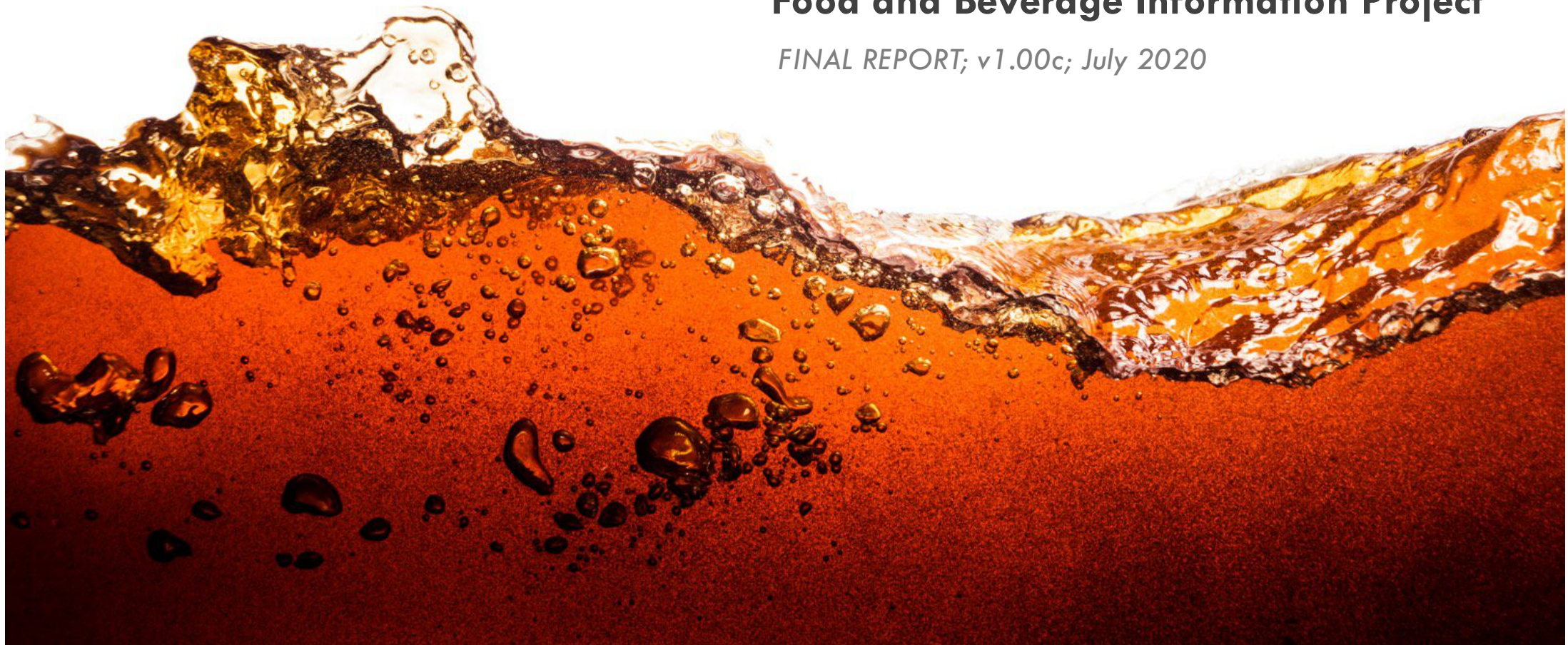


OPPORTUNITIES IN NEW ZEALAND NON- ALCOHOLIC BEVERAGES

**Part of Emerging Growth Opportunities,
Food and Beverage Information Project**

FINAL REPORT; v1.00c; July 2020





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STEERING & GUIDANCE

This project would not have been possible without the strong guidance of our Steering Committee. In particular, we would like to thank Andrew McCallum of MBIE for his tireless energy in keeping this project on track, while at the same time pushing us forward.

Draft versions of this report, including the firm profiles, were distributed to those firms for comment, addition or correction. This was done in the form of emails and phone calls. We thank those that helped us in this process for their time and effort. We also thank those that provided them for their photos.

We are grateful for all of the input we have

received, but the report is ours and any errors are our own.

Finally, we acknowledge the support of the Ministry of Business, Innovation and Employment (MBIE), New Zealand Trade and Enterprise (NZTE) and the Ministry for Primary Industries (MPI). It is their funding that has made this report possible.

LIMITATIONS

This work is based on secondary market research, analysis of information available (e.g. Statistics NZ), and a range of interviews with industry participants and industry experts. Coriolis have not independently verified this information and make no representation or warranty, express or implied, that such information is accurate or complete. In many cases regional data is incomplete or not available and therefore research includes significant modelling and estimates.

All cross-country international trade data analysed in this report is calculated and displayed in US\$. This is done for a range of reasons:

- *It is the currency most used in international trade*
- *It allows for cross country comparisons (e.g. vs. Denmark)*
- *It removes the impact of NZD exchange rate variability*
- *It is more comprehensible to non-NZ audiences (e.g. foreign investors)*
- *It is the currency in which the United Nations collects and tabulates global trade data*

KEY CONTACTS FOR THIS REPORT

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If at any point you are unclear where a number came from or how a conclusion was derived, please contact the authors directly. We are always happy to discuss our work with interested parties.

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Why did the New Zealand government undertake this project?

WHAT IS THE PURPOSE OF THE FOOD AND BEVERAGE INFORMATION PROJECT?

The project pulls together the available information on the food and beverage industry into one place, in a form which is familiar and useful to business. The reports contain analysis and interpretation of trends and opportunities to materially assist with business strategy and government policy.

The information will be of vital use to businesses, investors, government, and research institutions as the industry expands and diversifies. This industry view will be very useful to government, enabling better dialogue and the opportunity to address issues collectively.

WHAT BENEFIT WILL THIS BRING TO BUSINESSES?

The Project will have many uses for businesses. These include:

- As a base of market intelligence to enable business to be much more targeted in their own market research
- Reviewing and informing offshore market development (including export and investment) strategies
- Assisting in identifying areas of innovation and R&D for the future
- Identifying strategic partners and collaborators
- Enabling a company to benchmark performance with that of its competitors

- Monitoring industry activity
- Gaining a better understanding of their own industry sector
- Identifying internal capability needs or external inputs

HOW WILL GOVERNMENT USE THE REPORTS?

This information will provide much greater insight into the industry, which is useful for a range of policy developments, from regulatory frameworks to investment in science and skills and facilitating access to international markets. In particular, a single source of factual information will enable government agencies to better coordinate their efforts across the system and be more responsive to addressing industry issues. The government can now understand what's what, and also, who's who.

The Emerging Growth Opportunities (EGO) research is part of the wider New Zealand Food and Beverage Information Project

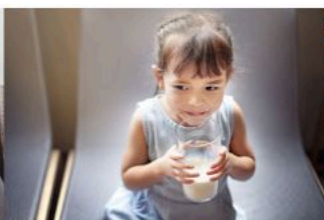
The Food & Beverage Information Project

SECTOR REPORTS



Beverages

The New Zealand wine industry has achieved phenomenal growth, producing world renowned wine varieties.



Dairy

New Zealand is a global leader in dairy trade, gaining export market share in the past decade.



Meat

New Zealand is the global leader in lamb and deer meat exports, with a strong position in beef exports and growing chicken exports.



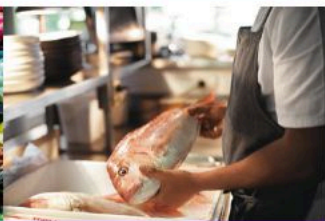
Processed foods

New Zealand has a rapidly growing processed foods sector, leveraging on available raw and unique materials.



Produce

New Zealand is a major producer and exporter of kiwifruit and apples, with significant growth achieved in other categories.



Seafood

New Zealand has a large and sustainable wild catch fishery, with aquaculture showing huge theoretical growth potential.



INVESTOR GUIDES



Investor guides

Our research has identified twenty categories achieving success in strong growing markets.



EMERGING MARKETS



Emerging markets

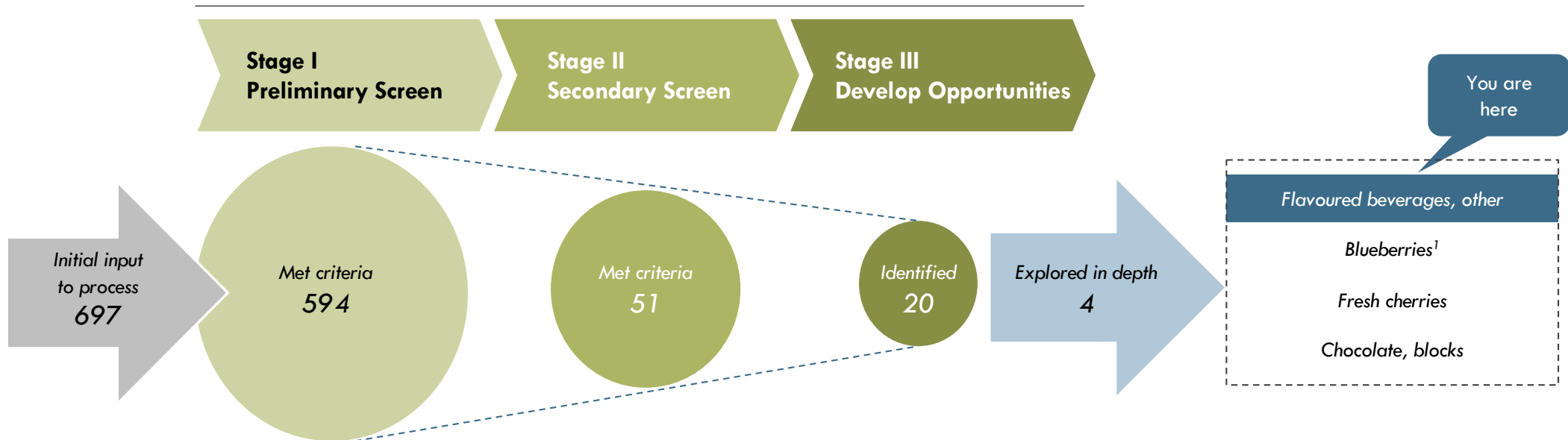
New Zealand food and beverage sector has significant opportunities in Australia, ASEAN and China markets due to FTAs and geographical proximity.



