wholesalers? / How many SKUs do you supply to [INSERT RGR ONE AT A TIME]?

***Base:** Total sample / Currently supplying Foodstuffs North Island / Foodstuffs South Island / Woolworths New Zealand – base sizes in chart. ***Note:** Product supply answer options expanded to include these products, as they were common 'other' answers in 2024. Businesses in these categories are, therefore, included in 'other' in 2024 data.*

Sample profiling – supply of products

The proportion of respondents reporting that they supply Woolworths New Zealand is higher in 2026.

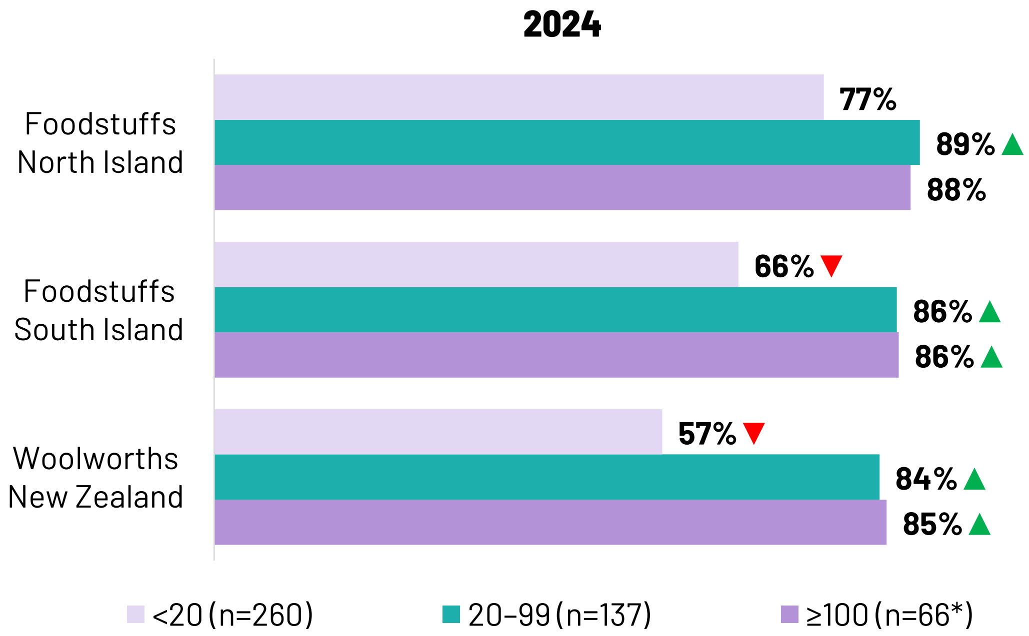


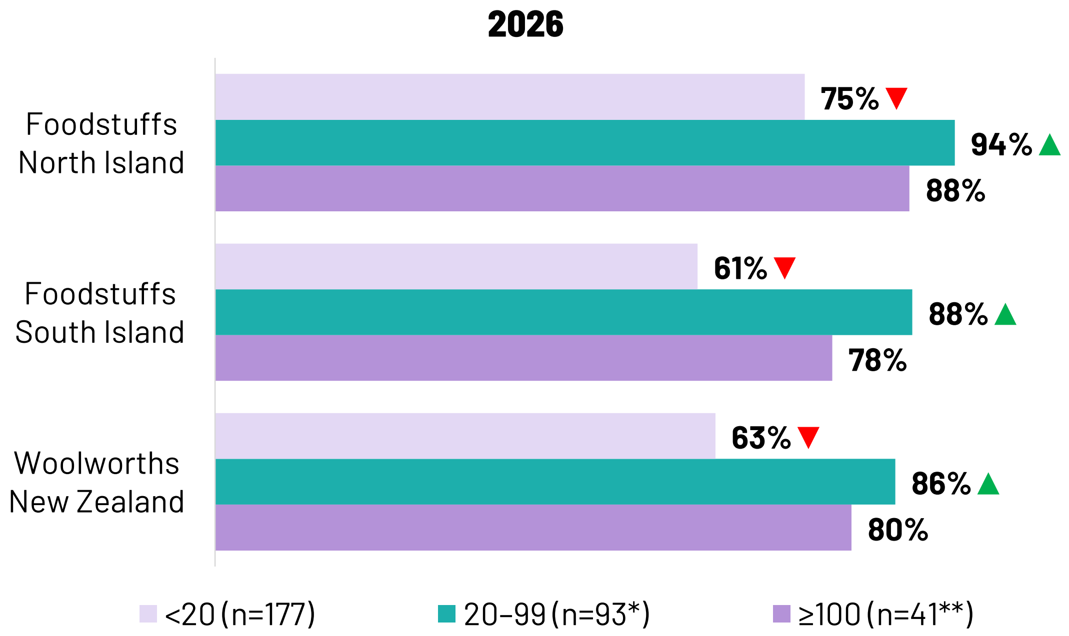
Which of the following best describes your current relationship with [INSERT RGR ONE AT A TIME]?

Base: *Total sample – 2024 (n=500), 2026 (n=340)*

RGR supply by business size

In 2024 and 2026, smaller businesses were less likely than others to report supplying each RGR. Smaller businesses are less likely to report relationships with *multiple* RGRs.





▲/▼ is statistically significantly higher/lower than the total sample

% supplying *all 3* RGRs – by business size (FTEs)	<20	20-99	≥100
2024	**45%**	**72%**	**72%**
2026	**46%**	**80%**	**74%**

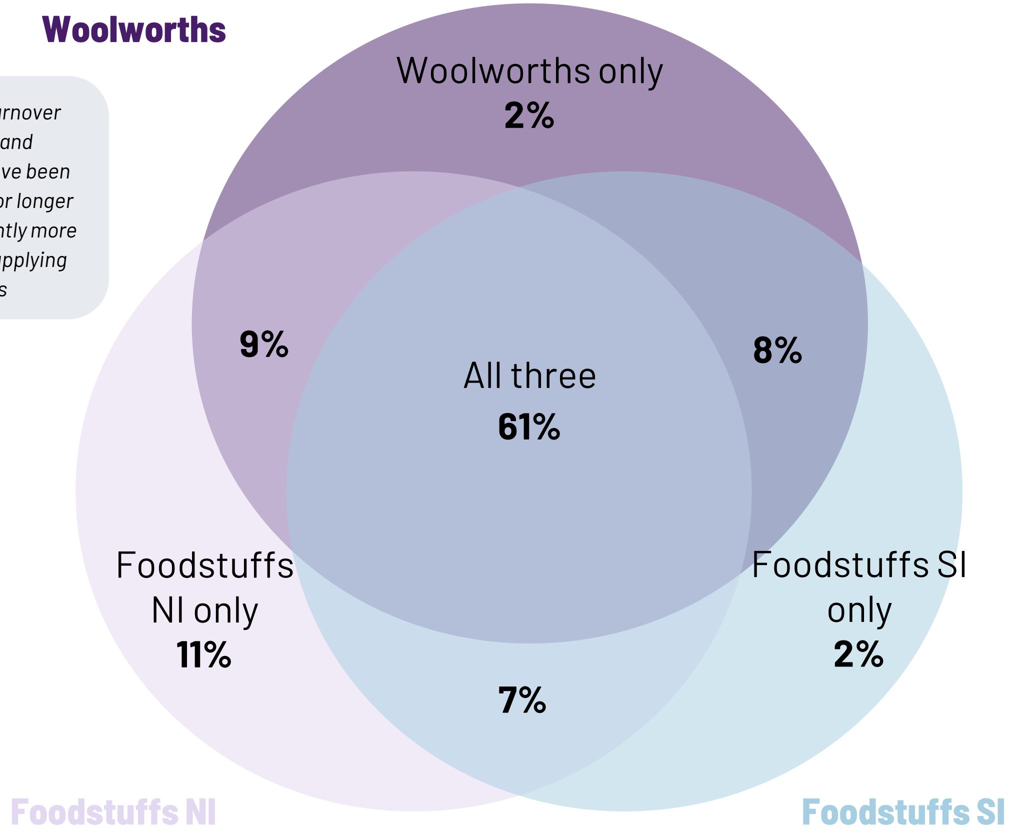
Which of the following best describes your current relationship with [INSERT RGR ONE AT A TIME]? / How many full-time employees, including yourself, does the company have?

Base: *Total sample (split by business size) – base sizes in chart.* ****CAUTION:*** *Low base (50≤ n <100).* *****CAUTION:*** *Very low base, indicative results only (n<50).*

Overlap of supply to RGRs

6-in-10 respondents are supplying all three RGRs, with a minority reporting a relationship with one RGR only. This has been relatively consistent from 2024 to 2026.

Note: *High turnover respondents and those who have been in business for longer are significantly more likely to be supplying all three RGRs*



RGR supply mix

Regulated grocery retailers supplied to	2024	2026
Woolworths only	6%	2% ▼
Woolworths and Foodstuffs NI	5%	9% ▲
Woolworths and Foodstuffs SI	4%	8% ▲
Foodstuffs NI and Foodstuffs SI	13%	7% ▼
Foodstuffs NI only	10%	11%
Foodstuffs SI only	3%	2%
Supplying all three	58%	61%

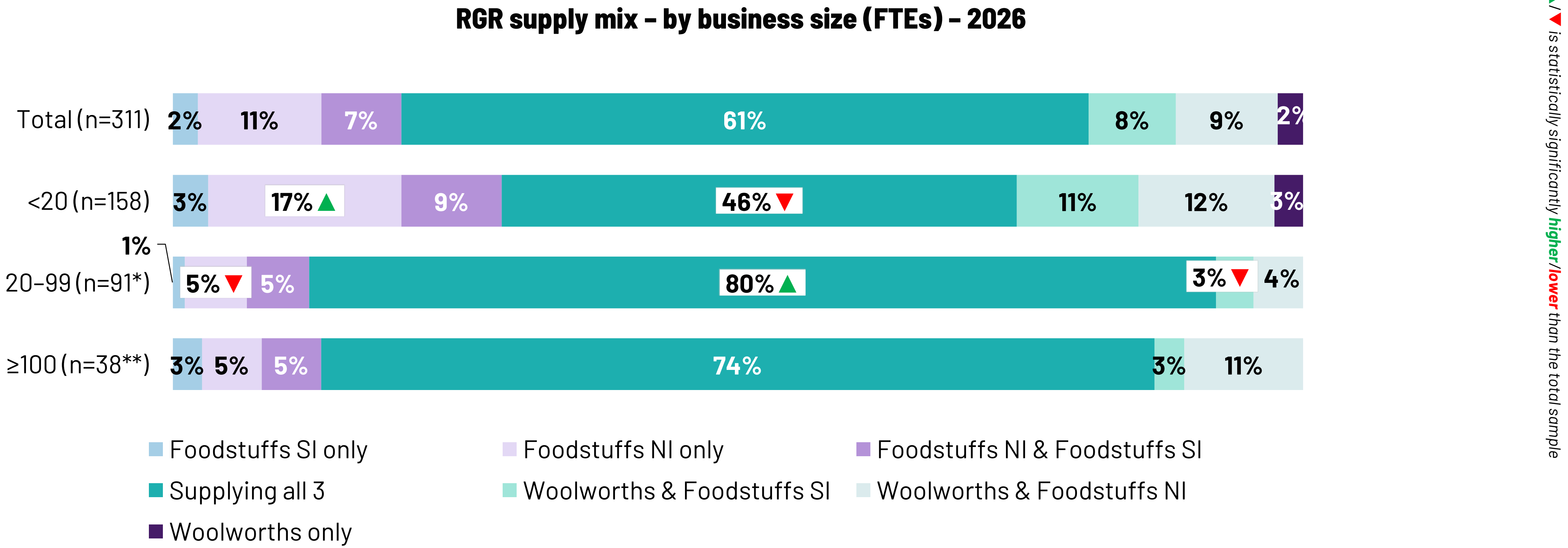
▲/▼ is statistically significantly higher/lower than the 2024 sample

Which of the following best describes your current relationship with [INSERT RGR ONE AT A TIME]?

***Base:** Currently supplying Foodstuffs North Island / Foodstuffs South Island / Woolworths New Zealand – **2024** (n=460), **2026** (n=311)*

Who supplies RGRs?

Medium-sized suppliers are the most likely to report a relationship with all three RGRs. Almost a quarter of survey respondents from smaller businesses report supplying only one of the three.



Which of the following best describes your current relationship with [INSERT RGR ONE AT A TIME]? / How many full-time employees, including yourself, does the company have?

Base: *Currently supplying Foodstuffs North Island / Foodstuffs South Island / Woolworths New Zealand (split by business size) – base sizes in chart.* ****CAUTION:*** *Low base (50≤ n <100).* *****CAUTION:*** *Very low base, indicative results only (n<50).*

Retail banners

As in 2024, survey respondents tend to cater to multiple different banners within each RGR. The closure of a number of Raeward Fresh locations would contribute to the significant decrease in suppliers reporting supplying this banner.

Foodstuffs North Island	2024	2026
New World	87%	92% ▲
Pak'nSave	78%	87% ▲
Four Square	74%	74%

Foodstuffs South Island	2024	2026
New World	89%	93%
Pak'nSave	78%	83%
Four Square	75%	73%
Raeward Fresh*	51%	33% ▼
On the Spot	23%	31% ▲

Woolworths New Zealand	2024	2026
Fresh Choice	84%	88%
Woolworths/ Countdown	80%	83%
Supervalue	67%	62%

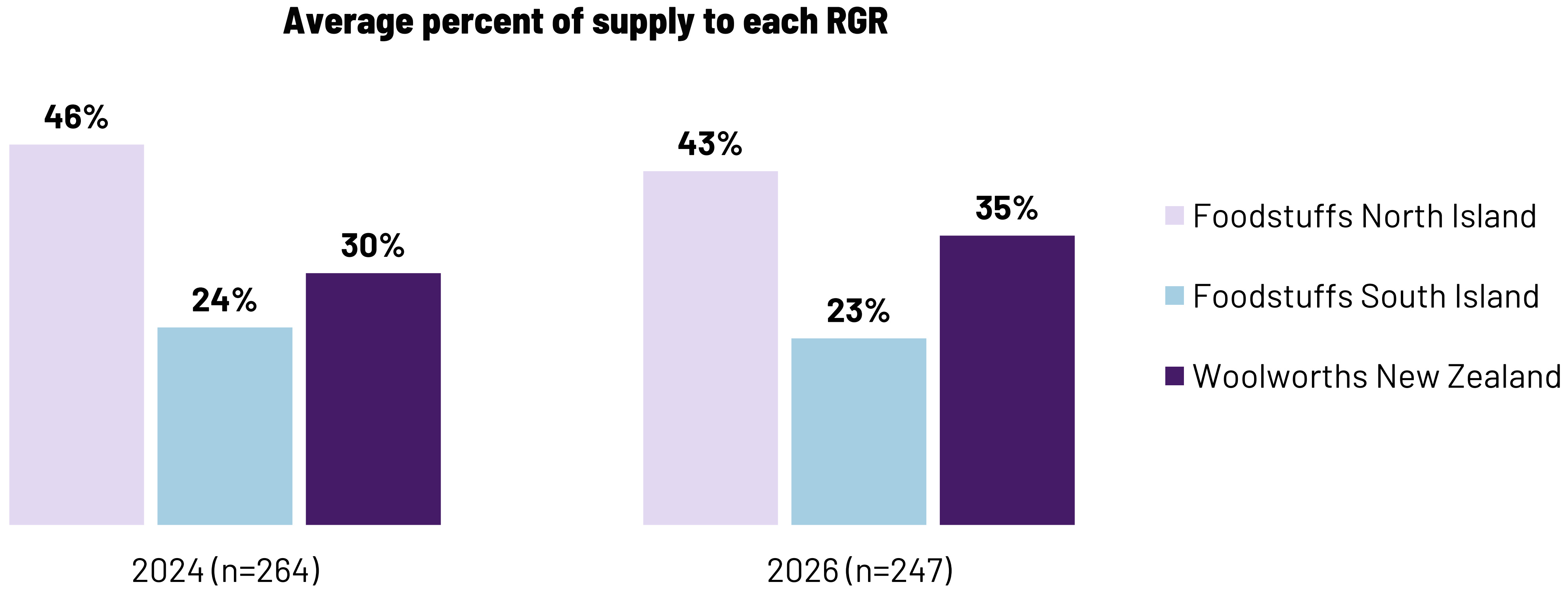
▲/▼ is statistically significantly **higher**/**lower** than the 2024 sample

Which retail banners do you supply products to, or have supplied products to in the last 12 months?

Base: *Currently supplying to:* ***Foodstuffs North Island*** *– 2024 (n=397), 2026 (n=273);* ***Foodstuffs South Island*** *– 2024 (n=364), 2026 (n=242);* ***Woolworths New Zealand*** *– 2024 (n=337), 2026 (n=248).* ****Note:*** *All Raeward Fresh stores are now closed as of 23 May 2025.*

RGRs as share of total supply

In 2026, supply share is largely unchanged compared to 2024, with no significant changes and Foodstuffs North Island receiving the largest share of supply.



▲/▼ is statistically significantly higher/lower than the 2024 sample

What percentage of your sales to regulated grocery retailers goes to each of the following?

Base: *Currently supplying to more than one RGR and provided an answer – base sizes in chart.*

RGR reliance

There has been no significant change over time in the proportion of supply that goes to RGRs overall. In both 2024 and 2026, survey respondents reported that a little over half of their production was supplied to RGRs. Respondents from smaller businesses continue to supply the lowest percentage of their output to RGRs.

	Average share of sales to RGRS	
Sample – Total and by business size (FTEs)	**2024**	**2026**
Total sample	**54%**	**57%**
≥100	**57%**	**66%**
20–99	**57%**	**62%**
<20	**50%**	**51%**

Approximately, what percentage of your total product sales are to Regulated Grocery Retailers (RGRs) versus others?