Non-alcoholic beverages emerged in a multi-stage screen designed to identify high potential food and beverage export opportunities

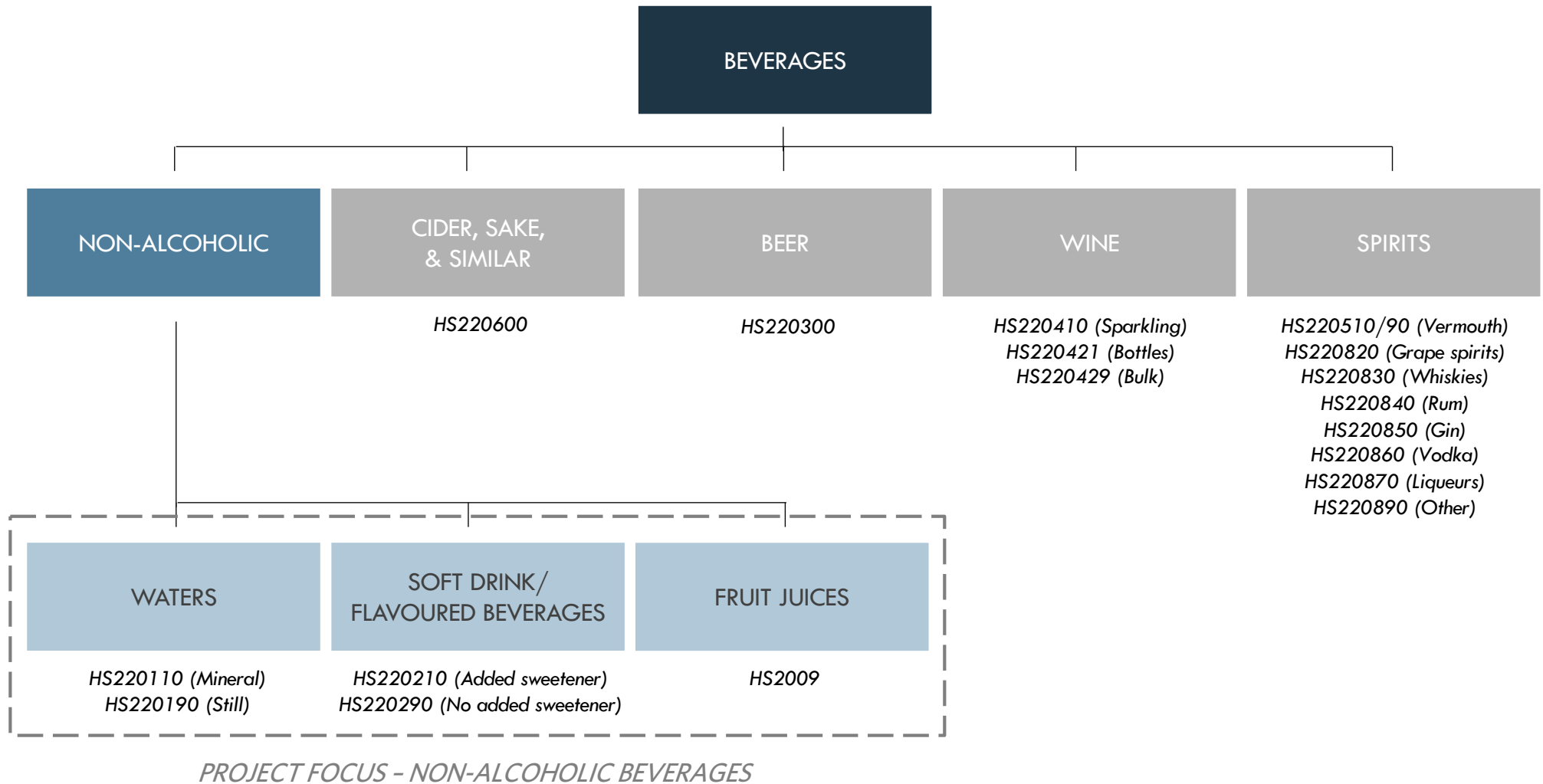


See related document for details available at <https://www.mbie.govt.nz/business-and-employment/economic-development/growing-the-food-and-beverage-sector/food-and-beverage-information-project/food-and-beverage-emerging-market-and-in-depth-reports/>



1. Short list was revised by project steering group to include blueberries [HS081040] (was initially breakfast cereal & muesli bars [HS190410]); see page 28 of above linked document for details

This research is focused on non-alcoholic beverage exports



EXECUTIVE SUMMARY 01

This report “Opportunities in New Zealand Non-Alcoholic Beverages” was commissioned by MBIE as part of the Food and Beverage Information Project. Beverages - both alcoholic spirits and non-alcoholic (NAB*) beverages - were identified as growth sectors in previous “Emerging Growth Opportunities” research.

WHAT ARE NON-ALCOHOLIC

BEVERAGES?

In this report non-alcoholic beverages include juice, water, and soft drinks (and other similar flavoured beverages). In practice, the vast majority of beverages have a water base with added ingredients (e.g. flavouring, fruit, carbonation, sugar, etc.) for cost reasons.

WHAT IS THE SITUATION IN NZ?

New Zealand has a long history in non-alcoholic beverages production that can be segmented across three broad eras of development. In the early “Pioneer Era” (1860’s-1930s), the sector was dominated by a range of small aerated water and cordial

firms focused on the domestic market (e.g. Foley’s). In the “Production Era” (1930’s-1990’s), global multi-nationals arrived (e.g. Coca Cola) and firms sought scale.

Now, today in the “Innovative Era” (2000 to today), a huge range of new products, ingredients and categories are being developed through the spread of premium, authentic producers (e.g. Karma Drinks).

Where the industry created almost 140 firms in the Pioneer Era, while the Production Era saw a rapid decline in firms down to 24, the Innovation Era has again seen a rapid rise in firm numbers to over 140 firms.

The New Zealand non-alcoholic beverage industry is growing in unit numbers and total employment. The industry now employs 1,700 people. These firms and jobs are not just located in the major population centres like Auckland. Instead beverage firms are spread across the country, with long term growth occurring across most regions.

New Zealand non-alcoholic beverages are sold on the domestic market and exported. In

2019, New Zealand exported NZ\$282m worth of non-alcoholic beverages (NAB) across three broad categories: juices (26%), waters (21%), and soft drinks/flavoured beverages (53%). New Zealand’s NAB export value mix has grown and changed dramatically over the last twenty years. In 1988 juices dominated exports with over 95% value share. By 2019 this had declined to 37% and soft drinks now accounted for a 53% export share. NAB export growth is being driven by soft drinks and waters.

MARKETS

New Zealand non-alcoholic beverages exports can be segmented into three key markets, each with different strategic priorities: (1) Australia, (2) Asia, and (3) North America and the UK/EU.

In 2019, New Zealand’s non-alcoholic beverages exports went predominantly to Australia (51%) and E/SE Asia (34%). New Zealand’s NAB export market mix has stayed relatively constant, though China growing in the past six years. Growth in NAB exports are being driven by Australia and China.

* NAB = Non-Alcoholic Beverages is also sometimes called NARTD (Non-Alcoholic Ready-To-Drink)

EXECUTIVE SUMMARY 02

This research seeks to support the continued growth of this exciting and vibrant industry.

JUICE

New Zealand has a long history in fruit production dating back to 1819. Apples and pears dominated the early industry. In the 20th Century, New Zealand pioneered kiwifruit as a commercial crop and Hayward Wright developed the variety that now dominates global production.

Today New Zealand has large and growing fruit production with a range of unique and signature ingredients suitable for beverages (e.g. blackcurrants, feijoa, and kawakawa). New Zealand also produces a range of vegetables regularly used in juices (e.g. carrots, tomatoes, and beetroot).

New Zealand firms now produce a wide range of both everyday juices, and premium products. New Zealand juice exports are achieving relatively stable volumes (20m litres/year) and long term price growth. The total value of juice exports in 2019 was US\$49m. New Zealand juice exports are

shifting focus from Anglo-European regions to Asian markets.

Temperate climate Anglo-European peers suggest that New Zealand could export five to twenty times more juice.

WATER

New Zealand has an abundant supply of quality natural water. New Zealand has a huge renewable water resource (RWR) both (1) on an area basis and (2) on a per capita basis. New Zealand has vast areas of aquifers and thousands of springs located across the country.

Today New Zealand firms produce a wide range of everyday and premium waters.

The total value of New Zealand water exports is growing strongly through growing volumes rather than price increases. Water export value sits at US\$40m, with 113 million litres exported in 2019. Growth in New Zealand water exports is coming from China.

Temperate climate Anglo-European peers suggest that New Zealand could export four

to twenty five times more water. The UK currently exports US\$77m worth of water, the USA US\$151m and France an astonishing US\$980m. To put this in context, if New Zealand exported as much water as France (global #1 by value) this would still only represent an infinitesimal share of New Zealand's available annual water (0.001%).

SOFT DRINKS

The classic American brands like Coke and Sprite come to mind when the phrase "soft drinks" is mentioned. In practice the "soft drink" category today encompasses a much wider range of products.

So what are soft drinks? Soft drinks are effectively water, sweetener and flavourings, typically segmented by flavour. However, the once clear historical segmentation between juice, water and soft drinks has broken down and blurred through constant new product innovation.

Therefore, from a trade point-of-view, most of the new and emerging beverage products are effectively defined as "soft drinks".

EXECUTIVE SUMMARY 03

Once a strong brand is developed, product and line extensions can be used to extend reach and increase shelf presence (e.g. V energy drink has expanded across multiple flavours and formats including iced coffee).

Broadly speaking, within “soft drinks” New Zealand beverage firms produce:

1. “Classic” Soft Drinks (e.g. Foxtan Fizz, Sparking Oh!).
2. Energy Drinks (e.g. V, Monster)
3. Premium Soft Drinks and Mixers (e.g. Karma Cola, Phoenix Tonic water)
4. Sparkling Juices (e.g. Aroha, Vista)
5. Kombucha (e.g. Kombucha Bros, Daily Organics)

Beyond these, Kefir, Kvas and Switchel are all emerging and “on trend”. There is also an emerging overlap with nutraceuticals and “functional beverages” (e.g. Arepa, Granite Life Force Tonic).

The value of New Zealand soft drink exports is growing based on solid volume growth and long term price growth. Soft drinks export

value in 2019 was US\$100m. New Zealand soft drink exports currently go predominantly to regional markets (Australia and the Pacific Islands).

A wide range of peers suggest that New Zealand could export more soft drinks. The UK exports US\$590m, Switzerland US\$1,868 and Austria (the home of Red Bull), US\$2,529m worth of soft drinks.

INDUSTRY STRUCTURE & TRENDS

Since 2000, New Zealand has experience an explosion in new beverage firm formation. A combination of (1) a move by consumers away from “mainstream brands”, (2) the ongoing emergence of new products (e.g. kombucha) and (3) the growth of cafes and other foodservice channels combined to make an environment conducive to new firm formation. This situation is ongoing and a huge range of innovative new beverage firms continues to be launched.

Beyond new firm formation, a wide range of industry trends are visible:

- New Zealand growers are adding value

by moving into juices (e.g. Eden Orchards – cherry juice, Mill Orchard – juice range)

- New Zealand traditional syrup/cordial firms are extending their brands and ranges into ready-to-drink (RTD) (e.g. Addmore Elderflower Cordial extended into an RTD)
- New products are being created around product innovation (e.g. Arepa Nootropic, Brain Drink)
- New Zealand producers are differentiating themselves by using unique local botanicals, particularly horopito and kawakawa (e.g. Taha Kawakawa soda)
- New Zealand firms are increasingly conscious about their packaging and packaging footprint (e.g. For the Better Good, with plant-based bottles)
- New Zealand beverage firms are collaborating with each other (e.g. Batchwell kombucha and Kokako coffee, Denzien Gin and No Ugly kombucha)

EXECUTIVE SUMMARY 04

The beverage industry has a constant stream of new product categories that emerge across the Anglo-European world. In the past energy drinks and sports drinks emerged. More recently we have seen tumeric shots, kefir water and switchel. What will be next? Tepache? Boza? Chicha? or Mageu?

Despite a reputation for innovation, New Zealand typically lags in adoption of beverage trends. In this environment, many firms attempt to be “fast followers”, with varying levels of success.

Beverage firms go through a typical pattern of growth. The history of well known firms like Charlies, Phoenix and Fresh-Up show this pattern emerge. It is easy to be a small beverage company but is capital intensive to grow. Larger beverage firms ultimately end up offering a full range of beverages across all categories and segments to leverage scale.

All four major New Zealand non-alcoholic beverage firms (CCA, Suntory/Frucor,

Asahi/Better Drinks and Kirin/Lion Beverages) are moving towards competing across all categories.

CREATING VALUE FROM RAW MATERIALS

Non-alcoholic beverages is a great category for New Zealand. It transforms high quality New Zealand raw materials into value added consumer products. By doing so, the New Zealand beverage industry creates jobs and export revenue.

The industry has a bright future and a wide range of peer group countries show it can grow five, ten or twenty times larger than it is today.

To achieve this potential, the industry will need to continue to deliver innovative, high quality products to consumers worldwide through investment in products, production and people.

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Appendices

New Zealand's success in non-alcoholic beverages has three key drivers



STRONG COUNTRY IMAGE

Comparable to Switzerland

- "Brand NZ" is strong with clear iconic imagery
- On par with or exceeding Australia, France, Switzerland, the USA and Germany
- Recognised and valued by target consumers
- Unique to NZ plants and flavours
- Secure production in an isolated location protected by natural barriers



EFFICIENT PEOPLE & SYSTEMS

Trusted by consumers

- Long history of fruit growing and breeding
- Long history of export beverage production
- High levels of product innovation
- Historical domestic focus; now pivoting to export
- Large pool of skilled technical people
- Strong systems and support networks



LOCATION & MARKETS

High share in key products

- Free trade agreement with Australia (CER)
- Close proximity to Australia and Asia
- Excellent market access across Asia
- NZ was the first developed country to sign a free trade deal with China (2008)

* Closer Economic Relationship; Source: photo credit (purchased or creative commons (Dollar Photo Club; shutterstock; freenzphotos.com))

New Zealand can continue to succeed in beverages with innovation and sales-and-marketing execution

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> - Abundant supply of sugar (NZ Sugar) and numerous unique raw materials as ingredients; ready access to global flavours and ingredients - Largest global exporter of dairy ingredients - Known and trusted supplier of safe and secure ingredients and products to most major global food & beverage multinationals - Robust regulatory system ensures food produced is safe and suitable - Lower cost structure than Australia or the United States - Low/no corruption, rule of law, efficient court system - Welcoming of foreign investment, particularly greenfields value-added processing - Strong local manufacturing/process technology skills - Customer/consumer awareness, particularly in Asia, of New Zealand as a source of quality, wholesome foods - International surveys highlight high levels of innovation and entrepreneurship - Close proximity to fast growing Asian markets 	<ul style="list-style-type: none"> - Small size of domestic market - Distance to major high value markets (e.g. relative to Ireland and the UK) - Limited pool of domestic or resident capital - Small domestic private equity sector - No rich food and beverage cultural heritage or tradition to draw from for new product development (vs. France or Italy) - Need to import tropical ingredients (i.e. mango); similar to other major producers - Exchange rate variability
OPPORTUNITIES	ISSUES/THREATS/RISKS
<ul style="list-style-type: none"> - Growth of Asian middle class; increasing wealth in Asia - Changing global weather patterns (also a threat) - Rich countries of Europe pricing themselves “out of the game” - Large and growing demand for products with soft characteristics (e.g. sustainable) - A number of alternative channels for beverages - Leverage success of New Zealand food industry; build on awareness of New Zealand in beverages - Growth of busy lifestyles and convenience foods and beverages - Medium-sized NZ firms collaborating on marketing and sales in new markets 	<ul style="list-style-type: none"> - Competitors with lower costs and greater economies of scale - Continued consolidation of global multinationals leading to hollowing out their local offices (both a big challenge and a huge opportunity) - The boom/bust economic cycle expresses itself in China - Global pandemic threatens channels and markets

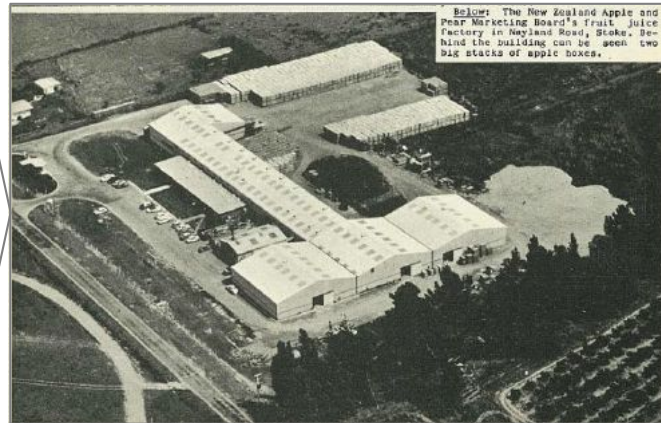
New Zealand has a long history in non-alcoholic beverages across three broad eras of development



PIONEER ERA (1860's-1930's)

Creating

- Range of aerated water and cordial firms founded across New Zealand, including...
 - Wai Wai Mineral Water Co.
 - Foley's / F.P. Foley
 - Moffett & Co.
 - Grey & Menzies
 - McPherson's
 - Paeroa Natural Mineral Water
 - William Barnard & Sons
 - Kia Ora Mineral Water
- Firms were small and primarily targeting the domestic market
- Cordials, ginger beer & aerated water dominate



PRODUCTION ERA (1930's-1990's)

Seeking Scale

- Multiple rounds of takeovers and mergers
- Global multinationals arrive and build or acquire and invest in New Zealand beverage firms
 - Schweppes
 - Coca-Cola
 - PepsiCo
- Significant investment in new factories and factory upgrades; primarily focused on scale production
- New Zealand Apple & Pear Marketing Board (ENZA) manufacturers juice and beverages
- Soft drinks and juices dominate