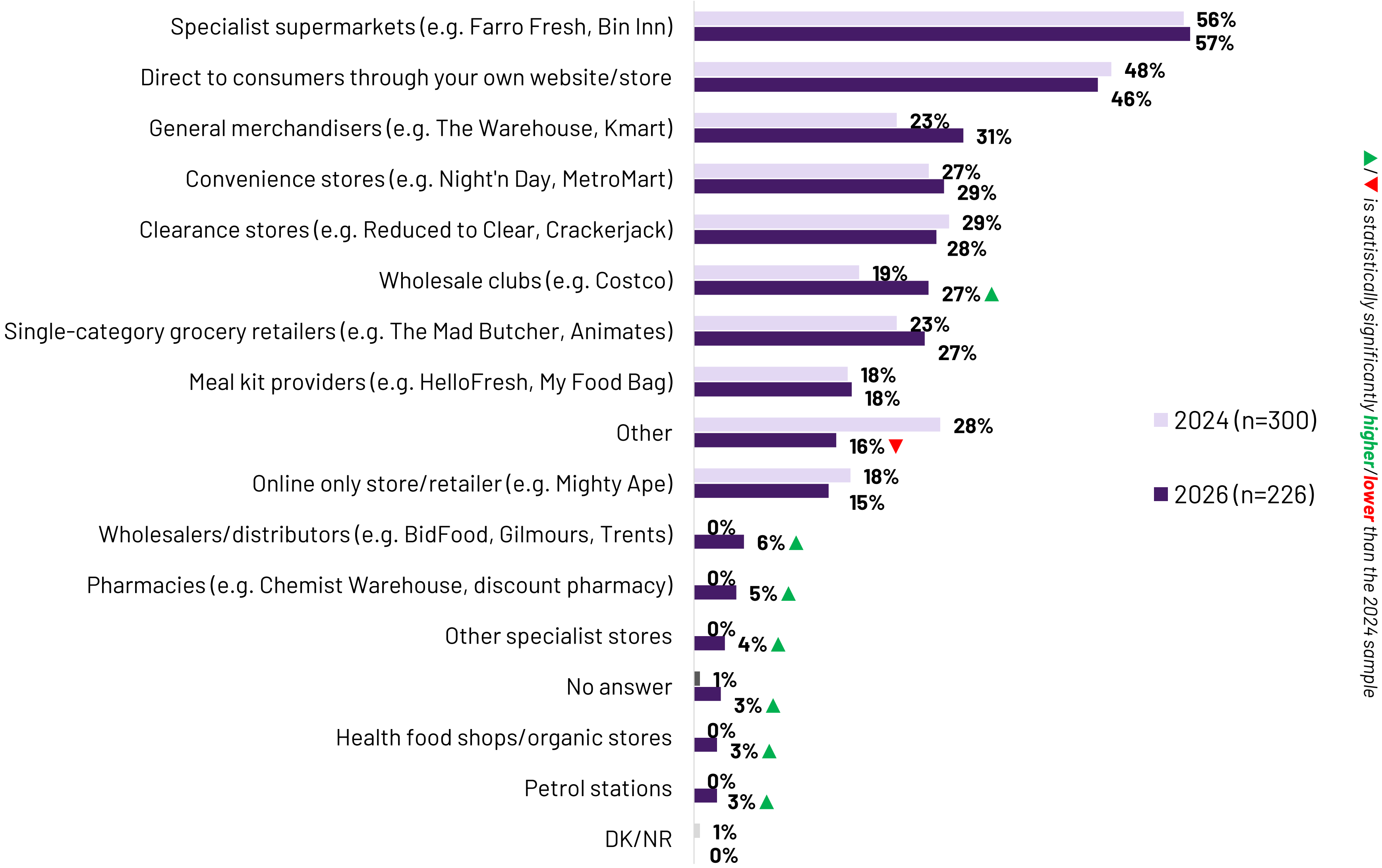
Base: *Currently supplying at least one RGR and provided an answer – 2024 (n=389), 2026 (n=295).*

Other retailers

As in 2024, more than half of survey respondents have a relationship with specialist supermarkets and almost half supply direct to consumers themselves.

There has been a significant increase in supply to wholesale clubs.

Other retailers supplied



And who else do you supply products to?

***Base:** Those who supply to other retailers – base sizes in chart. ***Note:** Hospitality was catered to by 56% of suppliers in 2024, but in 2026 this question focused on retailers only.*

EXPERIENCES
(INCLUDING SUPPLY AGREEMENTS)

03

Key findings: Experiences

Experiences with RGRs have not changed significantly between 2024 and 2026.

There have been declines in RGR experience ratings in some areas, particularly for those in relationships with Foodstuffs North Island and Woolworths New Zealand.

Across overall experience, fairness, ease of dealing, and confidence negotiating with each RGR, more suppliers indicate that experiences have declined rather than improved.

This perception is largely reflected in trends over the 2 years, with an increase in negative experiences and decrease in positive ones.

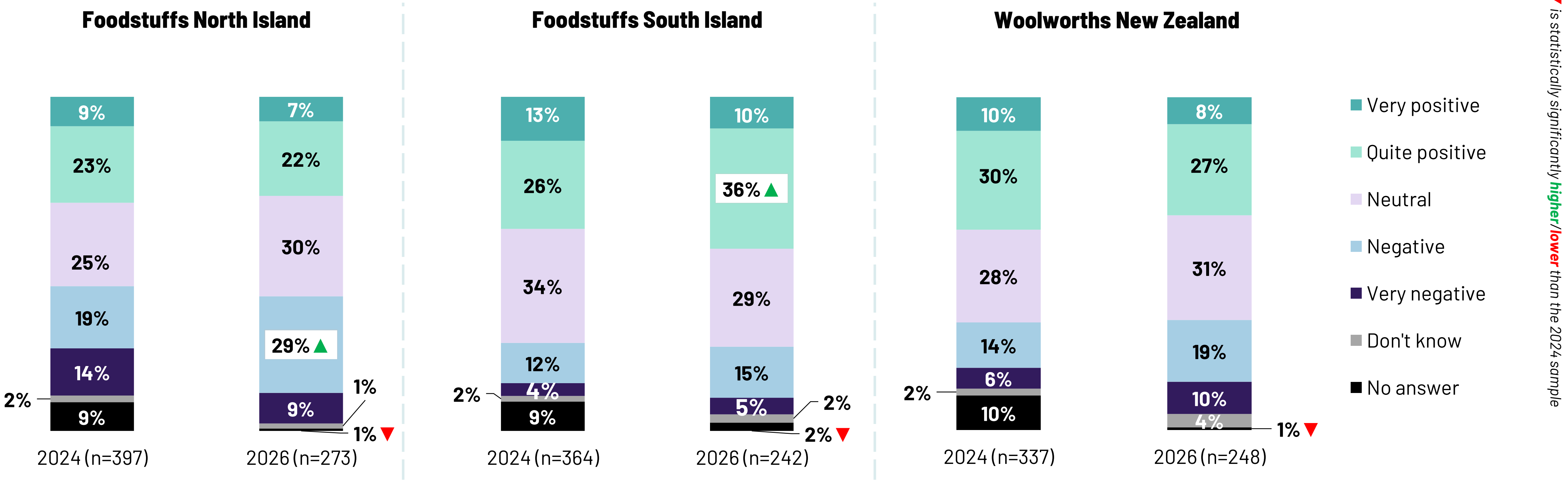
Where experiences are positive, respondents reference *ease of use*, *communications*, and *relationship management* as drivers of that positivity.

When suppliers see their experiences as negative, reasons are more diverse and varied by RGR. *Margins* are the main reason for negative relationships with Woolworths New Zealand, *pricing* most cited for Foodstuffs North Island, whereas for Foodstuffs South Island suppliers, it is *communication* and *contact*.

	Respondents having positive engagement experience	
RGR	**2024**	**2026**
Foodstuffs North Island	32%	30%
Foodstuffs South Island	37%	35%
Woolworths New Zealand	40%	35%

Overall experience trends

Overall experience ratings for most RGRs have not changed significantly since 2024. However, there has been a significant increase in 'negative' experiences with Foodstuffs North Island & in 'quite positive' experiences with Foodstuffs South Island.



Thinking about the past year, how would you rate... Your overall experience with [INSERT RGR]

Base: *All suppliers with a relationship with each RGR in each year – base sizes in chart.*

Reasons for positive experiences

Ease of use and communication are the most frequently cited reasons for a positive experience with RGRs. Respondents also seem to value relationship management, with some citing collaboration within these relationships as a reason for positivity.

Foodstuffs North Island (n=81*)

Top-5 positive reasons mentioned	
Communication/contact	**26%**
Ease of use	**25%**
Relationships/interactions	**17%**
Service/customer service	**11%**
Teams/categories/category personnel	**11%**

Foodstuffs South Island (n=110)

Top-5 positive reasons mentioned	
Ease of use	**31%**
Communication/contact	**18%**
Relationships/interactions	**17%**
Collaboration	**15%**
Positive relative to FSNI / Woolworths NZ	**14%**

Woolworths New Zealand (n=88*)

Top-5 positive reasons mentioned	
Ease of use	**31%**
Communication/contact	**17%**
Relationships/interactions	**17%**
Collaboration	**15%**
Transparency	**14%**

And why would you rate your overall experience with [INSERT RGR][INSERT RATING]

Base: *Suppliers positive about their experience with each RGR in 2026 – bases sizes in tables.* ****CAUTION:*** *Low base (50≤ n <100).* ***Note:*** *Topics mentioned by <5% suppressed from analysis.*

Reasons for negative experiences

Respondents who rate their experience as negative give reasons that vary more by RGR, but margins, costs, pricing & product issues are among the most cited.

Foodstuffs North Island (n=104)

Top-5 negative reasons mentioned	
Pricing	**26%**
Products	**26%**
Margins	**24%**
Communications/contact	**20%**
Decision-making	**20%**

Foodstuffs South Island (n=49)**

Top-5 negative reasons mentioned	
Communications/contact	**31%**
Decision-making	**22%**
Margins	**20%**
Costs	**18%**
Products	**18%**

Woolworths New Zealand (n=70*)

Top-5 negative reasons mentioned	
Margins	**34%**
Products	**34%**
Pricing	**24%**
Decision-making	**23%**
Reviews	**17%**

And why would you rate your overall experience with [INSERT RGR] [INSERT RATING]

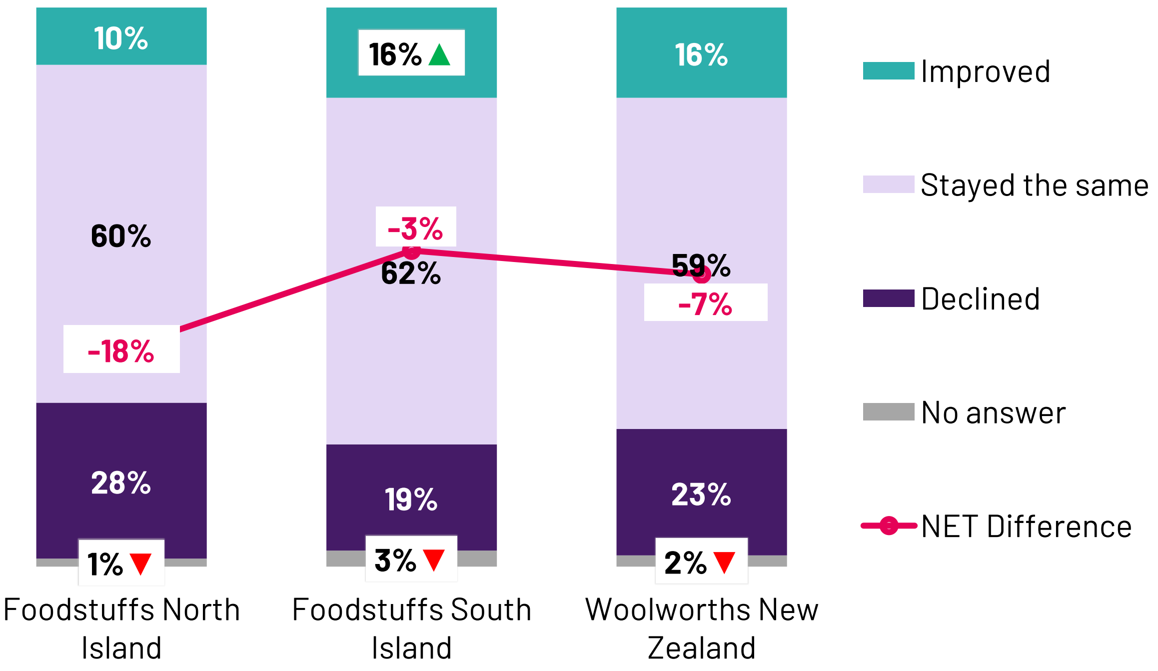
***Base:** Suppliers negative about their experience with each RGR in 2026 – bases sizes in chart. ***CAUTION:** Low base (50≤ n <100). ****CAUTION:** Very low base, indicative results only (n<50). **Note:** Topics mentioned by <5% suppressed from analysis.*

Stated change vs observed trends in overall experience

The majority of respondents to the survey (around 6 in 10) did not report a change in their overall experience with RGRs. For those who did, most reported this as a decline. There has been a decline in actual ratings for Foodstuffs North Island and Woolworths New Zealand, but not Foodstuffs South Island.

▲/▼ is statistically significantly *higher*/*lower* than the total sample

Change in overall experience



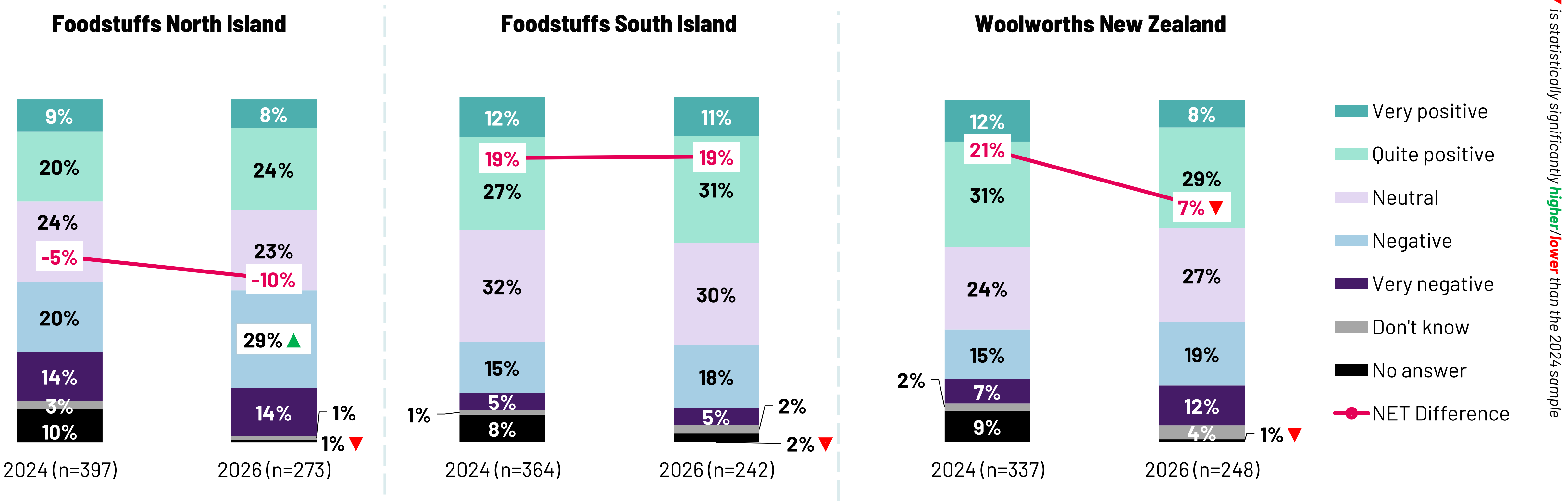
NET difference in experience with RGRs – by year	2024	2026	Change from 2024
Foodstuffs North Island	-1%	-8%	▼ -7
Foodstuffs South Island	24%	25%	▲ +1
Woolworths New Zealand	20%	7%	▼ -13

How have the following aspects changed over the past year? Your overall experience with [RGR] / Thinking about the past year, how would you rate... Your overall experience with [RGR]

Base: *All suppliers with a relationship with – Foodstuffs North Island (n=273), Foodstuffs South Island (n=242), Woolworths New Zealand (n=248)*

Ease of dealing trends

Where changes have been reported in ease of dealing with RGRs since 2024, relationships have shifted in a more negative direction. There is a notable increase in respondents reporting negative experiences with Foodstuffs North Island.



Thinking about the past year, how would you rate… The ease of dealing with [INSERT RGR]

Base: *All suppliers with a relationship with each RGR in each year – base sizes in chart.*

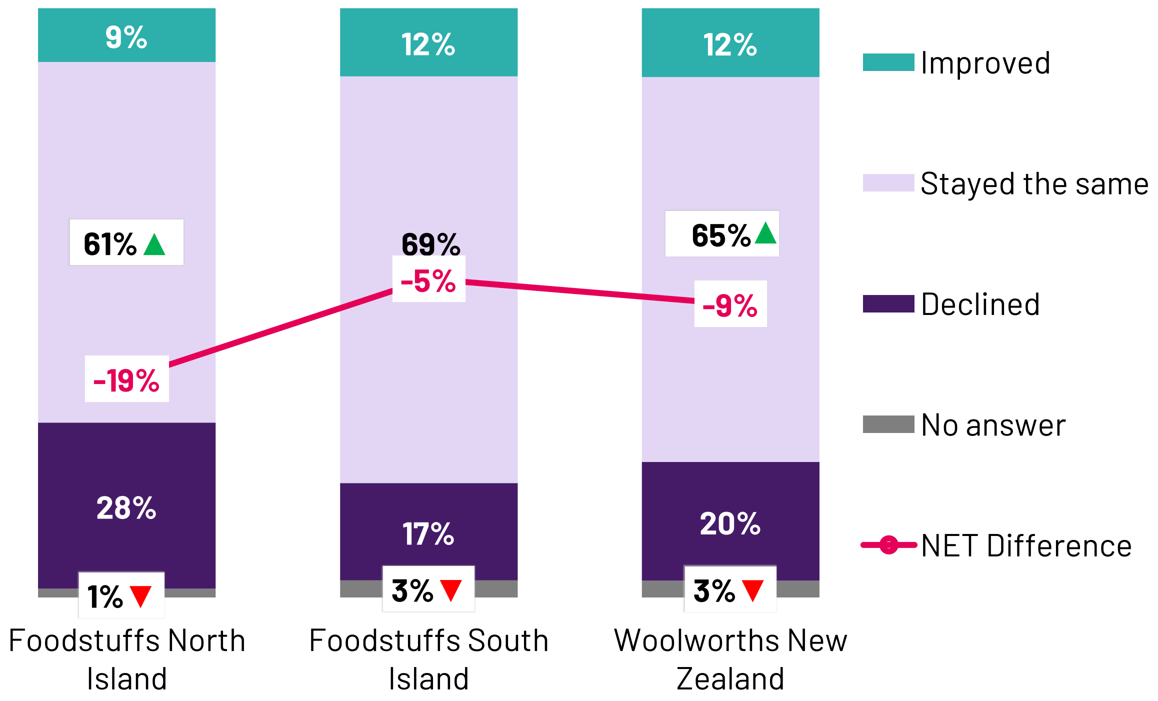
Stated change vs observed trends in ease of dealing

Around two thirds of survey respondents indicate that the ease of dealing with the RGRs has stayed the same. However, more relationships have declined than improved.