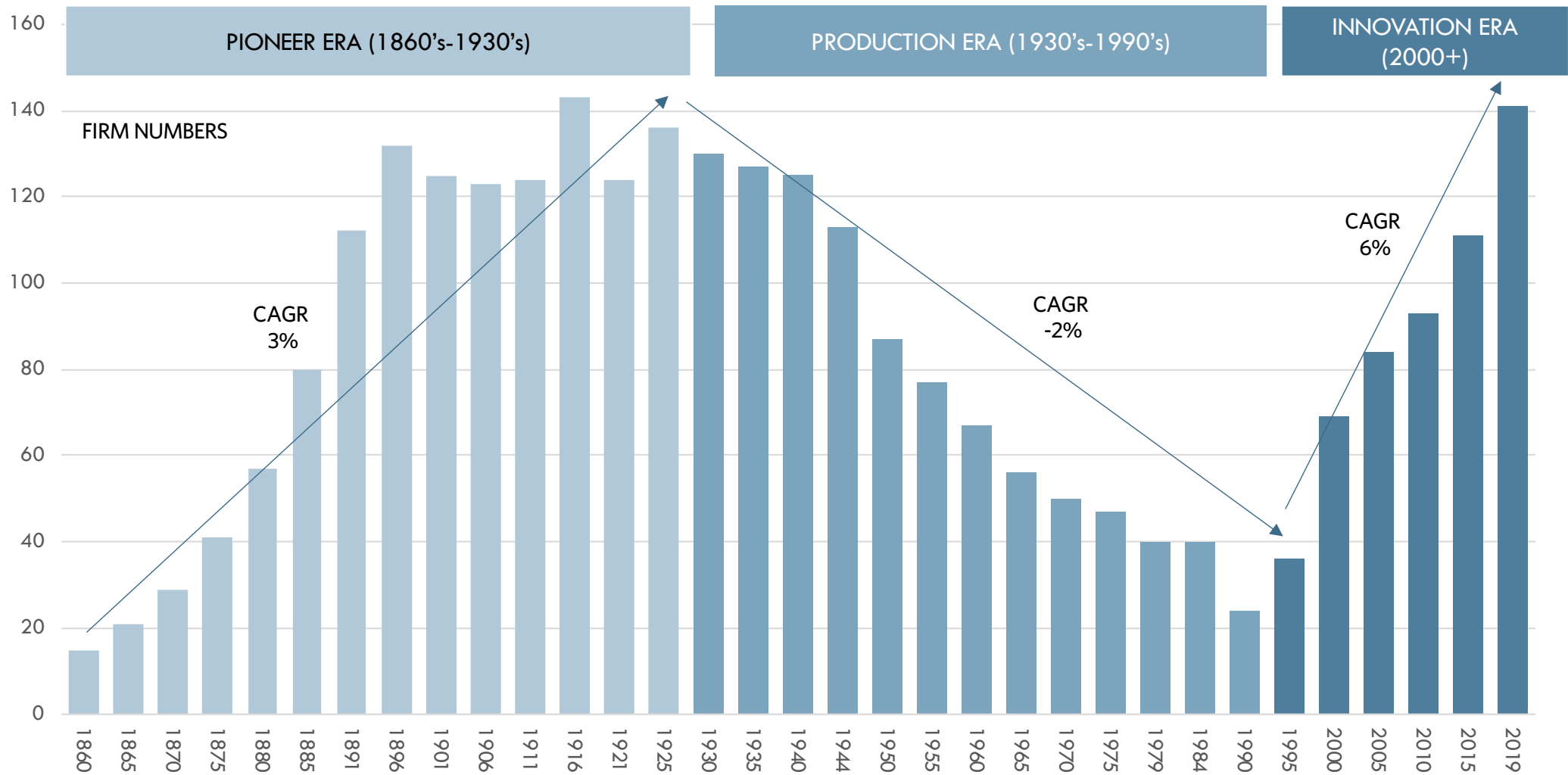


INNOVATION ERA (2000's+)

Innovating

- Spread of premium, authentic production concepts and systems from wine to beer to coffee to non-alcoholic beverages
- New generation of innovators attracted to industry bringing new sensibilities
- New processes and technologies reduce scale requirements and barriers to entry
- Range of innovative new products launched
- Embracing iconic New Zealand flavours and values
- Diverse range of non-alcoholic beverages produced

The New Zealand non-alcoholic-beverages industry is again creating new firms

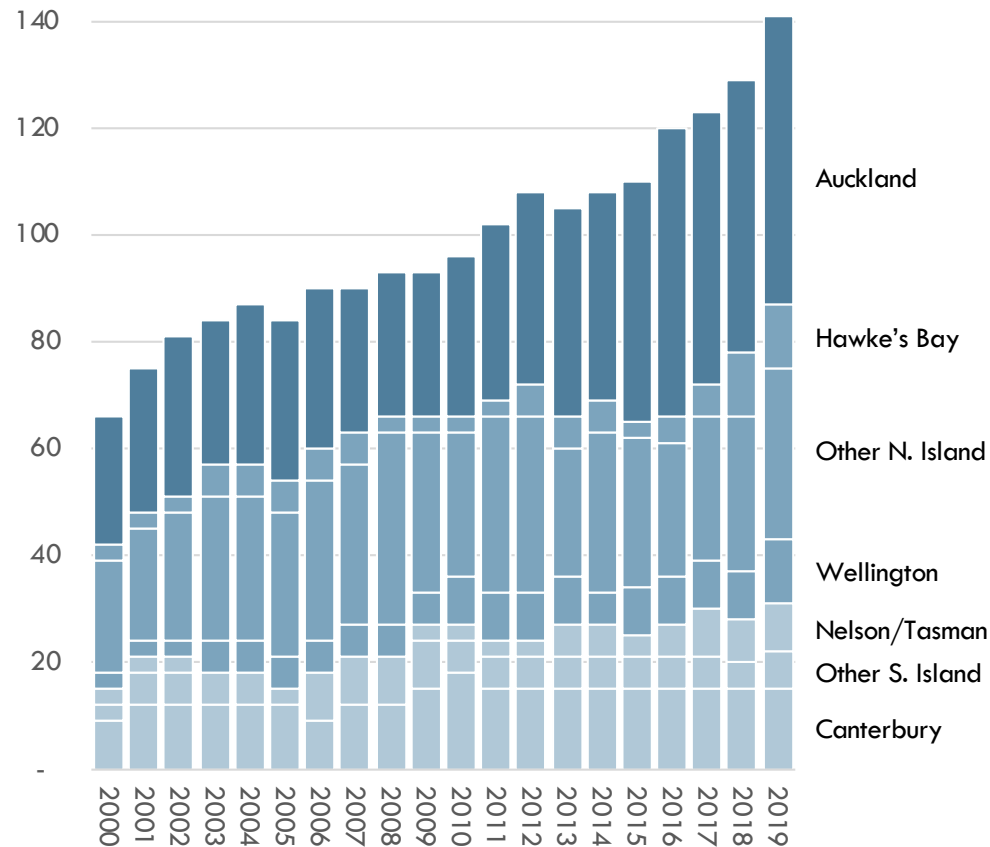


CAGR Compound Annual Growth Rate; data is year given or nearest census; Source: Department of Statistics; Statistics NZ; Coriolis analysis and modelling

The industry is spread across the country, with long term growth occurring across most regions