Ratings for ease of dealing with Woolworths & Foodstuffs North Island are lower in 2026, with no change to Foodstuffs South Island.

▲/▼ is statistically significantly higher/lower than the total sample

Change in ease of dealing with...



NET difference in ease of dealing with RGRs – by year	2024	2026	Change from 2024
Foodstuffs North Island	-5%	-10%	▼ -5
Foodstuffs South Island	19%	19%	=
Woolworths New Zealand	21%	7%▼	▼ -14

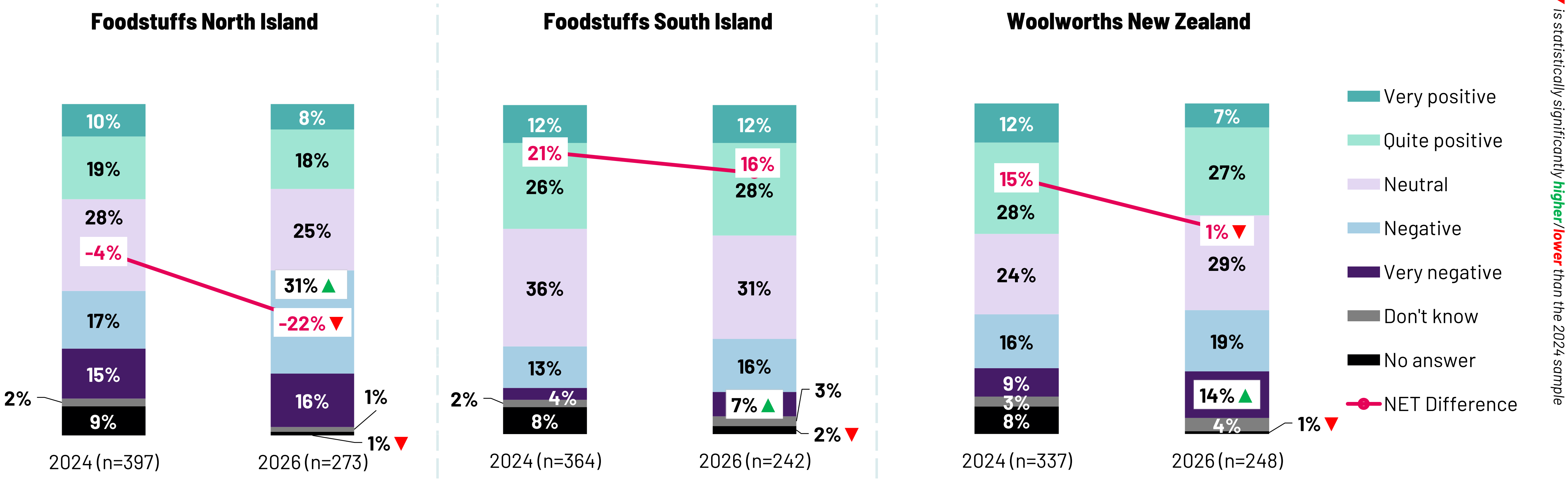
▲/▼ is statistically significantly higher/lower than the 2024 sample

How have the following aspects changed over the past year? The ease of dealing with [RGR] / Thinking about the past year, how would you rate...The ease of dealing with [RGR]

***Base:** All suppliers with a relationship with – Foodstuffs North Island (n=273), Foodstuffs South Island (n=242), Woolworths New Zealand (n=248)*

Fairness trends

Stated fairness of dealing with each RGR has gone down, with significant increases in 'very negative' ratings for Foodstuffs South Island and Woolworths New Zealand.



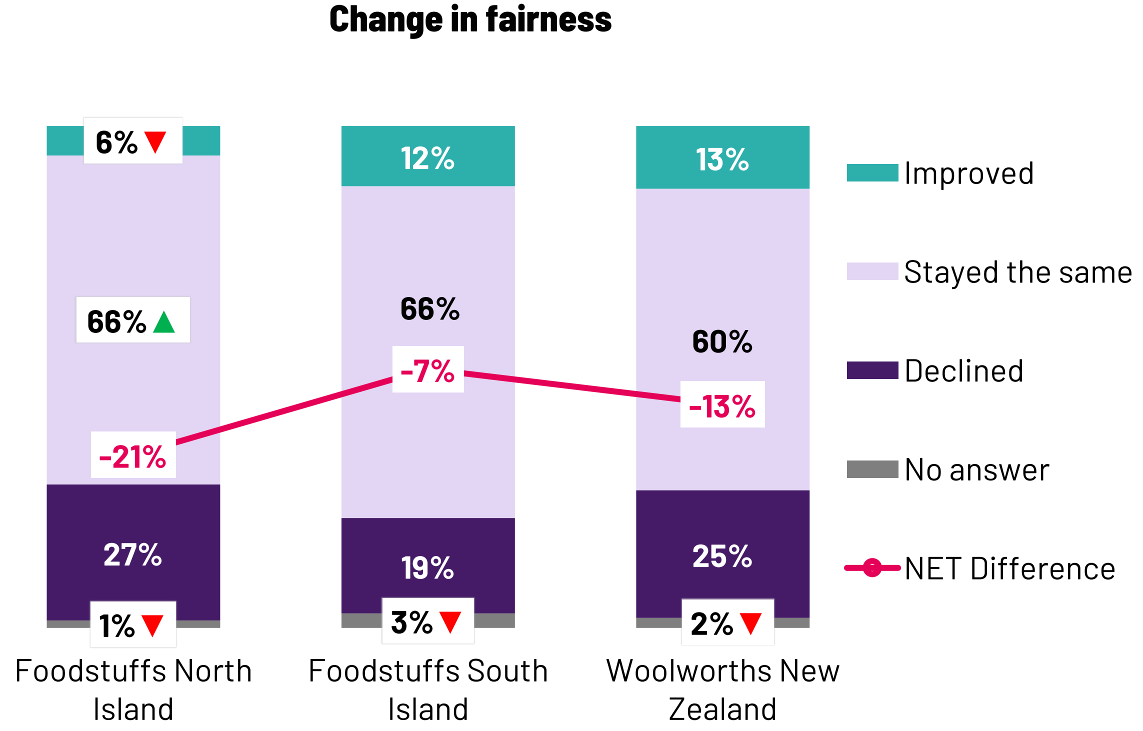
Thinking about the past year, how would you rate… The fairness of dealing with [INSERT RGR]

***Base:** All suppliers with a relationship with each RGR in each year – base sizes in chart.*

Stated change vs observed fairness trends

Respondents are more likely than in 2024 to indicate that their relationship with Foodstuffs North Island has stayed the same. More indicate a decline in fairness than an improvement, which corresponds with lower fairness being reported overall in 2026.

▲/▼ is statistically significantly higher/lower than the total sample



NET difference in fairness of dealing with RGRs – by year	2024	2026	Change from 2024
Foodstuffs North Island	-4%	-22%▼	▼ -18
Foodstuffs South Island	21%	16%	▼ -5
Woolworths New Zealand	15%	1%▼	▼ -14

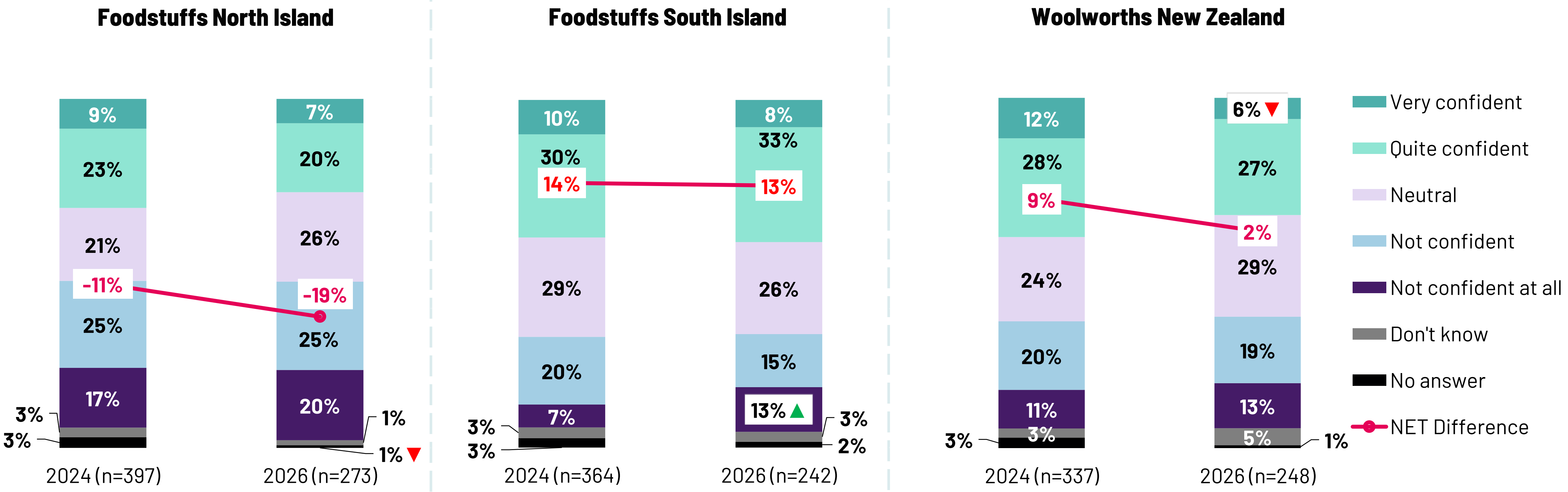
▲/▼ is statistically significantly higher/lower than the 2024 sample

How have the following aspects changed over the past year? The fairness of dealing with [RGR] / Thinking about the past year, how would you rate… The fairness of dealing with [RGR]

***Base:** All suppliers with a relationship with – Foodstuffs North Island (n=273), Foodstuffs South Island (n=242), Woolworths New Zealand (n=248)*

Confidence in negotiation trends

Confidence in negotiation is down slightly for all RGRs, with a significant increase in those 'not at all confident' with Foodstuffs South Island & a significant decrease in respondents who are 'very confident' with Woolworths New Zealand.



▲/▼ is statistically significantly *higher*/*lower* than the 2024 sample

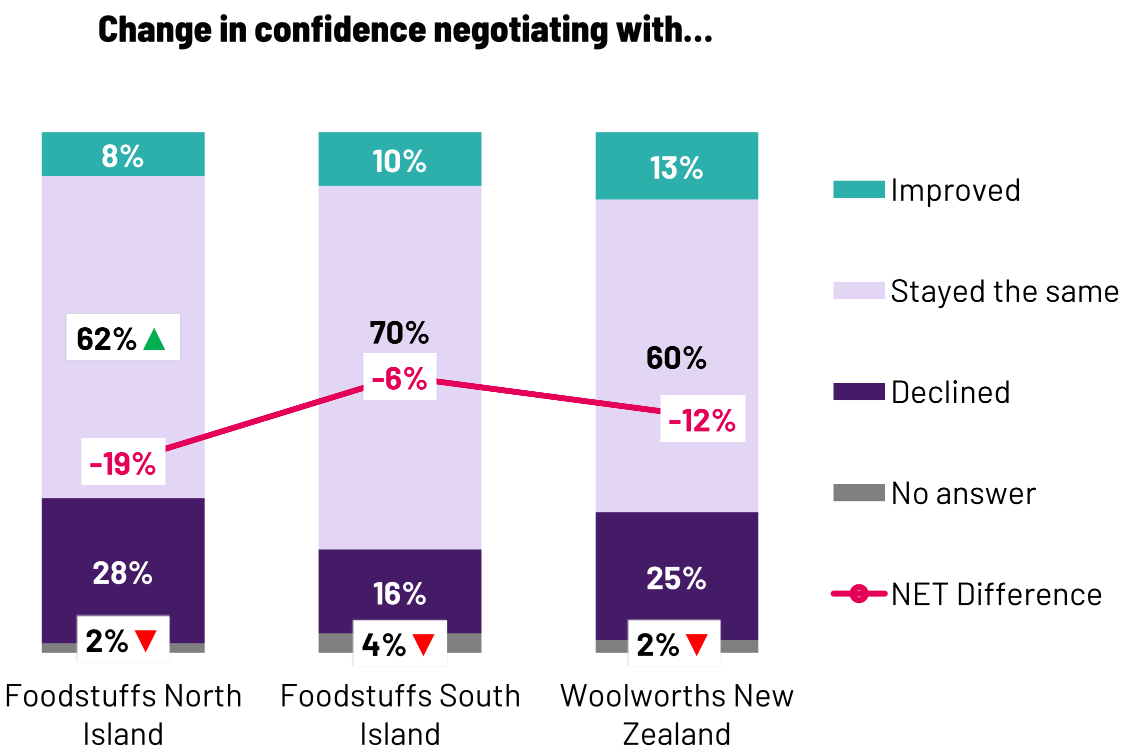
How would you rate your level of confidence negotiating with [INSERT RGR]

Base: *All suppliers with a relationship with each RGR in each year – base sizes in chart.*

Stated change vs observed confidence trends

On balance, most respondents indicate lower confidence in negotiating with each RGR than they did in 2024. For each RGR, there are more suppliers reporting declining rather than improving confidence.

▲/▼ is statistically significantly *higher*/*lower* than the total sample



NET difference in confidence negotiating with RGRs – by year	2024	2026	Change from 2024
Foodstuffs North Island	-11%	-19%	▼ -8
Foodstuffs South Island	14%	13%	▼ -1
Woolworths New Zealand	9%	2%	▼ -7

How have the following aspects changed over the past year? Your confidence negotiating with [RGR] / How would you rate your level of confidence negotiating with [INSERT RGR]

***Base:** All suppliers with a relationship with – Foodstuffs North Island (n=273), Foodstuffs South Island (n=242), Woolworths New Zealand (n=248)*

Experience/ease of dealing/fairness

There is little variance in reported experience, ease of dealing with, or fairness of dealing with each RGR according to business size.

There are some exceptions in overall experience: More than half of respondents from smaller businesses are positive about their overall experience with Foodstuffs South Island, a significant improvement on 2024, whilst overall experience of medium-sized suppliers with Woolworths has dropped significantly this year, to a much lower level than for other businesses.

Foodstuffs North Island

% positive about ...	<20 (n=132)	20-99 (n=87*)	≥100 (n=36**)
overall experience	30%	29%	28%
ease of dealing with...	32%	31%	31%
fairness of dealing with...	28%	22%	25%

Foodstuffs South Island

% positive about...	<20 (n=108)	20-99 (n=82*)	≥100 (n=32**)
overall experience	51% ▲	46%	44%
ease of dealing with...	47%	43%	34%
fairness of dealing with...	45%	40%	31%

Woolworths New Zealand

% positive about	<20 (n=112)	20-99 (n=80*)	≥100 (n=33**)
overall experience	38%	28% ▼	48%
ease of dealing with...	39%	38%	39%
fairness of dealing with...	36%	30%	36%

▲/▼ *is statistically significantly **higher**/**lower** than the 2024 sample*

Thinking about the past year, how would you rate...The ease of dealing with [INSERT RGR] / The ease of dealing with [INSERT RGR]/ The fairness of dealing with [INSERT RGR]/ How many full-time employees, including yourself, does the company have?

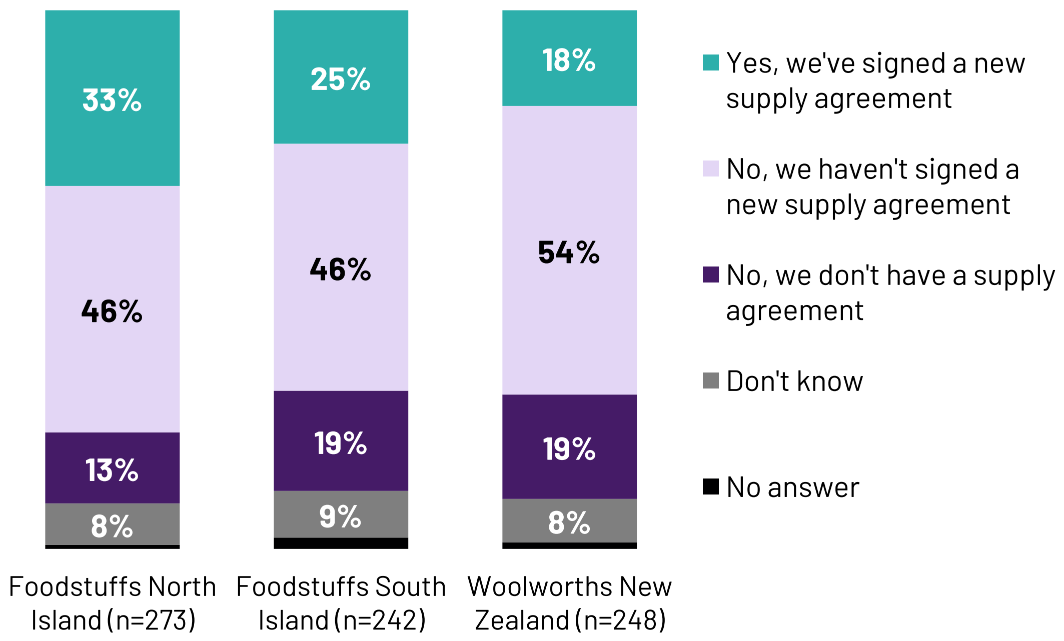
***Base:** All suppliers of each size with a relationship with each RGR in 2026 – base sizes in table. ***CAUTION:** Low base (50≤ n <100). ****CAUTION:** Very low base, indicative results only (n<50).*

New supply agreements

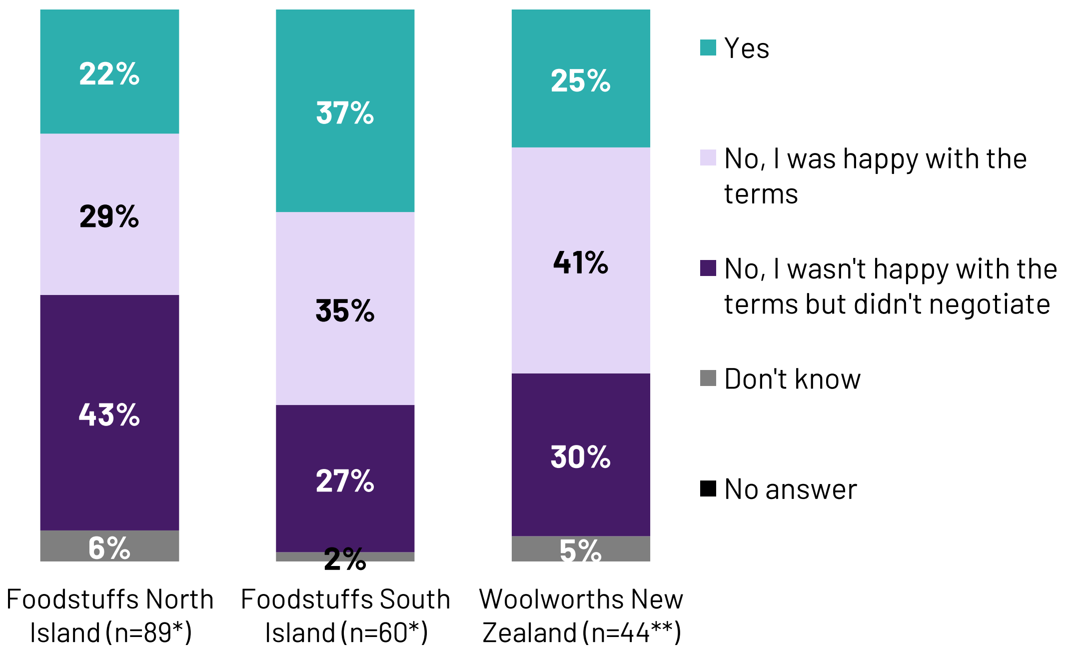
A minority of survey respondents report signing new agreements in the past year with an RGR they work with. This is more common among those working with Foodstuffs North Island, a third of whom signed a new agreement.

Of those signing a new agreement, only a minority negotiated terms. Even if they state they're unhappy with those terms, less than 2 in 5 negotiated with any RGR.

Signed a new supply agreement with...



Negotiated terms with...



Have you signed a new supply agreement with [INSERT RGR] in the past 12 months? / Did you negotiate any of the terms in your new supply agreement with [INSERT RGR]?

***Base:** All suppliers with a relationship with each RGR in 2026 / All who signed a new agreement with each RGR – bases sizes in chart. ***CAUTION:** Low base (50≤ n <100). ****CAUTION:** Very low base, indicative results only (n<50).*

ISSUES FACED

04

Key findings: Issues faced

The proportion of respondents that reported facing issues has increased significantly since 2024.

However, there was minimal change to both the category and nature of the issues faced.

An exception is a significantly larger proportion of respondents reported difficulty obtaining data and insights from RGRs.

Respondents experiencing issues with Foodstuffs North Island were significantly less likely to have sought resolution in 2026 than they were in 2024, with no change in this behaviour for those supplying other RGRs.

There has been no significant change in respondents' satisfaction with the outcome of that resolution process.

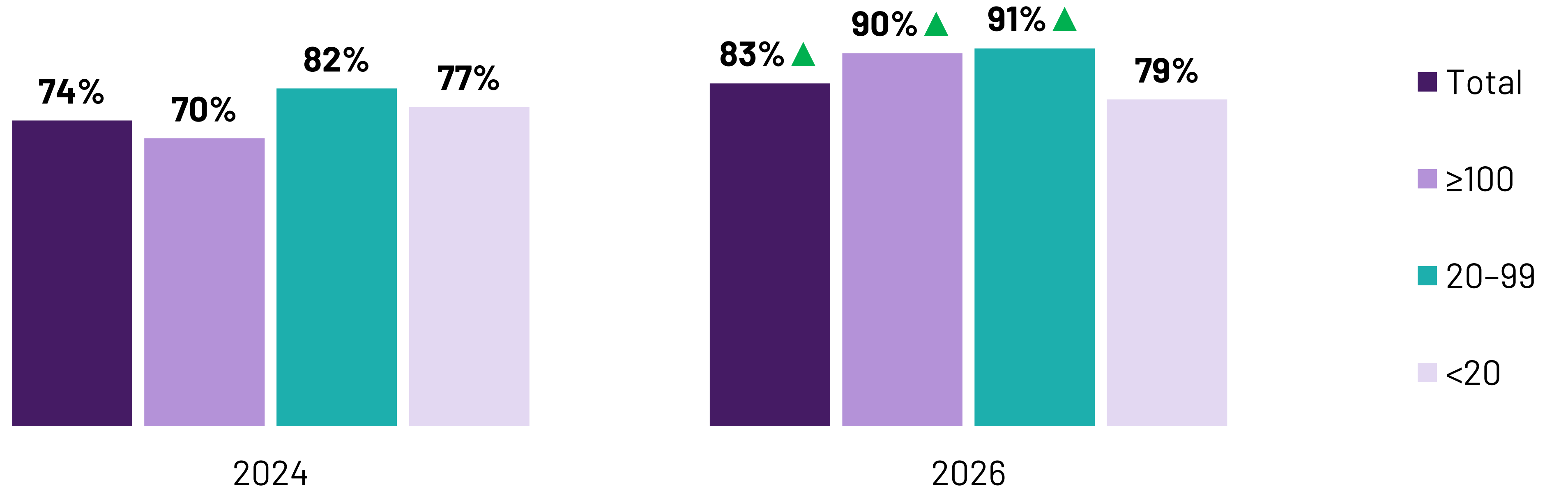
	2024	2026
Facing issues	74%	83% ▲
Pricing issues	49%	52%
Delisting/category review	43%	50%
Obtaining access to data insights	22%	29% ▲
Promotion issues	26%	26%
Distribution issues	19%	21%
Agreement issues	16%	14%

▲/▼ *is statistically significantly* ***higher/lower*** *than the 2024 sample*

Issues experienced trends

The majority of respondents reported experiencing issues in the past year and this figure has increased significantly since 2024. This significant increase in issues experienced has largely been reported by respondents from large and medium-sized suppliers.

Faced an issue with a grocery retailer – by business size (FTEs)



▲/▼ is statistically significantly **higher**/**lower** than the 2024 sample

I Thinking about the past year, have you faced any of the issues related to the following? / How many full-time employees, including yourself, does the company have?

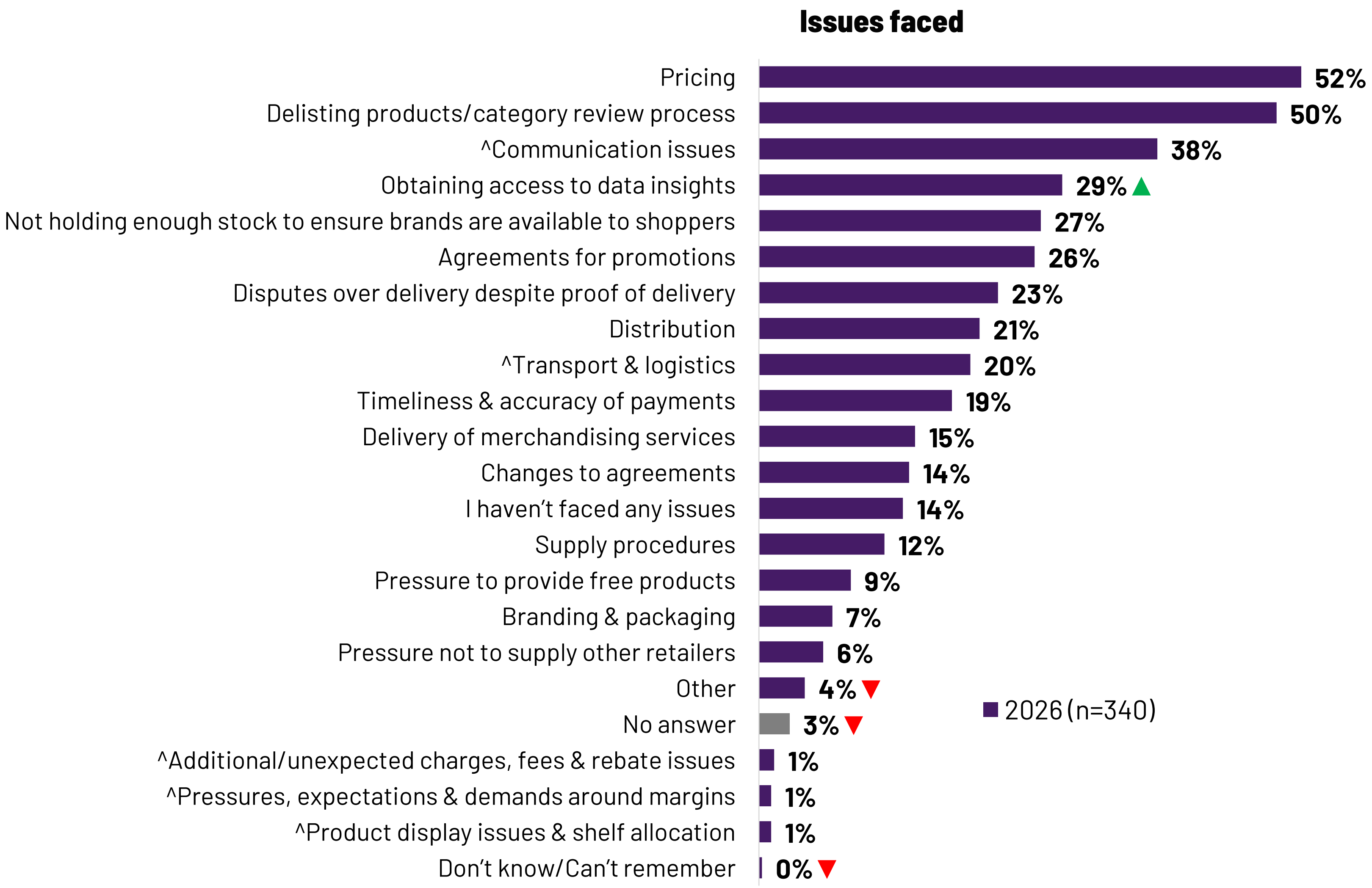
Base: *Total sample (split by business size) –* ***2024:*** *Total (n=500), ≥100 (n=66*), 20-99 (n=137), <20 (n=260);* ***2026:*** *Total (n=340), ≥100 (n=41**), 20-99 (n=93*), <20 (n=177).* ****CAUTION:*** *Low base (50≤ n <100).* *****CAUTION:*** *Very low base, indicative results only (n<50).*

Issues experienced

Pricing and delisting are the top issues reported by survey respondents.

Since 2024, there has been a 7 percentage point increase in respondents' reporting of issues related to obtaining access to data insights, rising from 22% to 29%.

Communication & pricing issues were also commonly cited as a reason for negative experiences with RGRs.



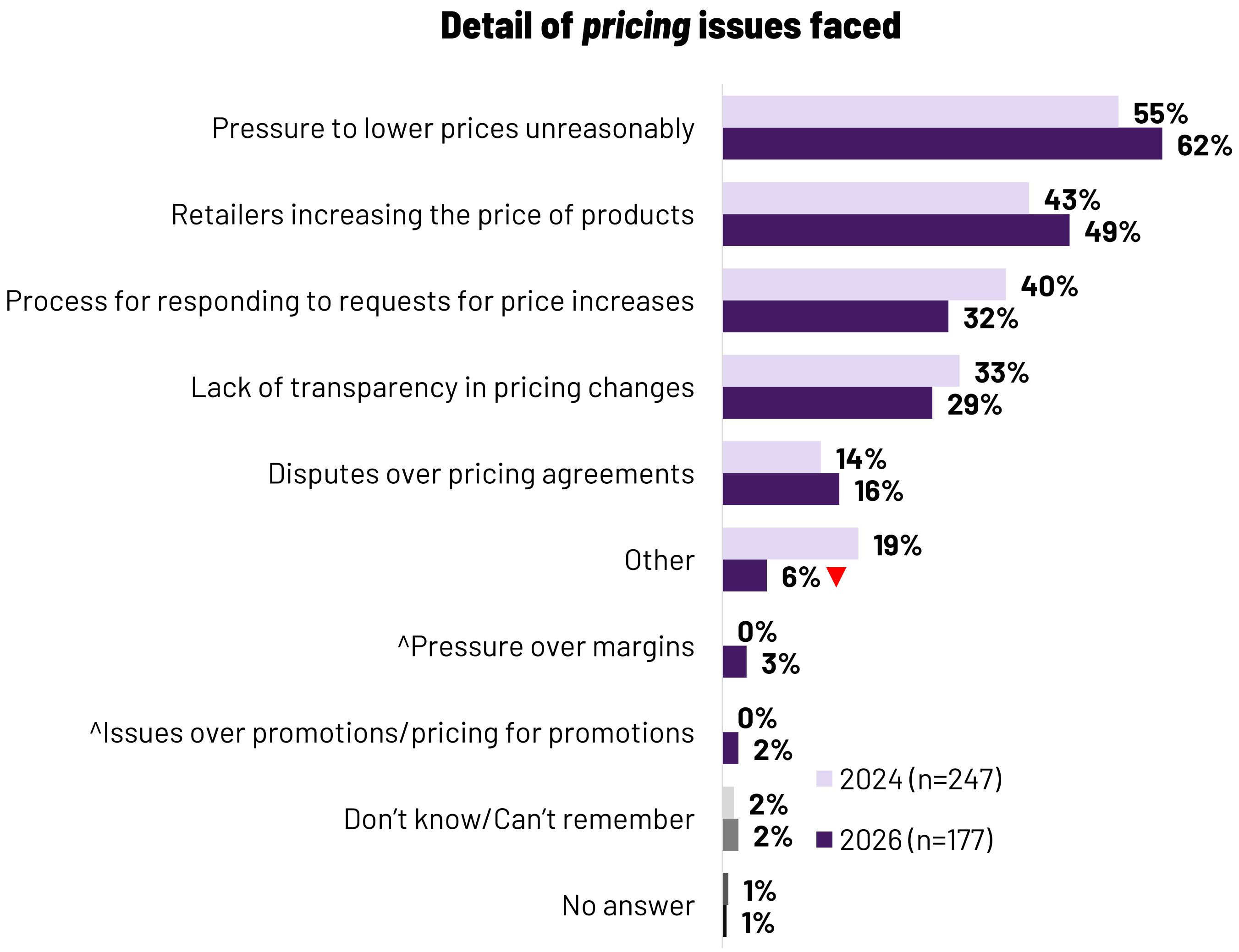
▲/▼ is statistically significantly **higher**/**lower** than the 2024 sample

Thinking about the past year, have you faced any of the issues related to the following?

Base: *Total sample – base size in chart.* ***^Note:*** *New response options in 2026.*

Pricing issues

The main types of pricing issues encountered by survey respondents continue to involve pressure to lower prices unreasonably and retailers increasing the price of products.



▲/▼ is statistically significantly higher/lower than the 2024 sample

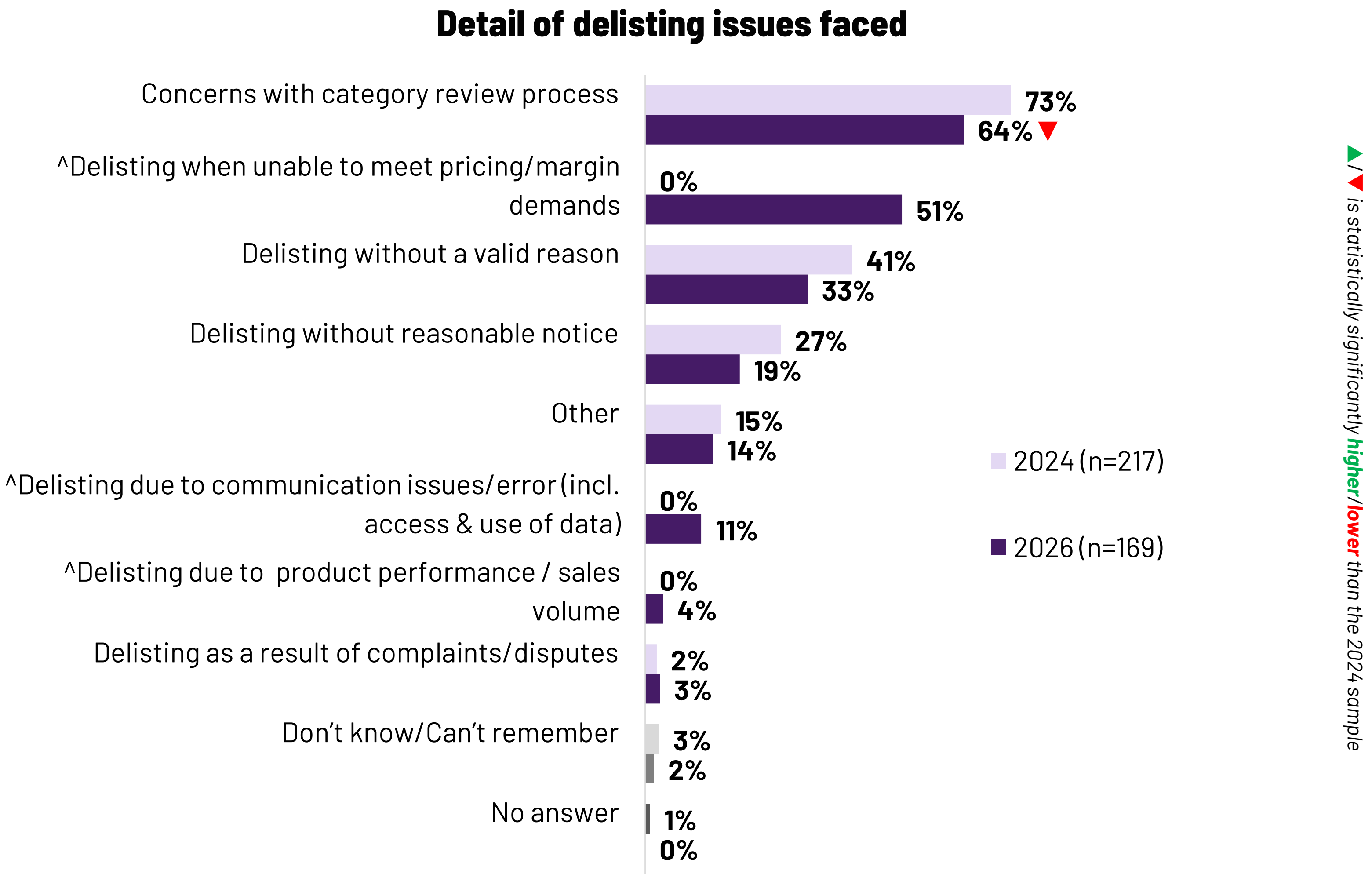
You mentioned you faced an issue with pricing, what was this issue to do with?

Base: *Those who faced pricing issues – base sizes in chart.* ***^Note:*** *New response options in 2026.*

Delisting issues

The main issue suppliers have with delisting is around the category review process, although less so compared to 2024.