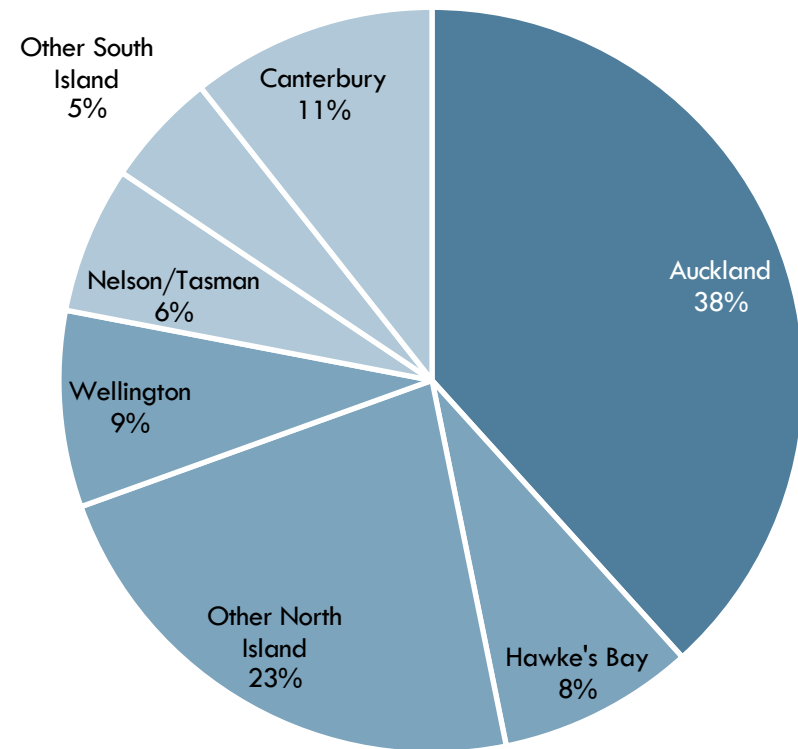
OF MANUFACTURERS BY REGION

Operating units; 2000-2019

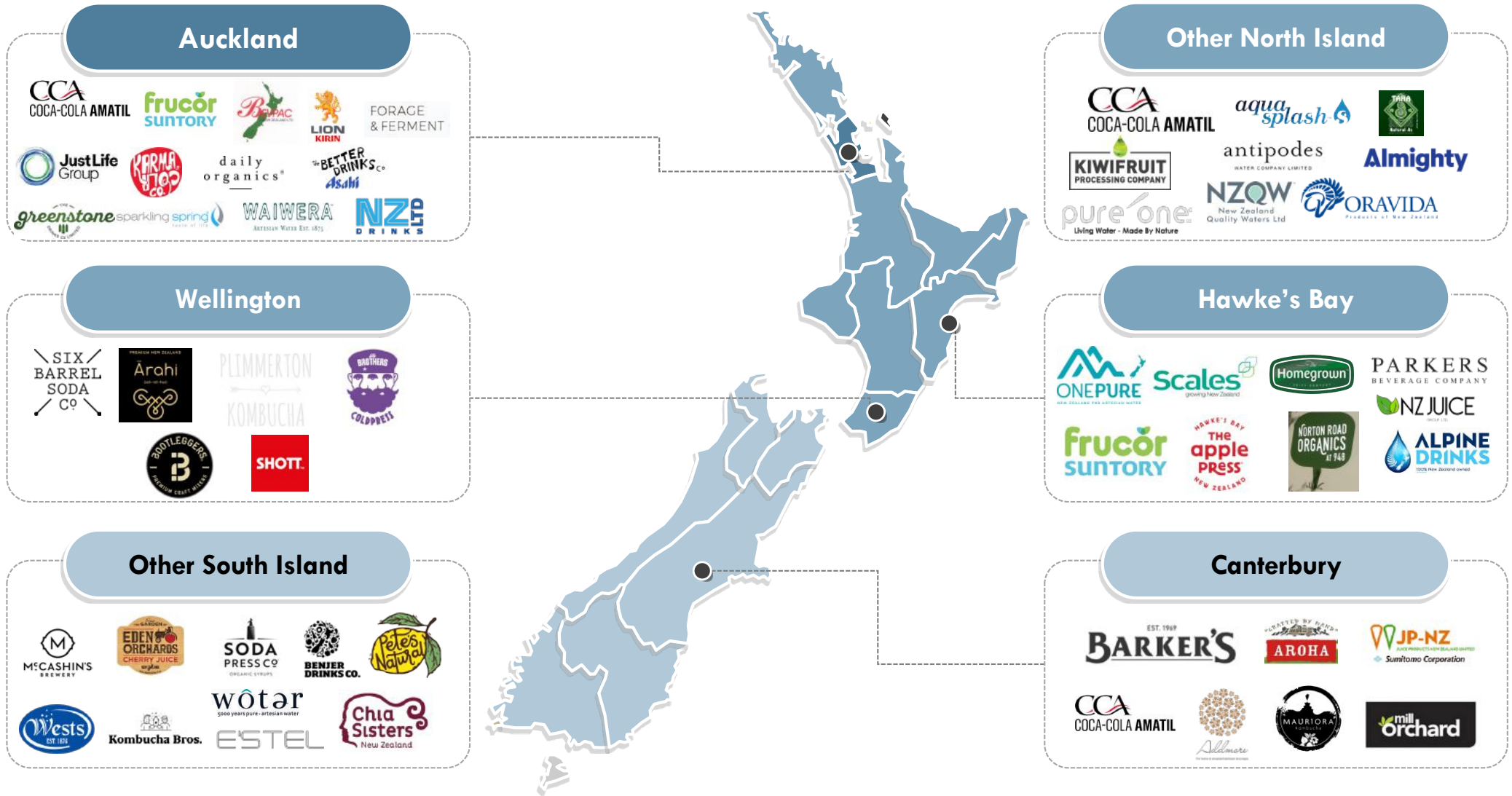


OF MANUFACTURERS BY REGION

Operating units; 2019



New Zealand has beverage companies across all regions

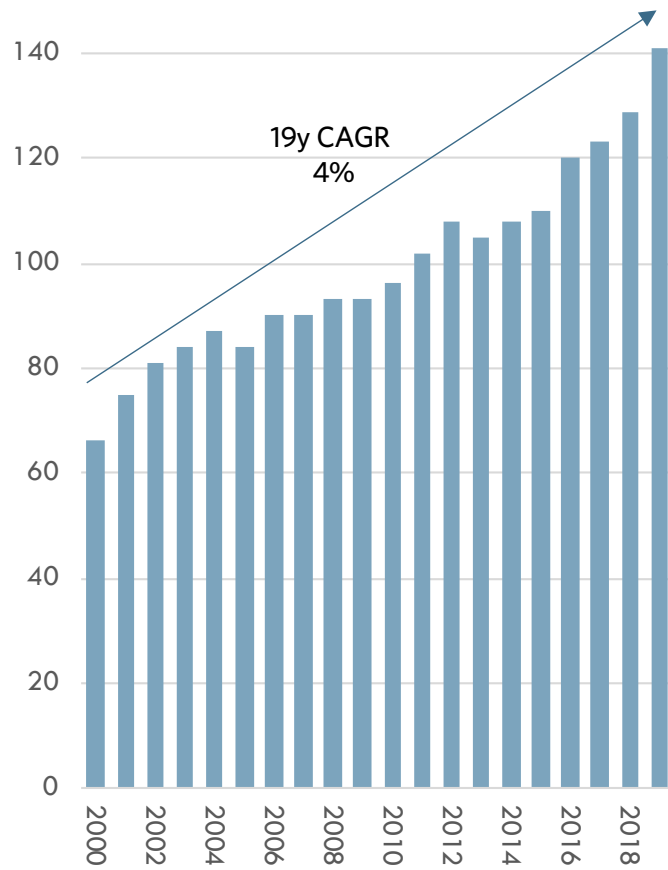


NOTE: Select firms only

The New Zealand non-alcoholic beverage industry is growing both unit numbers and total employment, though with falling scale

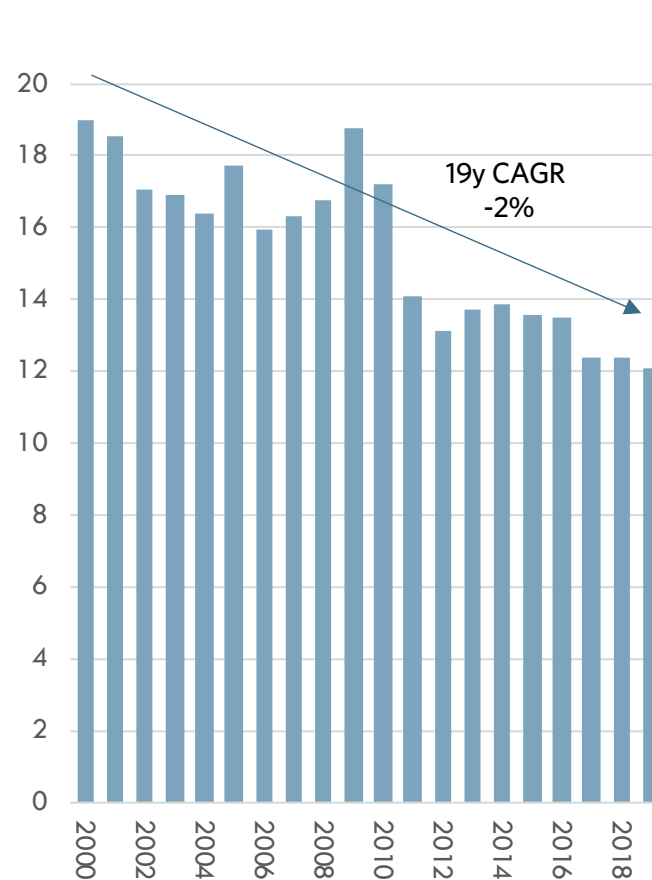
OF OPERATING UNITS

Actual; 2000-2019



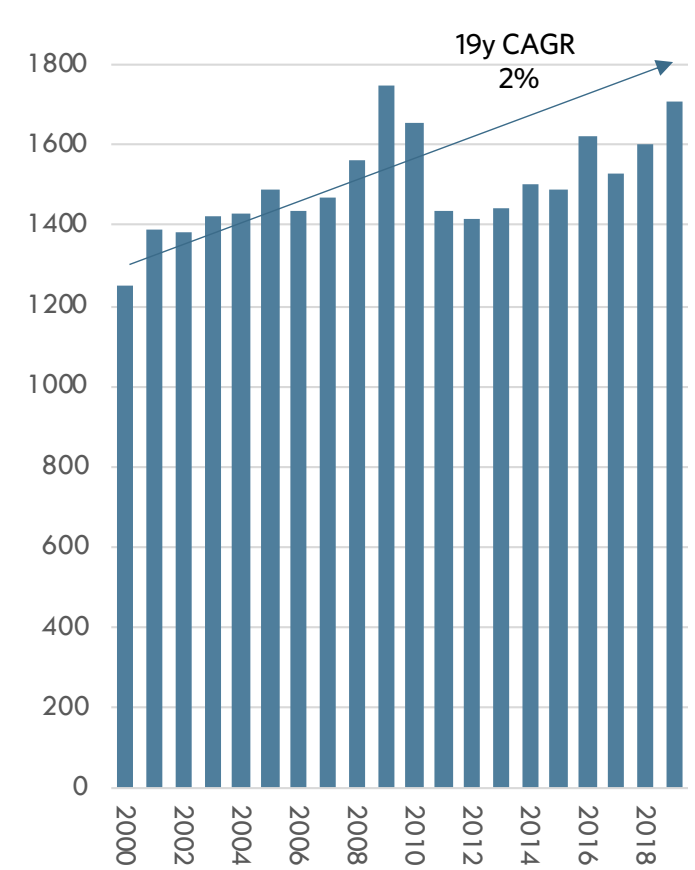
AVERAGE EMPLOYEES/UNIT

Headcount/firm; 2000-2019



INDUSTRY EMPLOYMENT

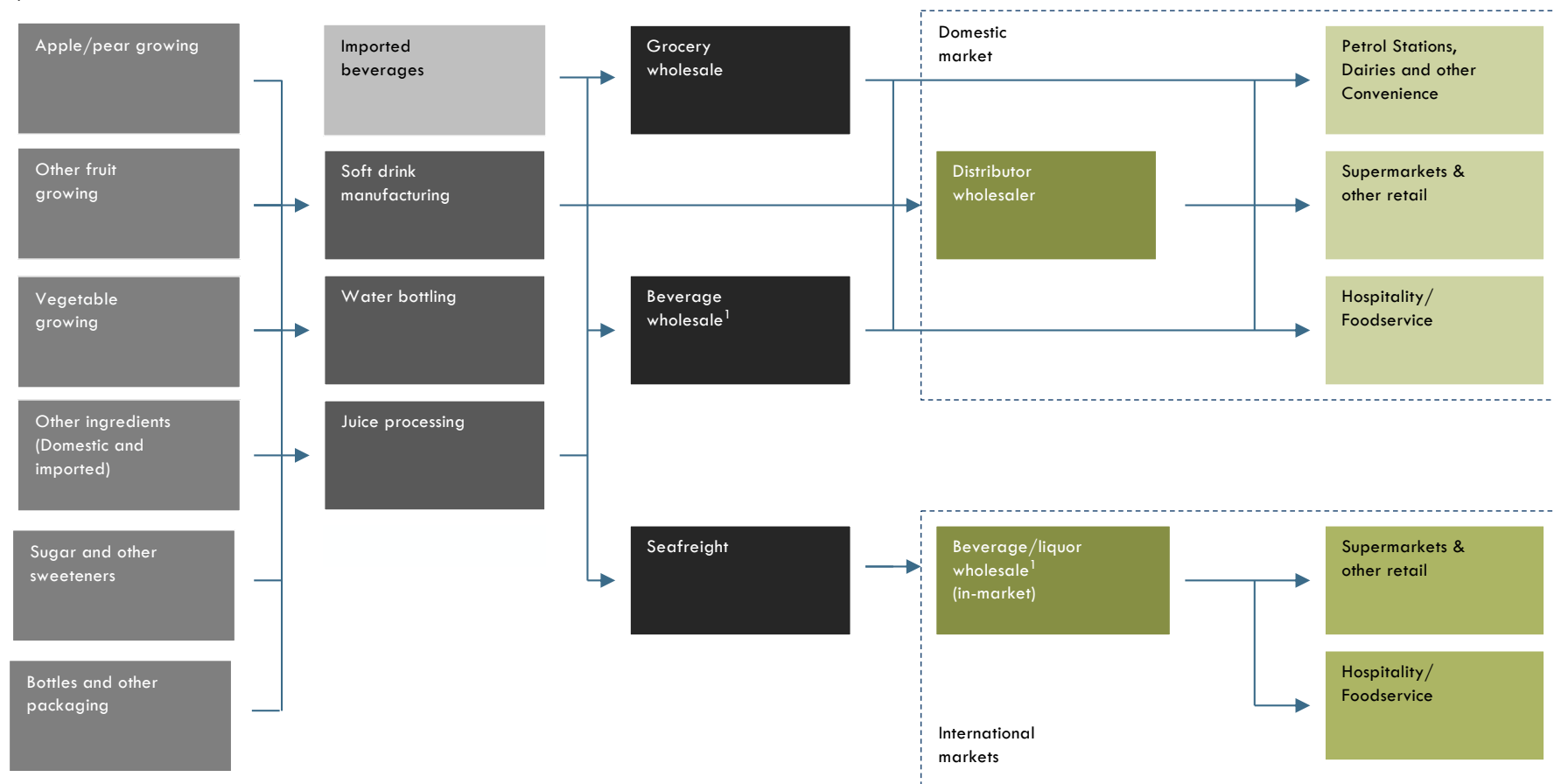
Headcount; 2000-2019



The New Zealand beverage industry has a relatively straight forward supply chain that delivers to consumers worldwide