Half also cite concerns with delisting when unable to meet pricing or margin demands.



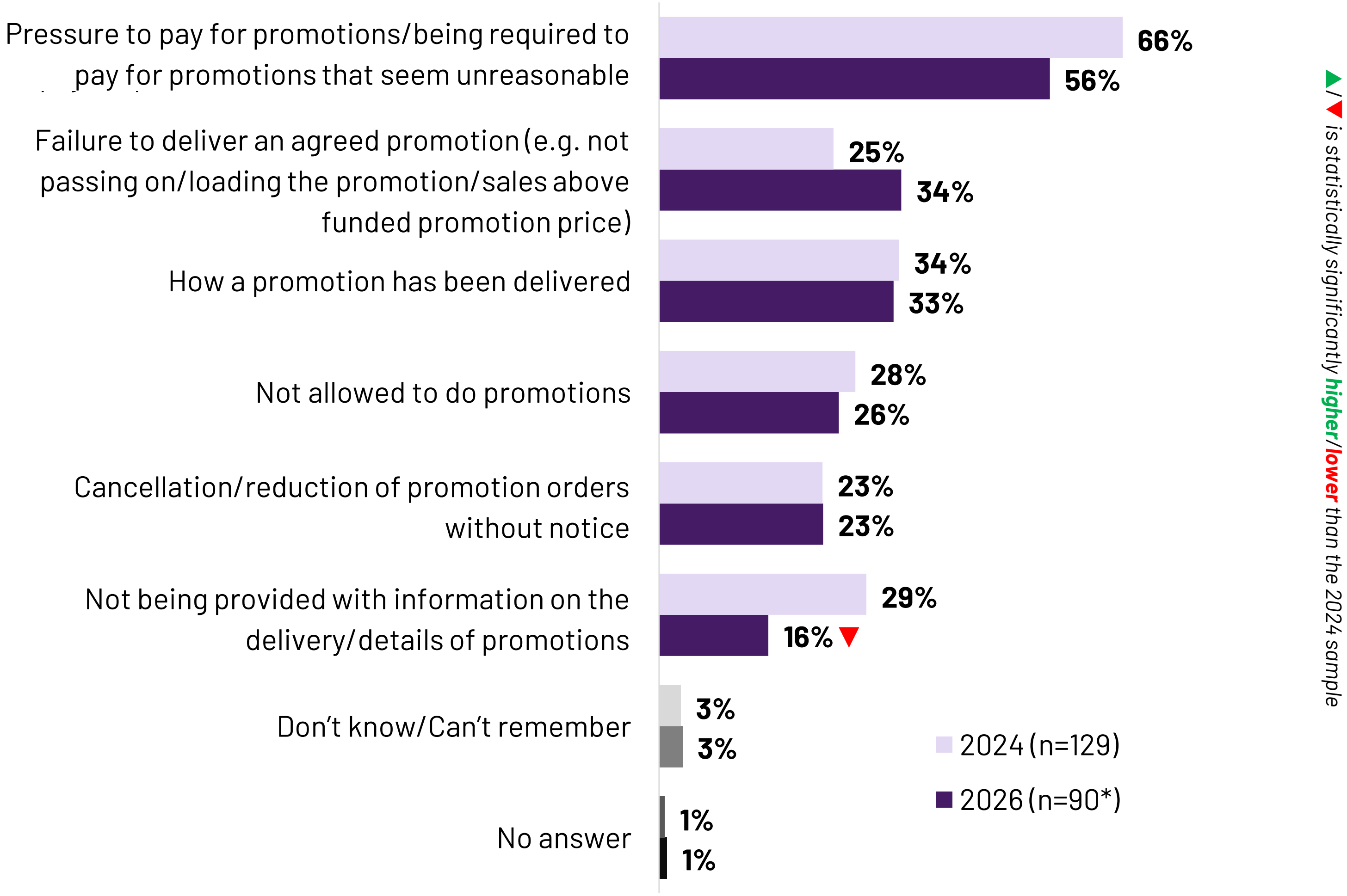
You mentioned you faced an issue with delisting/category reviews, what was this issue to do with?

Base: *Those who faced delisting issues – base sizes in chart.* ***^Note:*** *New response options in 2026.*

Promotions issues

When it comes to promotions, the main issue faced is pressure to pay for promotions/being required to pay for promotions that seem unreasonable.

Detail of promotions issues faced



You mentioned you faced an issue with promotions, what was this issue to do with?

Base: *Those who faced promotion issues – base sizes in chart.* ****CAUTION:*** *Low base (50≤ n <100).*

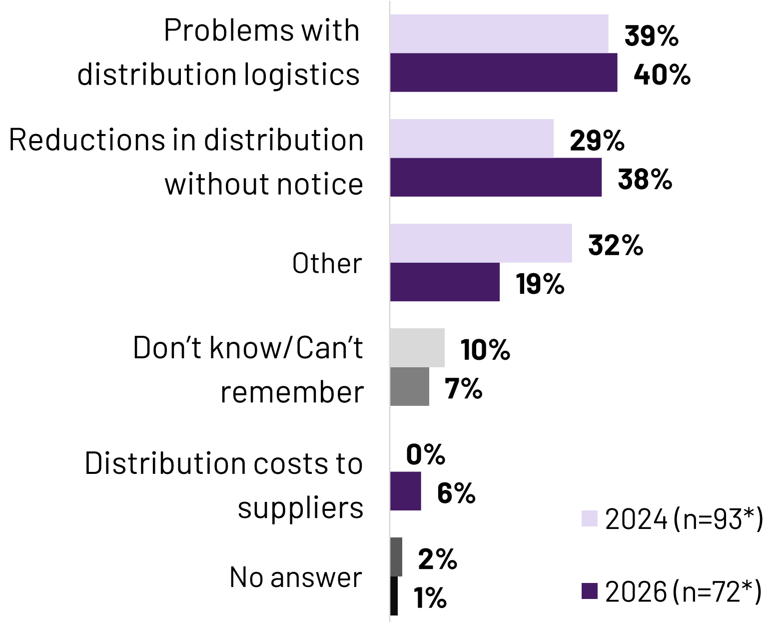
Distribution, supply & agreement issues

Similarly to 2024, those who have faced distribution issues primarily encounter problems with distribution logistics and reductions without notice.

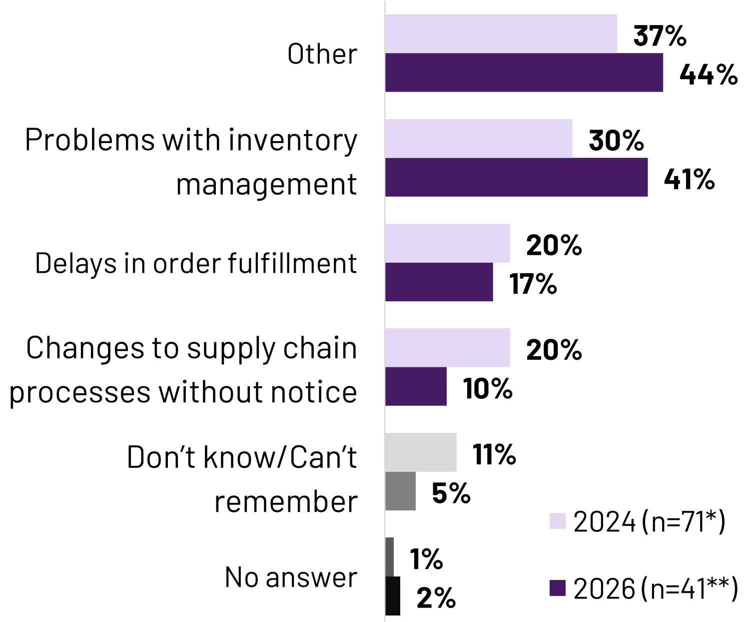
Similarly to 2024, supply procedure issues are largely specific to the context of suppliers or related to problems with inventory management.

Agreements issues tend to mainly involve changes to agreements after being agreed upon or other issues specific to the respondent's business and their agreements.

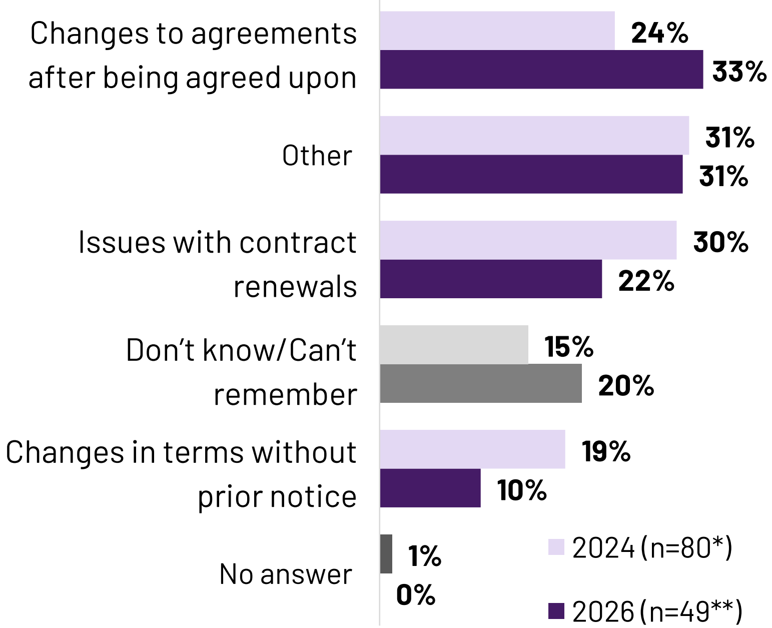
Detail of distribution issues faced



Detail of supply issues faced



Detail of agreement issues faced



You mentioned you faced an issue with distribution, what was this issue to do with? / You mentioned you faced an issue with changes to agreements, what was this issue to do with? / You mentioned you faced an issue with supply procedures, what was this issue to do with?

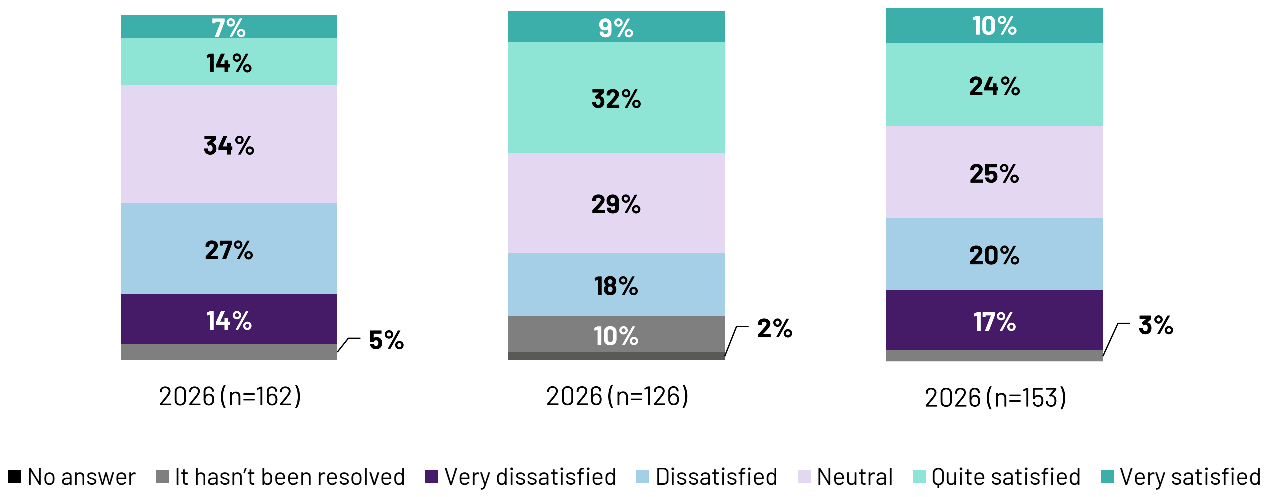
***Base:** Those who faced distribution / agreement / supply issues – base sizes in chart. **^Note:** New response option in 2026. ***CAUTION:** Low base (50≤ n <100). ****CAUTION:** Very low base, indicative results only (n<50).*

Issue resolution

More than half have tried to resolve their issue with an RGR, although since 2024 there has been a decrease in resolution attempts with Foodstuffs North Island. Satisfaction with the response from the retailers remains similar to 2024.

Tried to resolve an issue (out of those who have faced an issue)

Satisfied with response/action from...



▲/▼ is statistically significantly *higher*/*lower* than the 2024 sample

Have you ever tried to resolve an issue with [INSERT RGR]? / How satisfied were you with the response/action to issues raised with [INSERT RGR]?

Base: *Those who had an issue and currently supply –* ***2024:*** *Foodstuffs North Island (n=311), Foodstuffs South Island (n=289), Woolworths New Zealand (n=270);* ***2026:*** *Foodstuffs North Island (n=236), Foodstuffs South Island (n=216), Woolworths New Zealand (n=225) / Those who have tried to resolve an issue with an RGR – base sizes in chart.*

CODE AWARENESS

05

Key findings:
The Grocery Supply Code

Awareness of the Grocery Supply Code has grown since 2024. The proportion who have 'at least heard' of it was already high but saw significant growth, with all mid-sized suppliers reporting they are aware.

However, familiarity has not strengthened significantly.

Fewer respondents reported having sought information about the Grocery Supply Code on the Commerce Commission website.

Whilst this is only one source of information, this lower engagement may have limited the growth in **familiarity**, even as awareness grew.

Awareness of the Anonymous Reporting Tool and Dispute Resolution Scheme also appears higher in 2026, but with little increase in familiarity.

This sort of growth indicates that survey respondents are starting to hear more about the tools that the Commerce Commission provides, but engagement with those tools might pick up more slowly over time, as more suppliers find that they need to use them or understand them better.

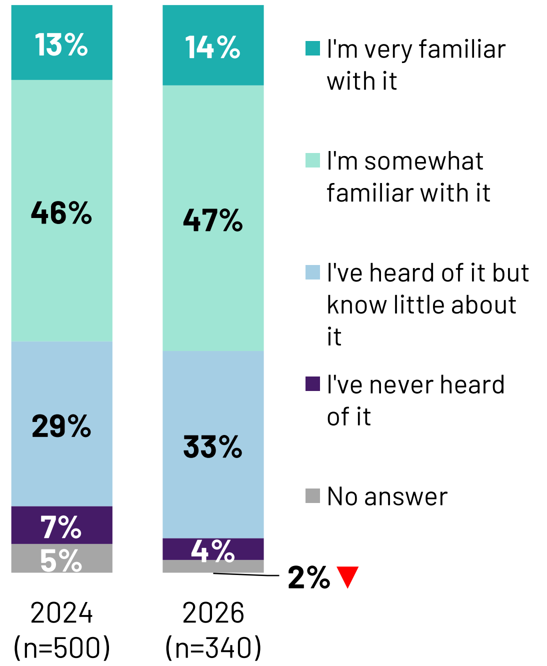
	2024	2026
Grocery Supply Code	88% At least heard of	94% At least heard of
Information on website	33% Searched	28% Searched
Anonymous Reporting Tool	50% Familiar with	61% Familiar with
Dispute Resolution Scheme	50% Familiar with	55% Familiar with

Code familiarity

Whilst there has been no significant change in the proportion of respondents reporting being highly familiar with the Grocery Supply Code, the proportion who at least know a little about it has significantly increased.

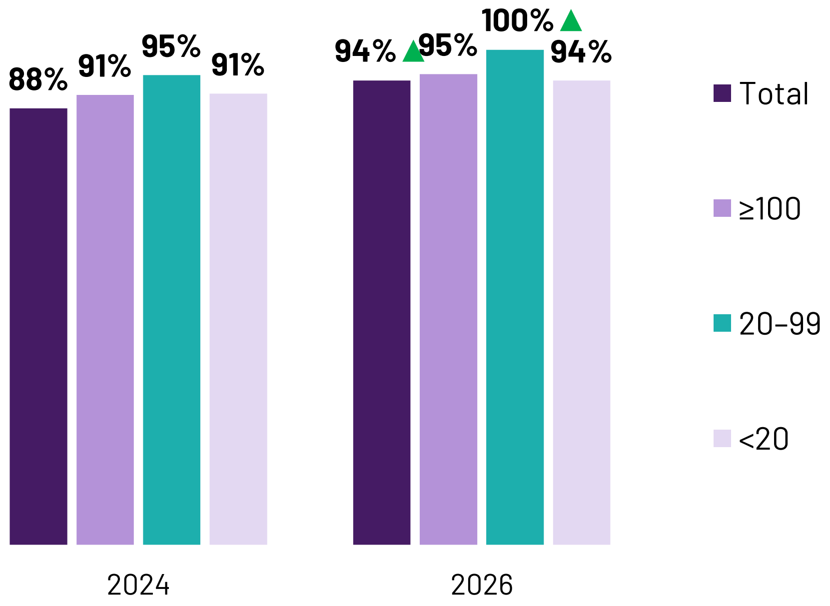
Awareness of both the Code and its review is significantly higher among those from larger businesses.

Familiarity with the Grocery Supply Code

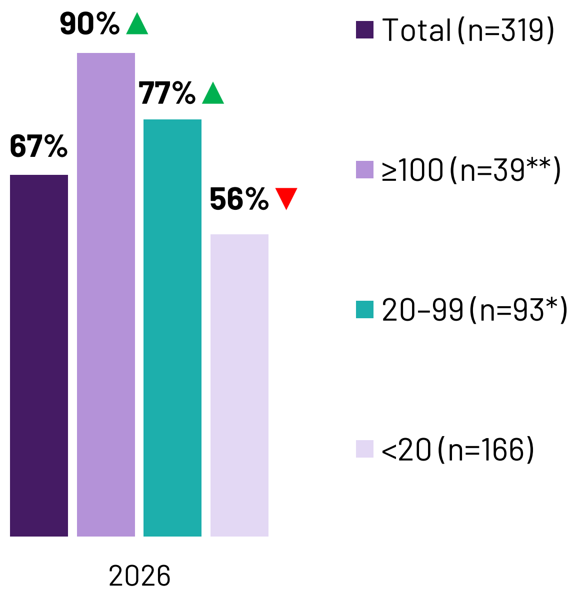


Suppliers that have *faced an issue* are significantly **more likely to be very/somewhat familiar** with the Grocery Supply Code (**64%** vs 59% combined 2024 and 2026 sample)

Awareness (at least know a little) – by business size (FTEs)



Code review awareness (% aware)



▲/▼ is statistically significantly *higher/lower* than the 2024 sample

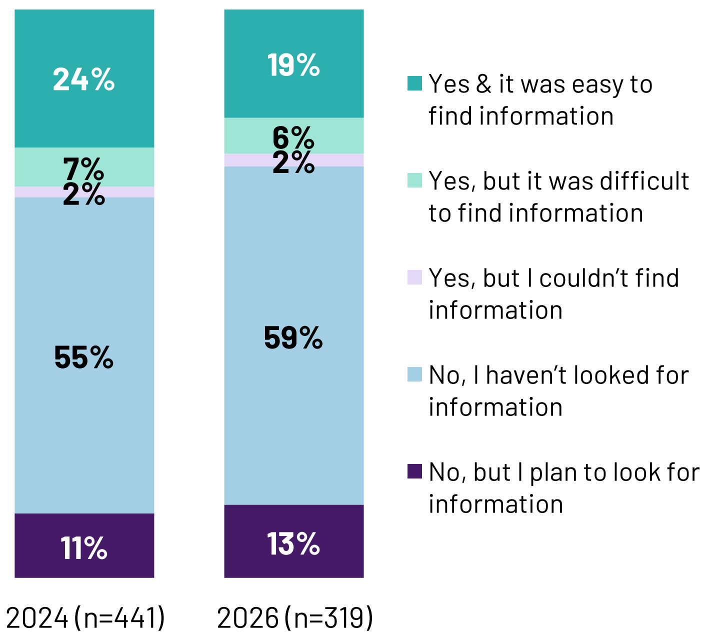
How familiar are you with the Grocery Supply Code? / Are you aware that the Grocery Supply Code has been recently reviewed? / How many full-time employees, including yourself, does the company have?

***Base:** Total sample (split by business size) – **2024:** Total (n=500), ≥100 (n=66*), 20-99 (n=137), <20 (n=260); **2026:** Total (n=340), ≥100 (n=41**), 20-99 (n=93*), <20 (n=177) / Familiarity with/awareness of Grocery Supply Code – base sizes in chart. ***CAUTION:** Low base (50≤ n <100). ****CAUTION:** Very low base, indicative results only (n<50).*

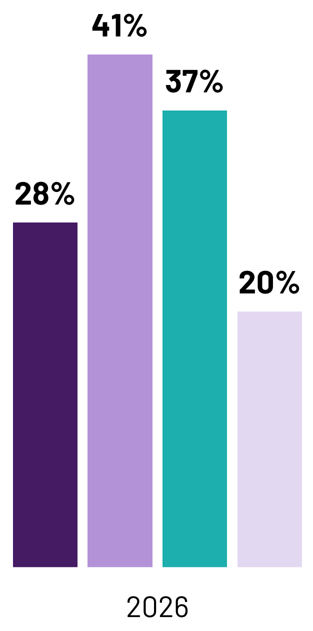
Commerce Commission website info

Fewer survey respondents report looking for information on the Commerce Commission site in 2026. Smaller businesses are less likely to seek information through the site & to state that information was easy to find. The majority of those finding information state that it was 'at least' useful, but 4-in-10 still have questions after finding it.

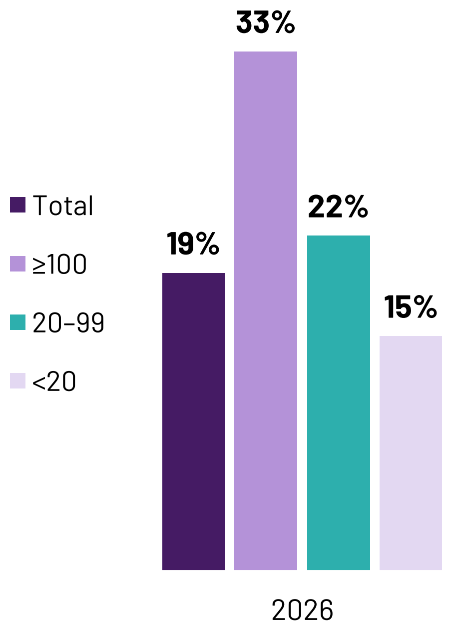
Searched for information on the Grocery Supply Code



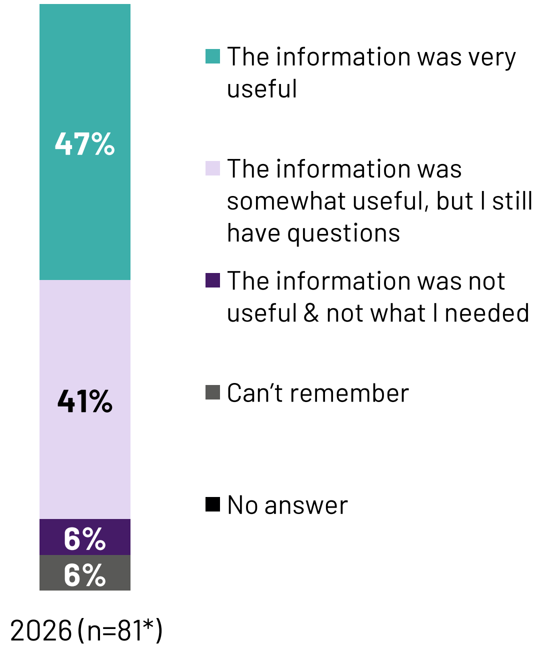
% Tried to find information – by business size (FTEs)



% Found it easy to find information – by business size (FTEs)



Usefulness of the information on the Grocery Supply Code



Have you tried to find information or guidance on the Grocery Supply Code on the Commerce Commission website? / How many full-time employees, including yourself, does the company have? / How useful was the Commerce Commission's information or guidance on the Grocery Supply Code?

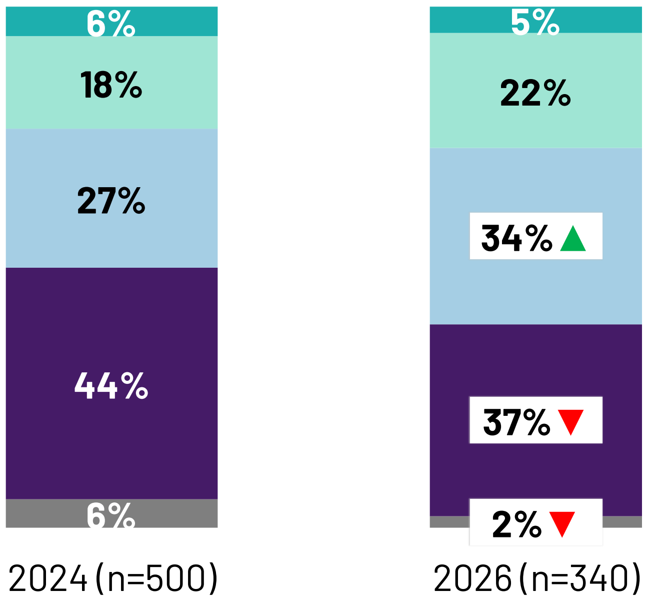
***Base:** Suppliers aware of Grocery Supply Code (split by business size) – **2026:** Total (n=319), ≥100 (n=39**), 20-99 (n=93*), <20 (n=166) / Suppliers who are aware of the Grocery Supply Code and have tried to find information on it – base size in chart. ***CAUTION:** Low base (50≤ n <100). ****CAUTION:** Very low base, indicative results only (n<50).*

Reporting tool and resolution scheme familiarity (i)

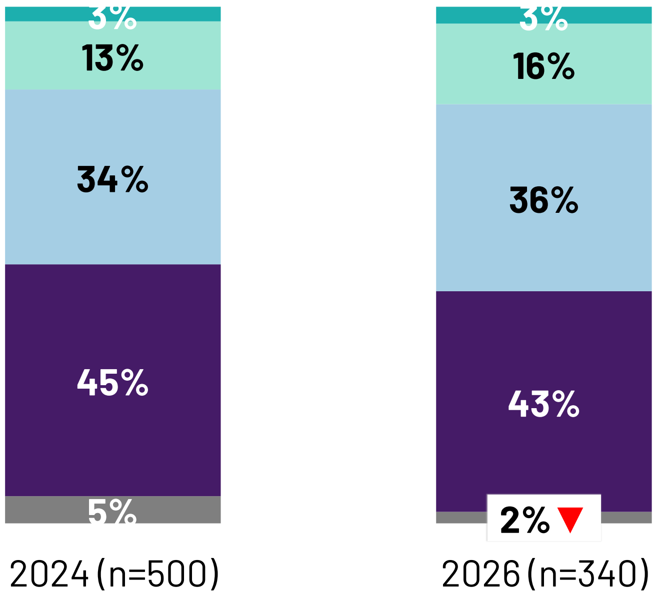
There has been a significant increase for respondents reporting at least some awareness of the Anonymous Reporting Tool, while familiarity is growing more steadily.

Familiarity with the Dispute Resolution Scheme has not increased to any statistically significant extent.

Familiarity with Anonymous Reporting Tool



Familiarity with Grocery Industry Dispute Resolution Scheme



No answer | I've never heard of it | I've heard of it but know little about it | I'm somewhat familiar with it | I'm very familiar with it

▲/▼ is statistically significantly higher/lower than the 2024 sample

How familiar are you with the Commerce Commission's Anonymous Reporting Tool for anonymously reporting issues to the Commerce Commission for possible investigation? / How familiar are you with the established Grocery Industry Dispute Resolution Scheme?

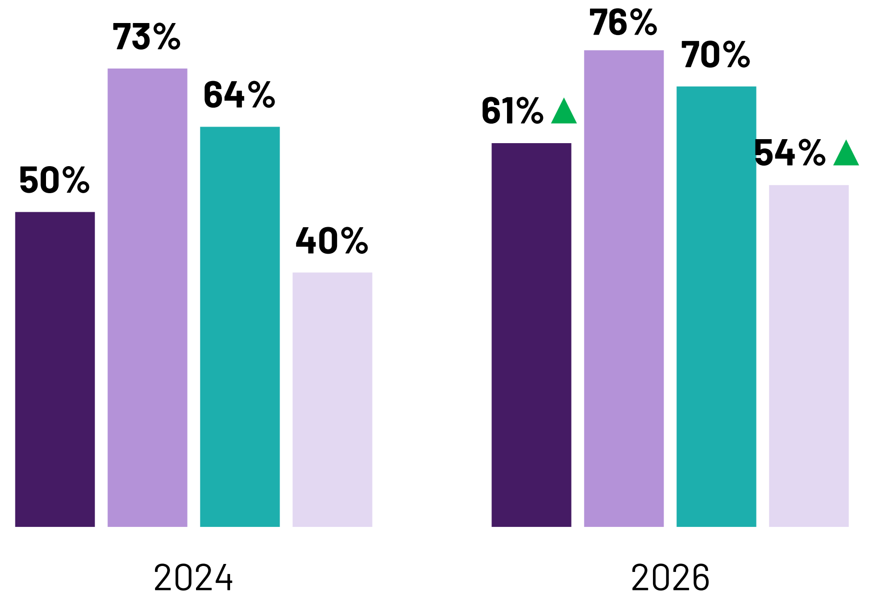
***Base:** Total sample – base sizes in chart.*

Reporting tool & resolution scheme familiarity (ii)

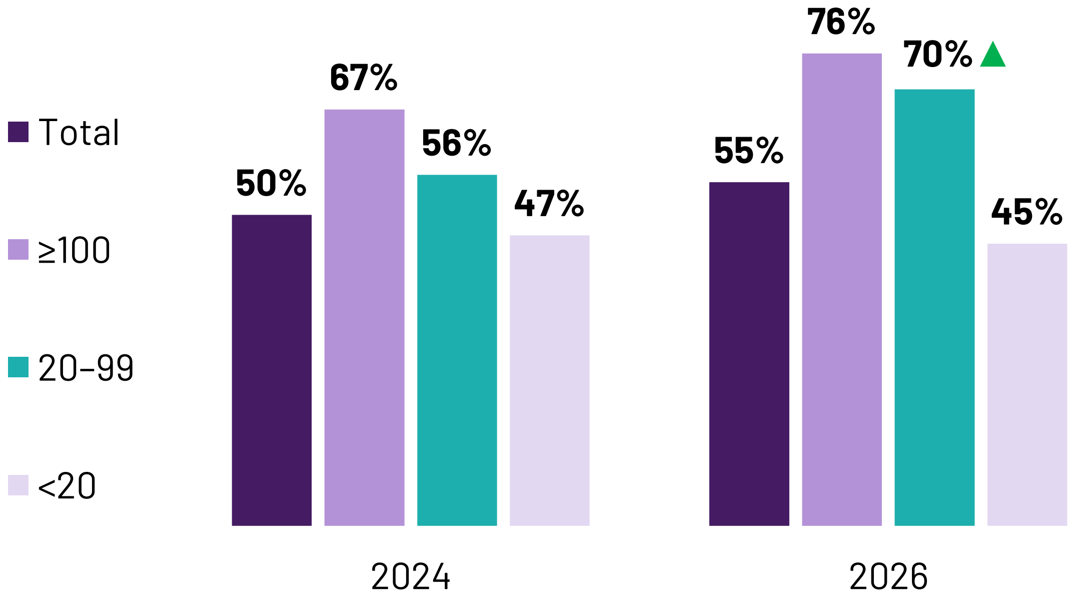
The rise in familiarity with the Anonymous Reporting Tool is largely driven by respondents from smaller businesses.

The Dispute Resolution Scheme familiarity has grown the most among larger suppliers, with no significant change among respondents from smaller businesses.

Familiarity with Anonymous Reporting Tool – by business size (FTEs)



Familiarity with Grocery Industry Dispute Resolution Scheme – by business size (FTEs)



▲/▼ is statistically significantly *higher*/*lower* than the 2024 sample

How familiar are you with the Commerce Commission's Anonymous Reporting Tool for anonymously reporting issues to the Commerce Commission for possible investigation? / How familiar are you with the established Grocery Industry Dispute Resolution Scheme? / How many full-time employees, including yourself, does the company have?

***Base:** Total sample (split by business size) – **2024:** Total (n=500), ≥100 (n=66*), 20-99 (n=137), <20 (n=260); **2026:** Total (n=340), ≥100 (n=41**), 20-99 (n=93*), <20 (n=177). ***CAUTION:** Low base (50≤ n <100). ****CAUTION:** Very low base, indicative results only (n<50).*

REBATES, DISCOUNTS & PAYMENTS

06

Key findings:
Rebates, discounts and payments

Rebates, discounts, and payments are significantly more common in 2026 than 2024.

These agreements are typically *RGR-initiated* amongst suppliers of all types, and most respondents say they are motivated to agree with these terms *to meet RGR requirements*.

Survey respondents of all types are more likely to report that the terms with RGRs are 'worse for the supplier than those with other customers' compared to 2024."

	2024	2026
Rebates, discounts & payments	**74%** Agreed to RDPs	**86%** Agreed to RDPs
Who initiates RDPs	**61%** RGR initiated	**68%** RGR initiated
Supply agreement terms with RGRs are...	**-** Worse compared to other customers	**59%** Worse compared to other customers

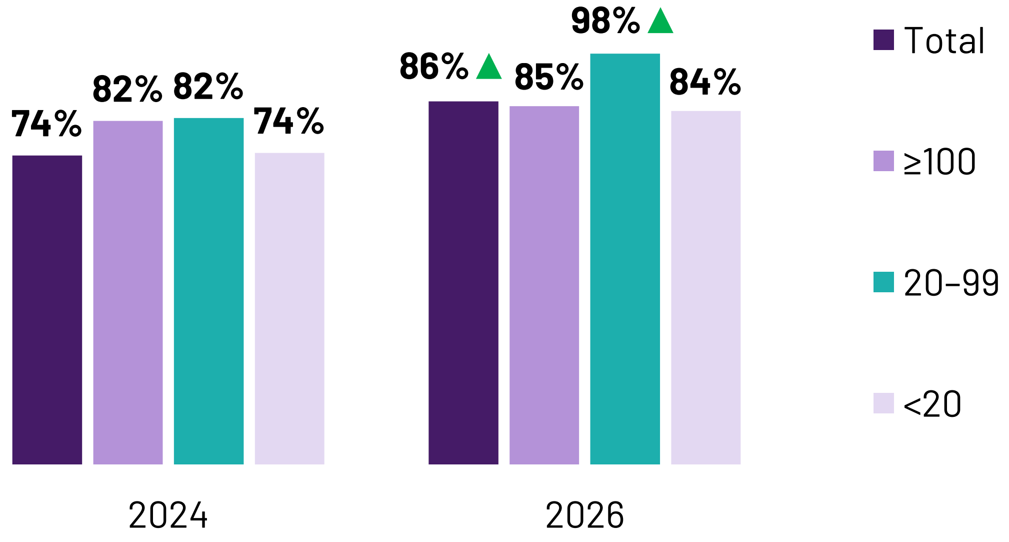
Rebates, discounts and payments

There has been an increase in respondents' reporting of rebates, discounts and payments, significantly so for the total sample and mid-sized businesses.

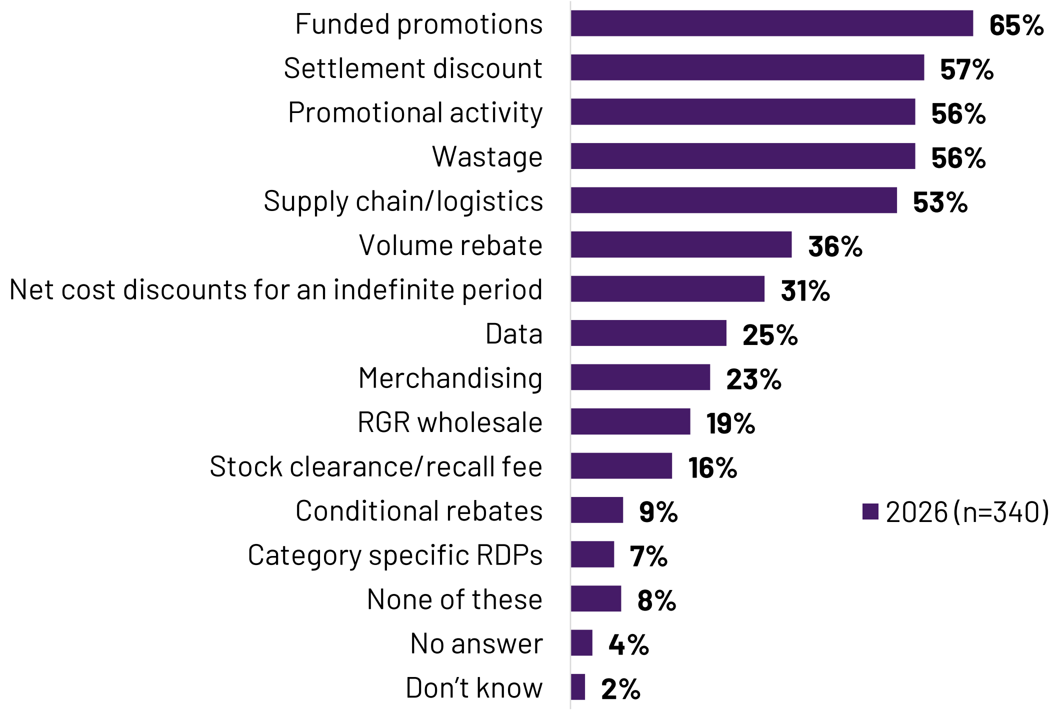
More than half of suppliers reported agreeing to 5 types of rebates, discounts and payments.