NEW ZEALAND NON-ALCOHOLIC BEVERAGE SUPPLY CHAIN

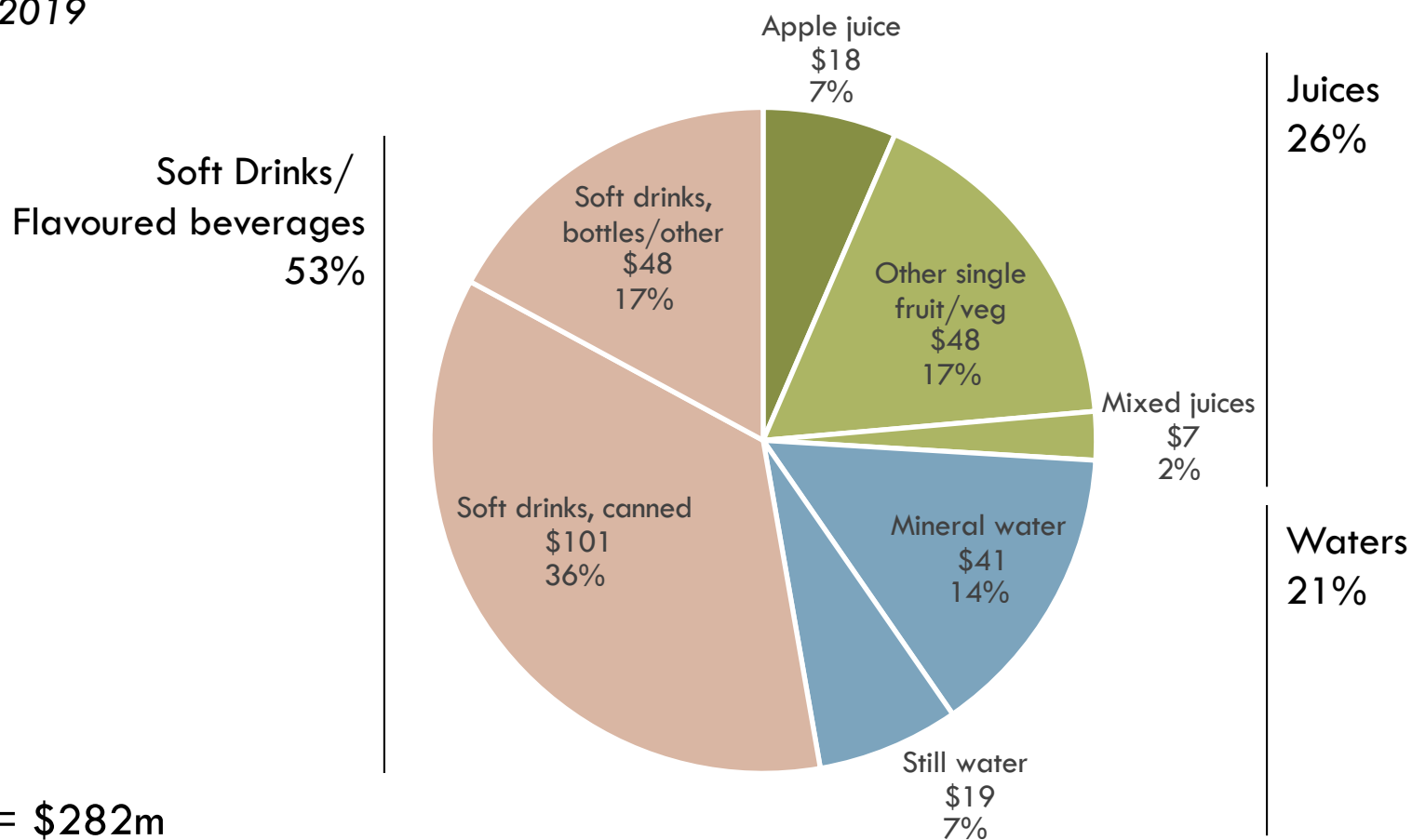
Model; 2020



1. There may be one or more layers of wholesaling, depending on product or market; some wholesale functions may be captive inside manufacturer, retailers or foodservice operators; Source: Coriolis

In 2019, New Zealand exported NZ\$282m worth of non-alcoholic beverages (NAB) across three broad categories

NEW ZEALAND NON-ALCOHOLIC BEVERAGE EXPORT VALUE BY TYPE/SUB-TYPE
NZ\$; m; 2019

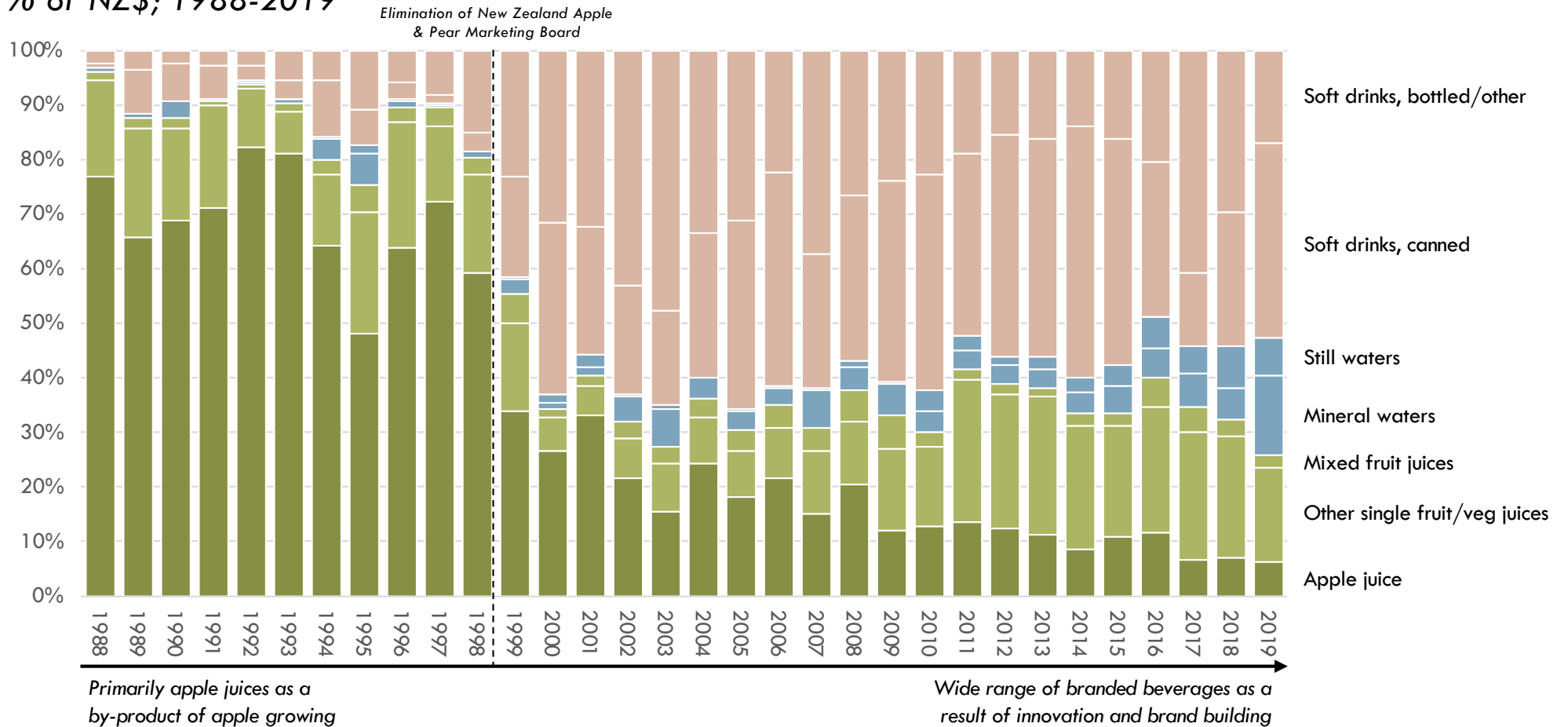


TOTAL = \$282m

New Zealand's non-alcoholic beverages (NAB) export value mix has changed dramatically over the last twenty years

SHARE OF NZ NON-ALCOHOLIC BEVERAGE EXPORT VALUE BY TYPE/SUB-TYPE

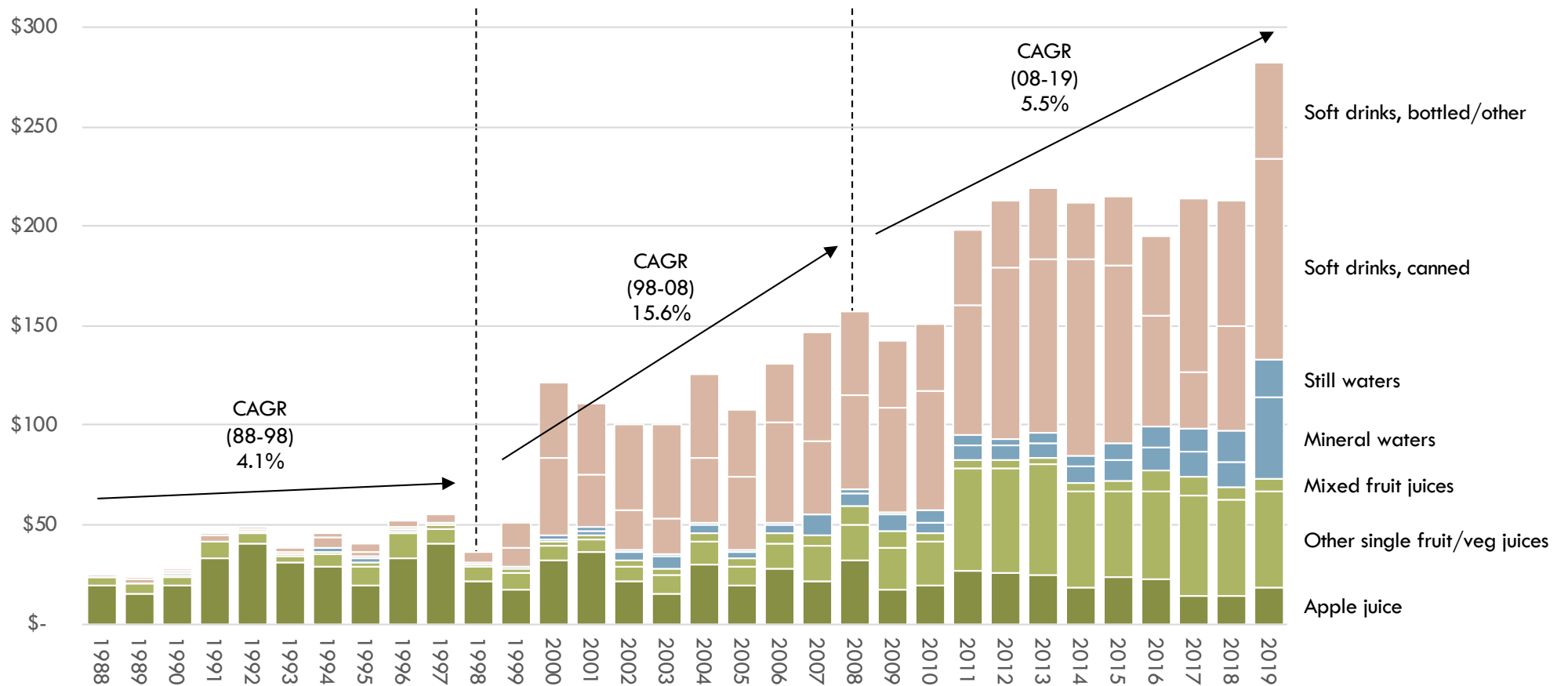
% of NZ\$; 1988-2019



New Zealand's non-alcoholic beverages (NAB) export growth is being driven by soft drinks and waters

NZ NON-ALCOHOLIC BEVERAGE EXPORT VALUE BY TYPE/SUB-TYPE

NZ\$; m; 1988-2019



New Zealand non-alcoholic beverages exports can be segmented into three key markets, each with different strategic priorities

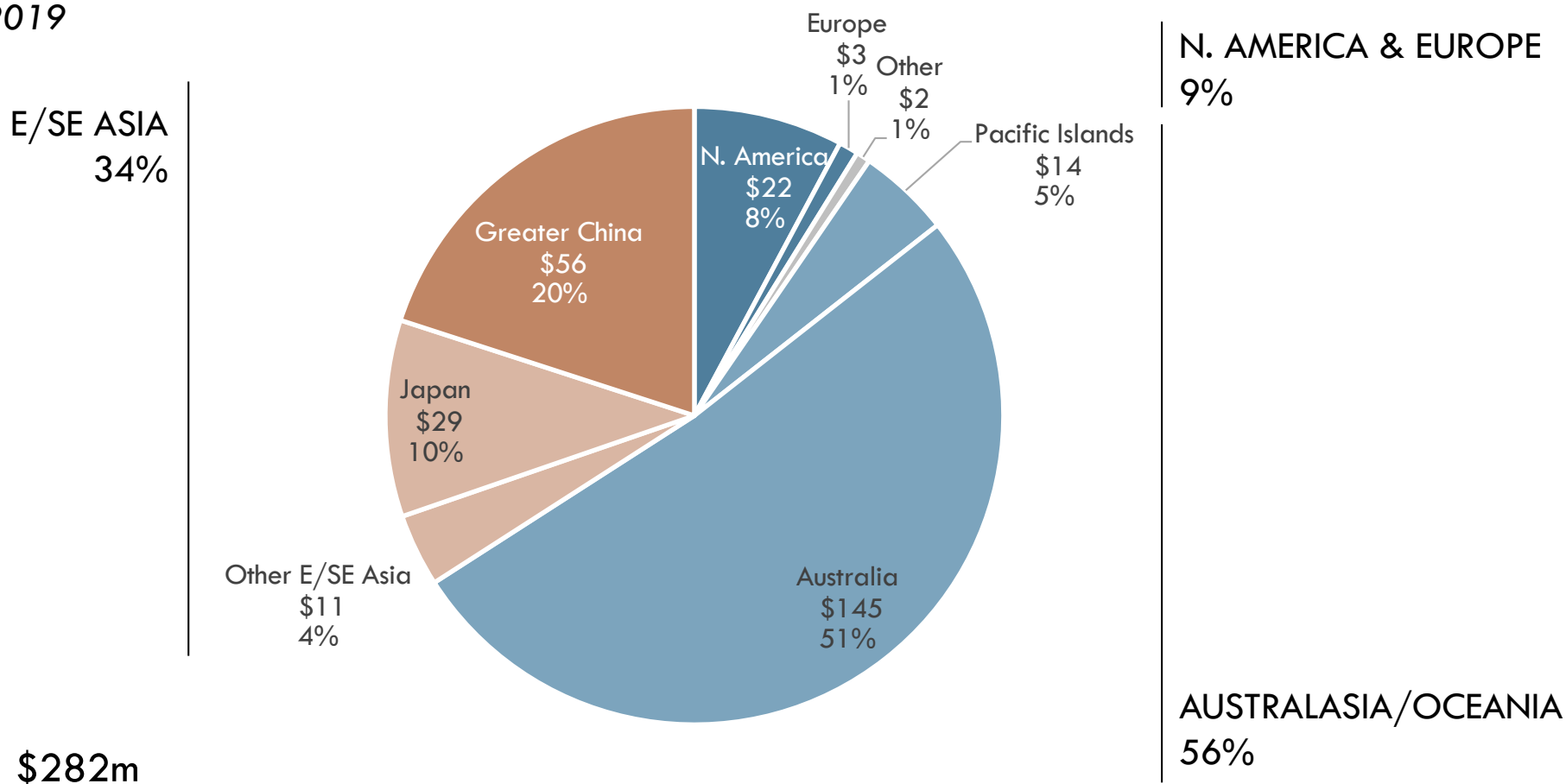


E/SE: East/South East; *Free Trade Agreements; Source: photo credit (purchased from stock photo providers)

In 2019, New Zealand's non-alcoholic beverages exports went predominantly to Australia (51%) and E/SE Asia (34%)

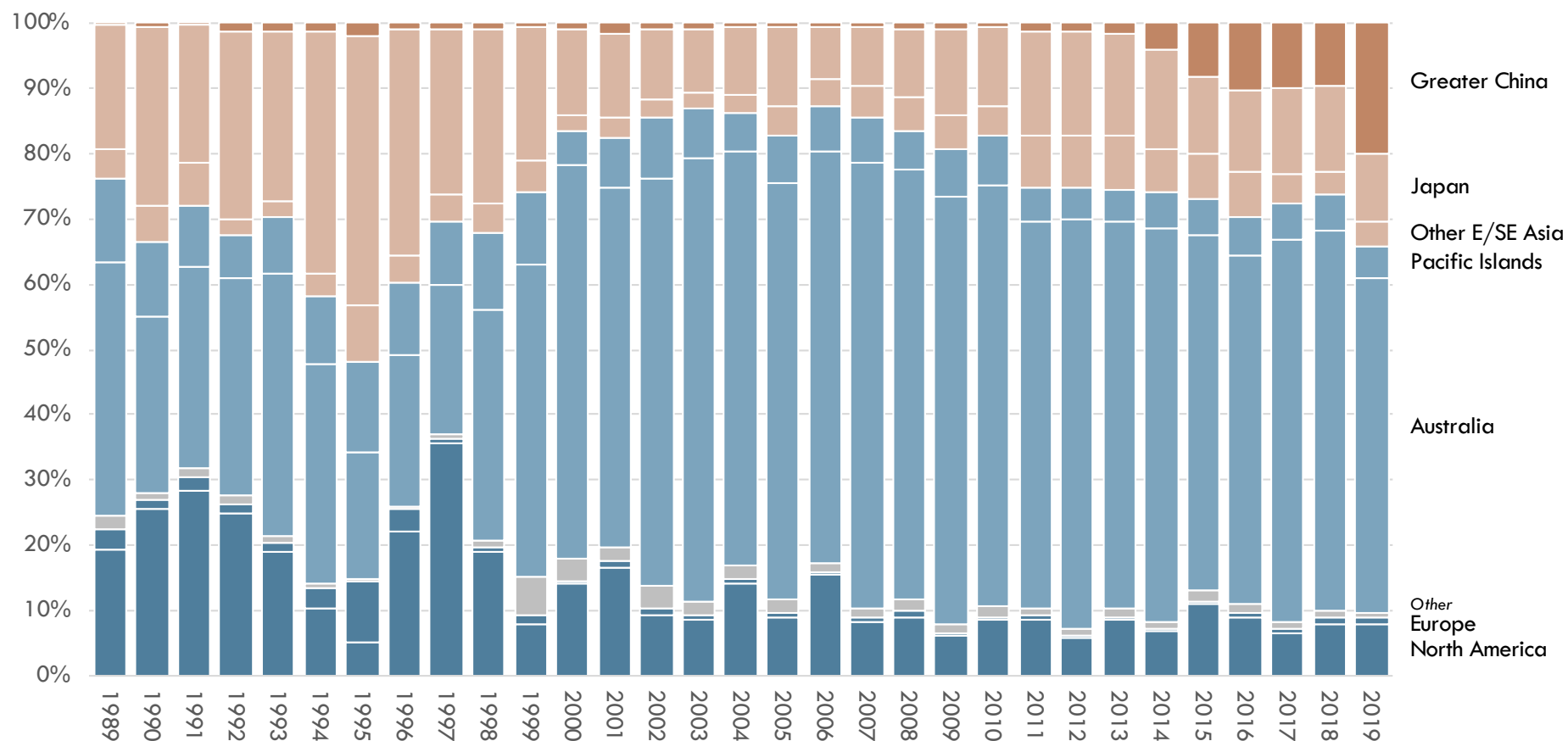
NEW ZEALAND NON-ALCOHOLIC BEVERAGE EXPORT VALUE BY DESTINATION

NZ\$; m; 2019



New Zealand's NAB export market mix has stayed relatively constant, though China has been growing over the past six years