▲/▼ is statistically significantly *higher*/*lower* than the 2024 sample

Rebates, discounts and payments (% any) – by business size (FTEs)



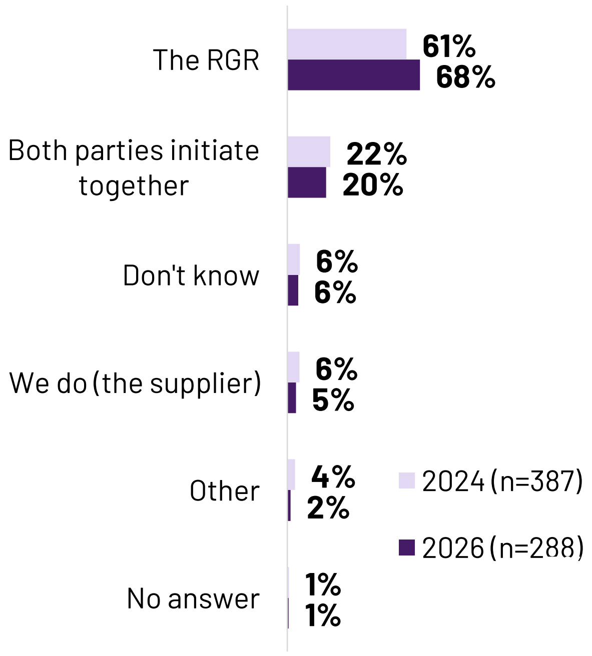
Types of rebates, discounts and payments agreed with retailers



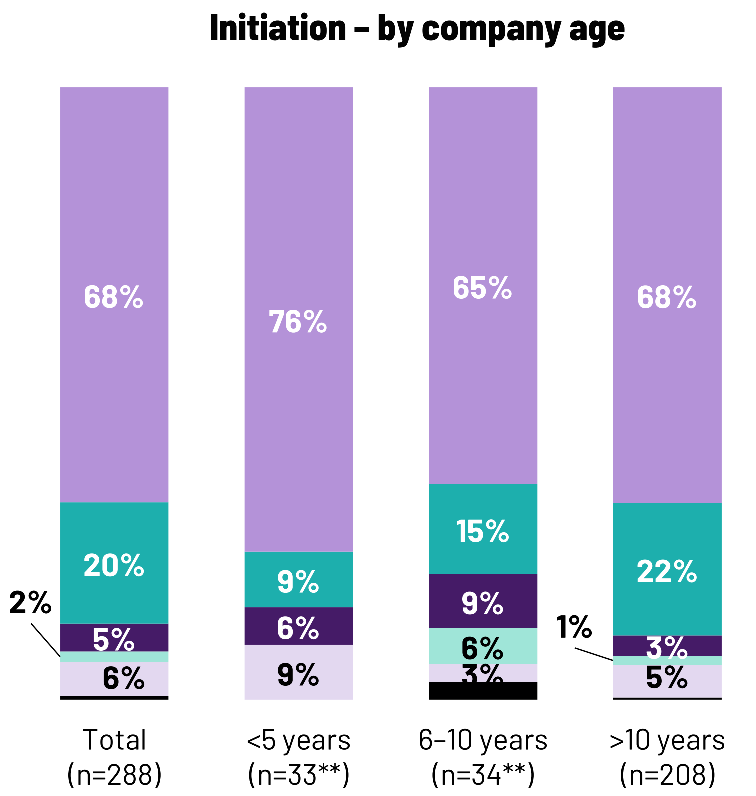
Which of the following types of rebates, discounts, or payments do you currently have in place with retailers?
***Base: 2024** – Total (n=500), <20 employees (n=260), 20-99 employees (n=137), ≥100 employees (n=66*); **2026** – Total (n=340), <20 employees (n=177), 20-99 employees (n=93*), ≥100 employees (n=41*). ***CAUTION:** Low base (50≤ n <100). ****CAUTION:** Very low base, indicative results only (n<50).*

Initiation of rebates, discounts, and payments with retailer

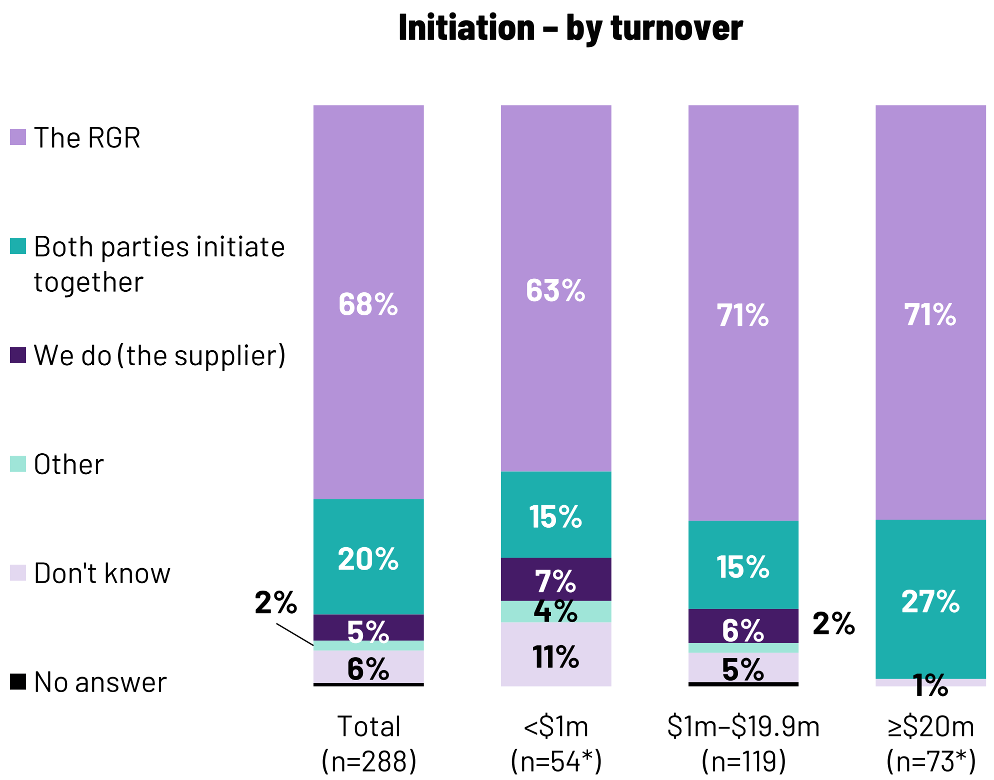
Overall, there has been no significant change in how these agreements are initiated, with the majority stating they are RGR initiated & very few being initiated by the supplier alone.



Respondents from newer businesses are most likely to suggest that their agreement is RGR initiated.



There is little variance in agreement initiation by supplier turnover. Newer businesses appear a little less likely to know how the agreement was initiated.



Who typically initiates rebate, discount, and payment agreements with RGRs?

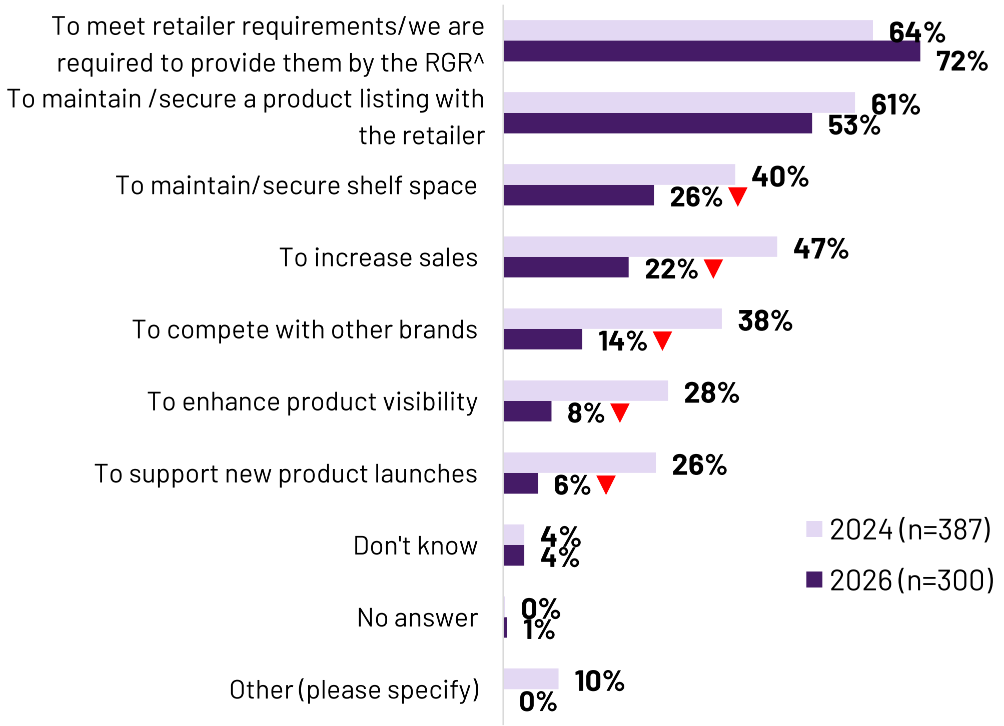
Base: *All suppliers with rebates, discounts, and payments in place - base sizes in chart. 2026 results split by company age and turnover – base sizes in chart.* ****CAUTION:*** *Low base (50≤ n <100).* *****CAUTION:*** *Very low base, indicative results only (n<50).*

Reason for rebates, discounts and payments with RGRs

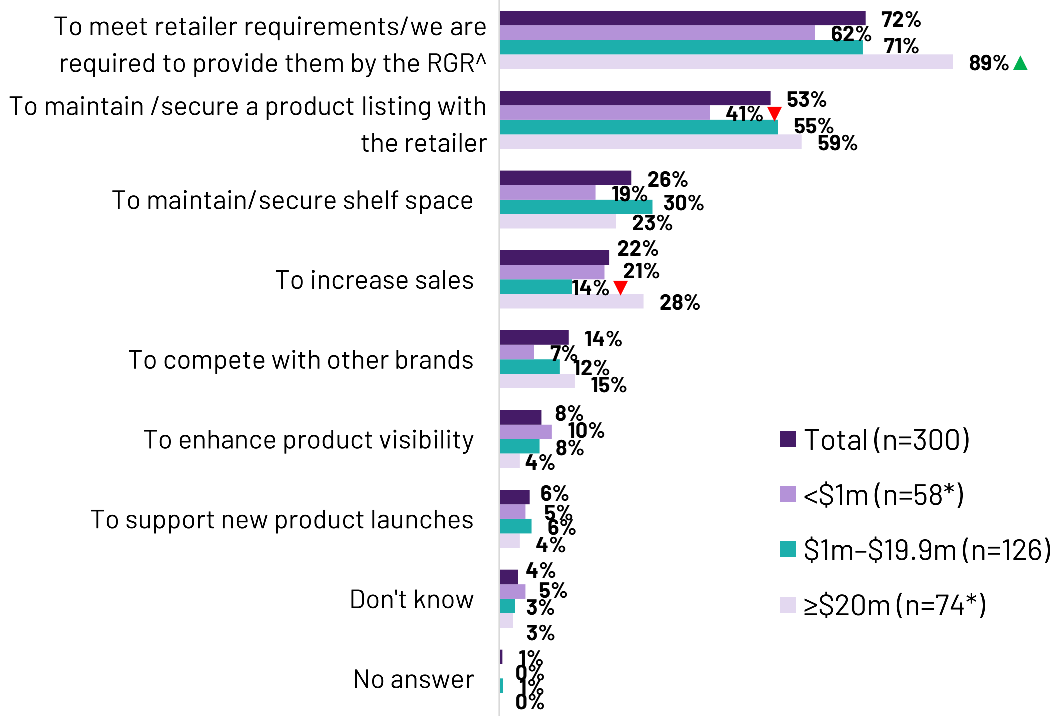
Respondents are significantly less likely to make these agreements to enhance product visibility, support new launches, maintain shelf space, compete with other brands, or increase sales.

While a key motivation for agreeing to rebates, discounts & payments is to maintain or secure product listings, this is significantly less common a motivation for lower-turnover suppliers. Higher-turnover suppliers are significantly more likely to do so to meet retailer requirements.

Overall reasons for rebates, discounts, or payments



Reasons – by turnover



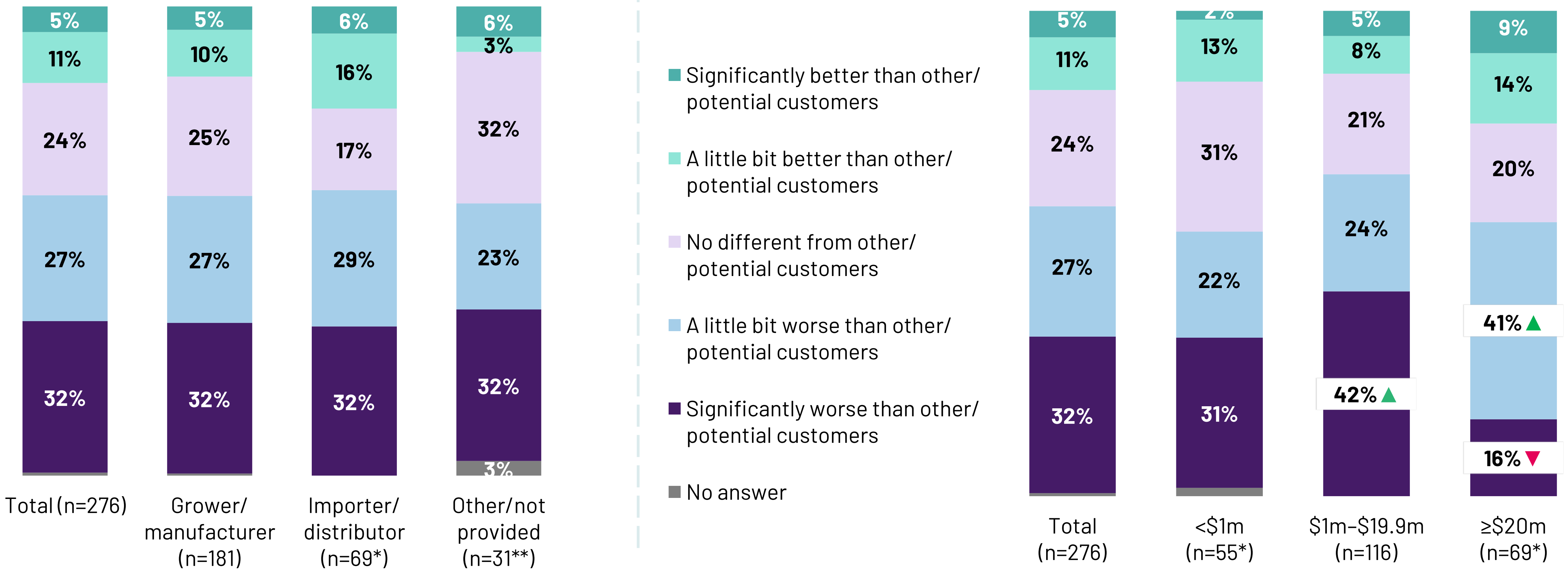
▲/▼ is statistically significantly higher/lower than the 2024 sample

What are the main reasons you agree to these rebates, discounts, or payments with RGRs?

Base: *Those agreeing to rebates, discounts, or payments – base sizes in chart.* ***^Note:*** *'We are required to provide them by the RGR' was added as a new answer option in 2026.* ****CAUTION:*** *Low base (50≤ n <100).*

Difference in supply agreements

Respondents of all types are more likely to state that the terms with RGRs are worse for them than those with other retailers. However, this is less pronounced among higher-turnover respondents, who are significantly less likely to state the terms are ‘significantly worse’.



▲/▼ is statistically significantly **higher**/**lower** than the total sample

To what extent does the agreement/terms and conditions between you and [RGRS] differ from those with other retailers (e.g., retailers and wholesalers ...)

Base: *All suppliers supplying at least one RGR supply greater than 1% of their output to other retailers or wholesalers – base sizes in chart.* ****CAUTION:*** *Low base (50≤ n <100).* *****CAUTION:*** *Very low base, indicative results only (n<50).*

WHOLESALE SUPPLY

07

Key findings: Wholesale supply

About half of respondents indicate a wholesaler relationship, with growers and manufacturers most likely to do so.

Importers and distributors are more likely to state that they don't supply wholesalers because *they have their own distribution networks*.

Survey respondents of all types also choose not to supply wholesalers due to a preference for *direct relationship*, *insufficient demand*, and *pricing issues*: these are relatively common reasons across all supplier categories.

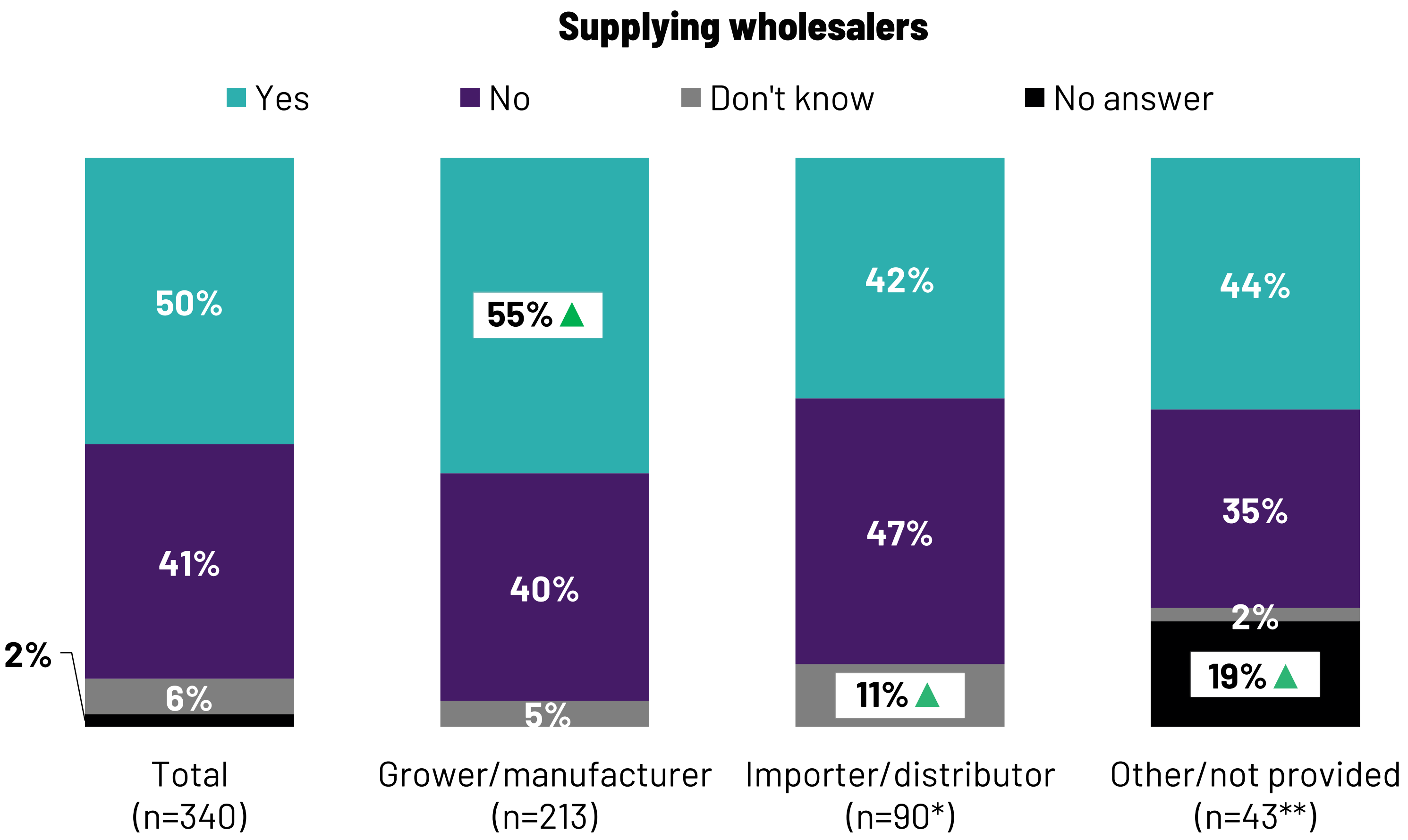
	Total	Grower/ manufacturer	Importer/ distributor	Other supplier types
Wholesale supply	**50%** Supply to	**55%** Supply to	**42%** Supply to	**44%** Supply to
Have own distribution networks	**26%** Have networks	**21%** Have networks	**38%** Have networks	**-** Have networks*

DATA SUPPRESSED: *Subgroup sample <30 suppliers, not valid for analysis.*

Wholesale supply

About half of respondents reported also supplying wholesalers.

This is more common among growers and manufacturers, but mainly because importers, distributors and other supplier types are less likely to know for certain whether they supply wholesalers.



▲/▼ is statistically significantly higher/lower than the total sample

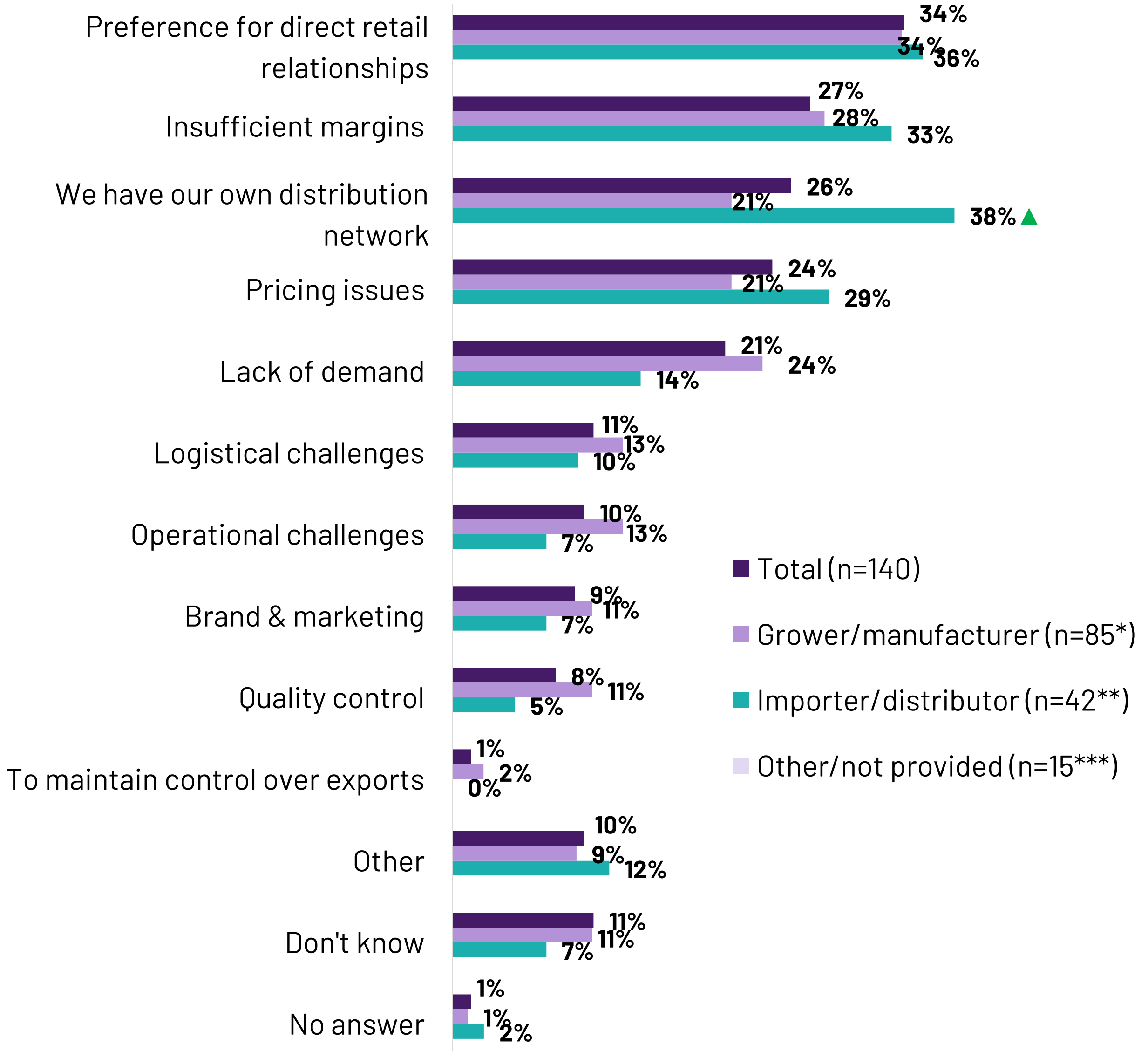
Do you supply products to a wholesaler (including to an RGR wholesale branch) (e.g. retailers and wholesalers that are not Regulated Grocery Retailers (RGRs)?

***Base:** Total sample 2026 - base sizes in chart. ***CAUTION:** Low base (50≤ n <100). ****CAUTION:** Very low base, indicative results only (n<50).*

Reasons for not supplying to wholesalers

About a third of those not supplying wholesalers have a preference for direct relationships & just over a quarter state they offer insufficient margins or they have their own distribution networks.

Importers and distributors are significantly more likely to have their own distribution network, with nearly 2 in 5 citing this as a reason for not supplying wholesalers.



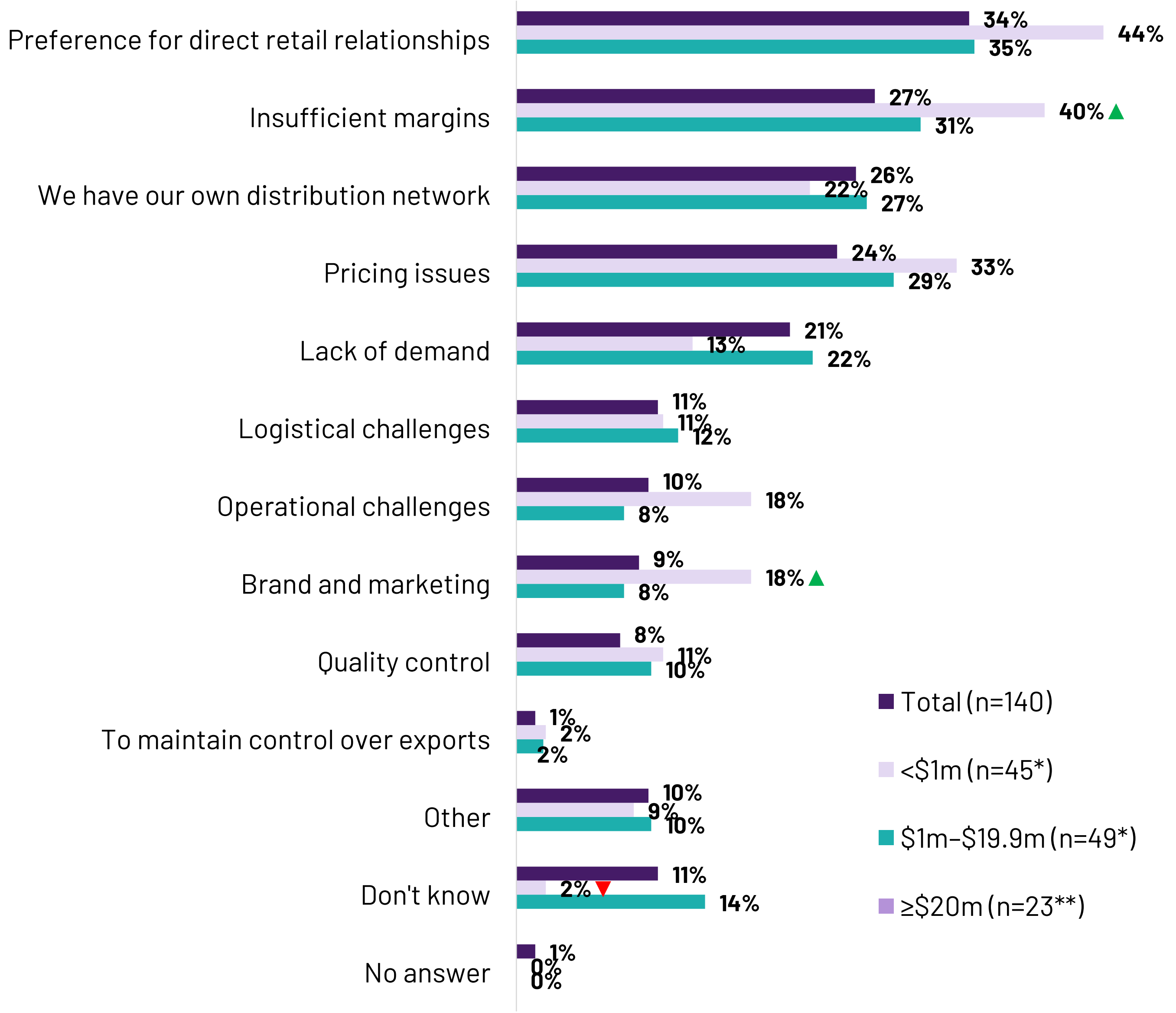
▲/▼ is statistically significantly **higher**/**lower** than the total sample

What are your main reasons for not supplying products to a wholesaler?

Base: *All businesses not supplying wholesalers, 2026 – base sizes in chart.* ****CAUTION:*** *Low base (50≤ n <100).* *****CAUTION:*** *Very low base, indicative results only (n<50).* ******DATA SUPPRESSED:*** *Subgroup sample <30 suppliers, not valid for analysis.*

Reasons for not supplying to wholesalers

Lower-turnover businesses are significantly more likely to cite insufficient margins and brand and marketing as reasons for not supplying wholesalers.



▲/▼ is statistically significantly higher/lower than the total sample

What are your main reasons for not supplying products to a wholesaler?

***Base:** All businesses not supplying wholesalers, 2026 – base sizes in chart. ***CAUTION:** Very low base, indicative results only (n<50). ****DATA SUPPRESSED:** Subgroup sample <30 suppliers, not valid for analysis.*

APPENDIX

08

Survey wording updates in 2026 (i)

Note: **Several answer options were added to questions this year where detail was sought on issues. These were identified by common themes in open-ended *'Other (specify)'* responses. In the report, they are not shown as a significant increase from 2024 data, as answers were given but cannot be quantified.**

Wording changes:

- **Retail banners (SOQ3)** – *"Which retail banners do you supply products to?"* was changed to *"Which retail banners do you supply products to, or have supplied products to in the last 12 months?"*
- **Other retailers (SOQ4)** – *"Other than the major supermarket chains, what other retailers do you supply products to?"* was changed to *"And who else do you supply products to?"*
  - *"Direct to consumers through your own website or store"* was added as a response option.
- **Groceries supplied to retailers/wholesalers (SOQ5)** – *"What products do you supply to grocery retailers and/or wholesalers?"* was changed to *"What groceries do you supply to grocery retailers and/or wholesalers?"*
  - *"Pharmaceuticals (including prescription only and over the counter medicines)"* was added as a response option.
- **How terms and conditions differ between RGRs and other retailers (SOQ8)** – *"Compliance requirements"*, *"Rebates and discounts"*, *"Control over promotion and display conditions"*, and *"Unique fees or charges specific to the supplier"* were added as response options.
- **Wholesalers (WSQ2)** – *"Bidfood"*, *"Service Foods"*, *"Tasman Bay Food Co."*, and *"Moore Wilson's"* were added as response options.
- **Signed a new supply agreement (EXPQ4)** – *"Has [INSERT RGR] offered you a new/updated supply agreement this year?"* was changed to *"Have you signed a new supply agreement with [INSERT RGR] in the past 12 months?"*
  - The response options were changed from *"Yes, No, Don't know"* to *"Yes, we have signed a new supply agreement, No, we have not signed a new supply agreement, No, we do not have a supply agreement with [INSERT RGR], Don't know"*.
- **Issues faced (ISQ1)** – *"Transport and logistics"* and *"Communication issues"* were added as response options.
- **Promotions issues (ISQ2)** – *"Pressure to pay for promotions/Being required to pay for promotions that seem unreasonable"* was added as a response option and *"Failure to deliver an agreed promotion"* was updated to *"Failure to deliver an agreed promotion (e.g. not passing on/loading the promotion or sales above funded promotion price)"*.
- **Delisting issues (ISQ3)** – *"Delisting due to communication issues/error (including access and use of data)"* and *"Delisting when unable to meet pricing or margin demands"* were added as response options.
- **Reasons for agreeing to rebates, discounts and payments (RDPQ5)** – *"We are required to provide them by the RGR"* was added as a response option.
- **Visibility of cost of rebates, discounts and payments (RDPQ8)** – *"How certain are you about the overall cost of the rebates, discounts, or payments before entering into an agreement with [INSERT RGR]?"* was changed to *"To what extent do you have visibility and certainty of the total costs of rebates, discounts, or payments before finalising the agreement with [INSERT RGR]?"*
- **Satisfaction with value of rebates, discounts and payments (RDPQ10)** – *"How satisfied are you with the value you receive for the payments made towards the rebates, discounts, or payments with [INSERT RGR]?"* was changed to *"How satisfied are you with the value (information received, certainty activities are being performed) you receive for the payments made towards the rebates, discounts, or payments with [INSERT RGR]?"*

Survey wording updates in 2026 (ii)

New questions added:

- **Difference in terms and conditions between RGRs and other retailers (SOQ7)** – *"Do the agreements/terms and conditions you have with Regulated Grocery Retailers (RGRs) you supply differ in a better or worse way compared to those from other customers and potential customers that are not Regulated Grocery Retailers (RGRs)?"* was added as a new question to replace it's equivalent in the 2024 survey. The response options were also updated.
- **Information provided by wholesalers (WSQ5**) – *"Thinking now about wholesalers and distributors who sell on your product. What information, if any, do they tend to provide regarding your product?"* was added.
- **Order requirements with wholesalers (WSQ6)** – *"What sort of order requirements do you have with the wholesalers and distributors who sell on your product? We recognise that you may have different requirements with different wholesale customers, so please select all that apply"* was added.
- **Factors affecting cost to serve wholesalers (WSQ7)** – *"Which, if any of the following factors most affect the cost to serve your products to wholesalers?"* was added.
- **Customer segment with highest cost to serve (WSQ8)** – *"Which one of the customer segments that you supply would you say has the highest cost to serve?"* was added.
- **Negotiated supply agreement terms (EXPQ5)** – *"Did you negotiate any of the terms in your new supply agreement with [INSERT RGR]?"* was added.
- **How accommodating during negotiations (EXPQ6)** – *"How accommodating do you feel [INSERT RGR] was during the negotiations?"* was added.
- **Reasons for not negotiating terms (EXPQ7)** – *"Which of the following reasons best describes why you didn't negotiate any of the terms in your agreement with [INSERT RGR]?"* was added.
- **Grocery Supply Code review (CODEQ2)** – *"Are you aware that the Grocery Supply Code has been recently reviewed?"* was added.
- **Rebates, discounts and payments (RDPQ1)** – *"Which of the following types of rebates, discounts or payments do you currently have in place with retailers?"* was added as a new question to replace its equivalent in the 2024 survey. The response options were replaced with a more comprehensive list.
- **Difference between rebates, discounts and promotions provided to RGRs vs other retailers (RDPQ4)** – *"In what ways do the rebates, discounts, or payments you provide to Regulated Grocery Retailers (RGRS) differ from those agreed with other retailers (e.g., retailers and wholesalers that are not Regulated Grocery Retailers (RGRs)?"* was added.

Survey wording updates in 2026 (iii)

Removed questions:

- **Private label** - *"Do you supply private label products to [INSERT RGR ONE AT A TIME]?"* was removed.
- **Supply terms** – *"To what extent does the agreement/terms and conditions between you and [INSERT RGRs CURRENTLY SUPPLYING TO (CODE 1) AT RGR_SUPPLY] differ from those with other retailers (e.g., retailers and wholesalers that are not Regulated Grocery Retailers (RGRs)"* was removed and replaced with SOQ7.
- **Wholesale fresh produce issues** – *"Have you experienced any issues in relation to fresh produce wholesalers?"* was removed.
- **Detail of fresh produce issues** – *"Please explain what issues you've faced with fresh produce wholesalers?"* was removed.
- **Supply agreement perceptions** – *"What are your thoughts on the supply agreement offer made to you?"* was removed.

THANK YOU

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