SHARE OF NZ NON-ALCOHOLIC BEVERAGE EXPORT VALUE BY DESTINATION
 % of NZ\$; 1989-2019



Source: Statistics NZ; Coriolis classification and analysis

New Zealand's NAB export growth is currently being driven by Australia and China

NZ NON-ALCOHOLIC BEVERAGE EXPORT VALUE BY DESTINATION

NZ\$; m; 1989-2019

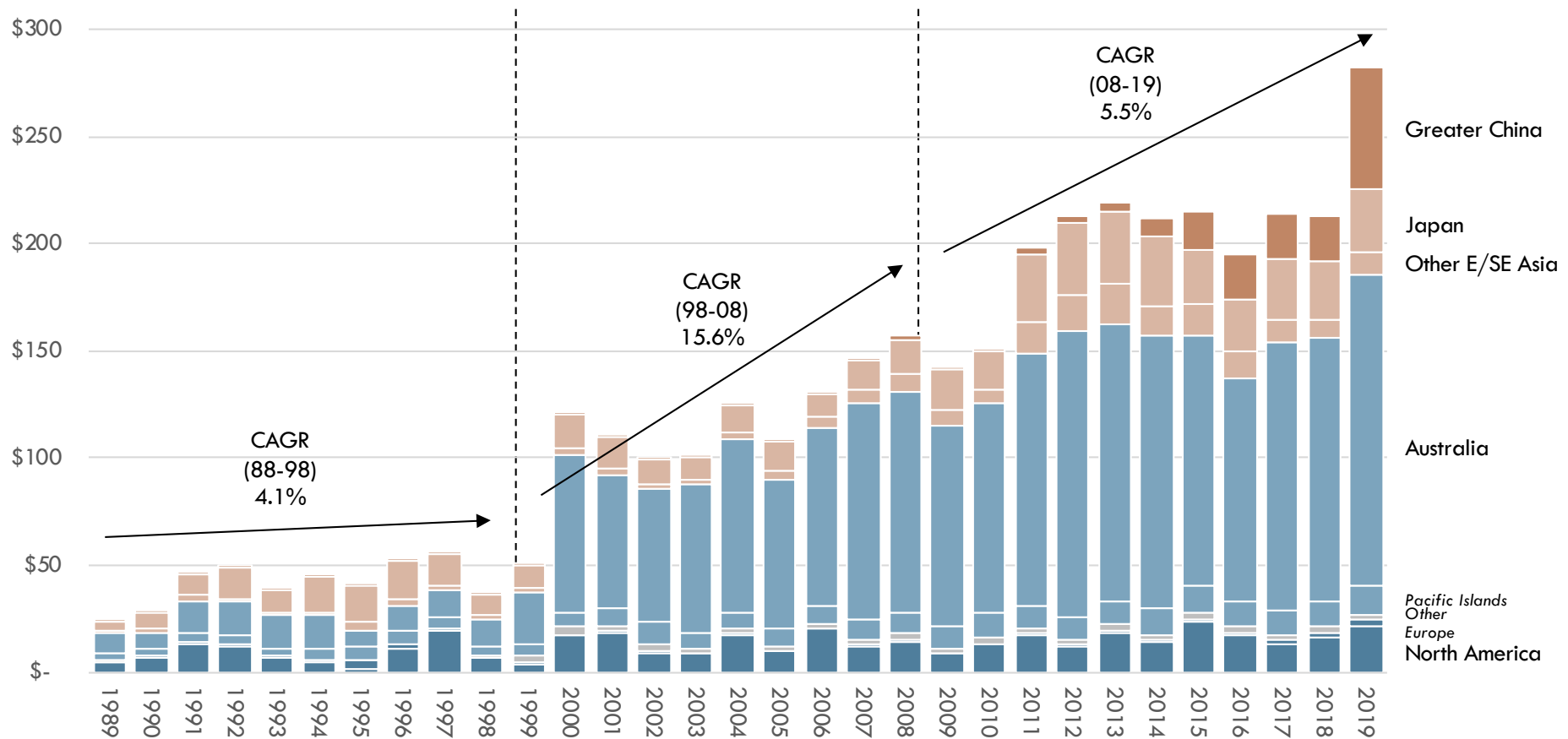


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New Zealand has a long history in fruit production



PIONEER ERA
(Apples 1819-1947; Kiwifruit 1906-1976)

Creating

- Apples and Pears first introduced to NZ in 1819 by Rev Samuel Marsden, who planted trees in Kerikeri, Bay of Islands. By 1835 the trees were flourishing, but yield was often poor due to diseases. 1899 the first trial shipment of apples and pears to the United Kingdom. The Orchard and Garden Pests Act passed in 1903 and the Diseases Act in 1908 led to increased production.
- Kiwifruit as a commercial crop were pioneered in New Zealand across the 20th Century. Key pioneer Hayward Wright developed the variety that now dominates global production.
- An extensive range of other new varieties were trialed and developed in New Zealand during this era.



MARKETING BOARD
(Apples 1948-2001; Kiwifruit 1977-2000)

Improving

- The apple industry was regulated by government under the Apple and Pear Marketing Act 1948, to create an orderly market and standardise product quality across processors. The Board acquired, exported and marketed New Zealand Pipfruit.
- In kiwifruit, an export marketing board was created in 1977; the organisation was restructured as Zespri in 2000.
- Formation of Hort Research by government (now Plant & Food Research).
- A number of other marketing boards existed, though most fruit and vegetables experience only limited market control.



INNOVATION ERA
(Apples 2001+; kiwifruit=Zespri)

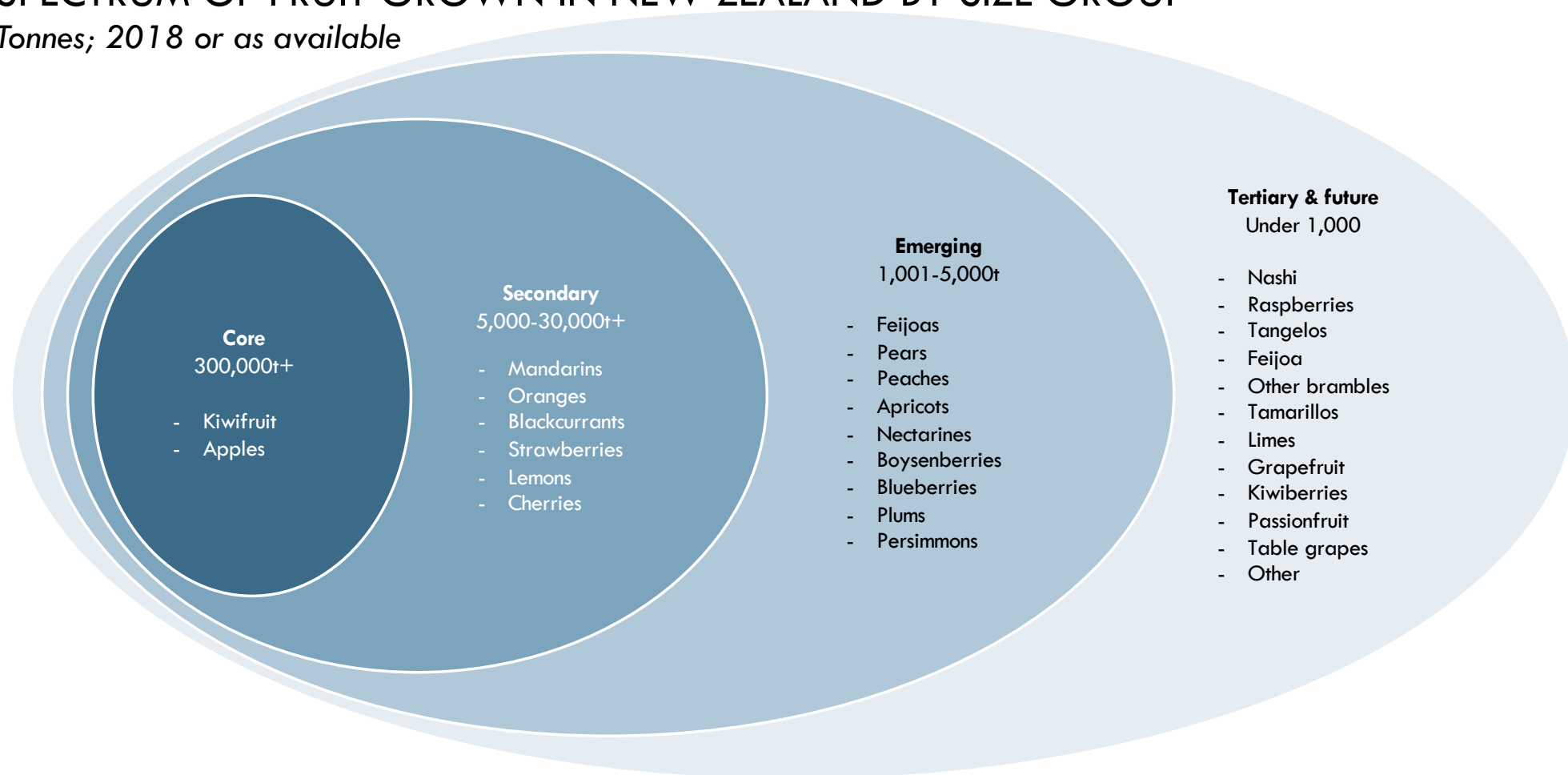
Innovating

- Since 2001 individual growers have been able to export and market their own fruit (excluding kiwifruit).
- Ongoing fruit developed and bred at Plant and Food Research (9 new apple cultivars since 1990); commercialised through joint venture company Prevar.
- Global investors begin investing in New Zealand produce production and processing.
- Range of innovative new products launched (e.g. Rockit miniature apple).

New Zealand produces a wide spectrum of fruit

SPECTRUM OF FRUIT GROWN IN NEW ZEALAND BY SIZE GROUP

Tonnes; 2018 or as available



New Zealand has both pioneered numerous new fruit species and developed a wide range of new varieties

EXAMPLES OF FRUIT PIONEERED OR DEVELOPED IN NZ

Select examples; 2020

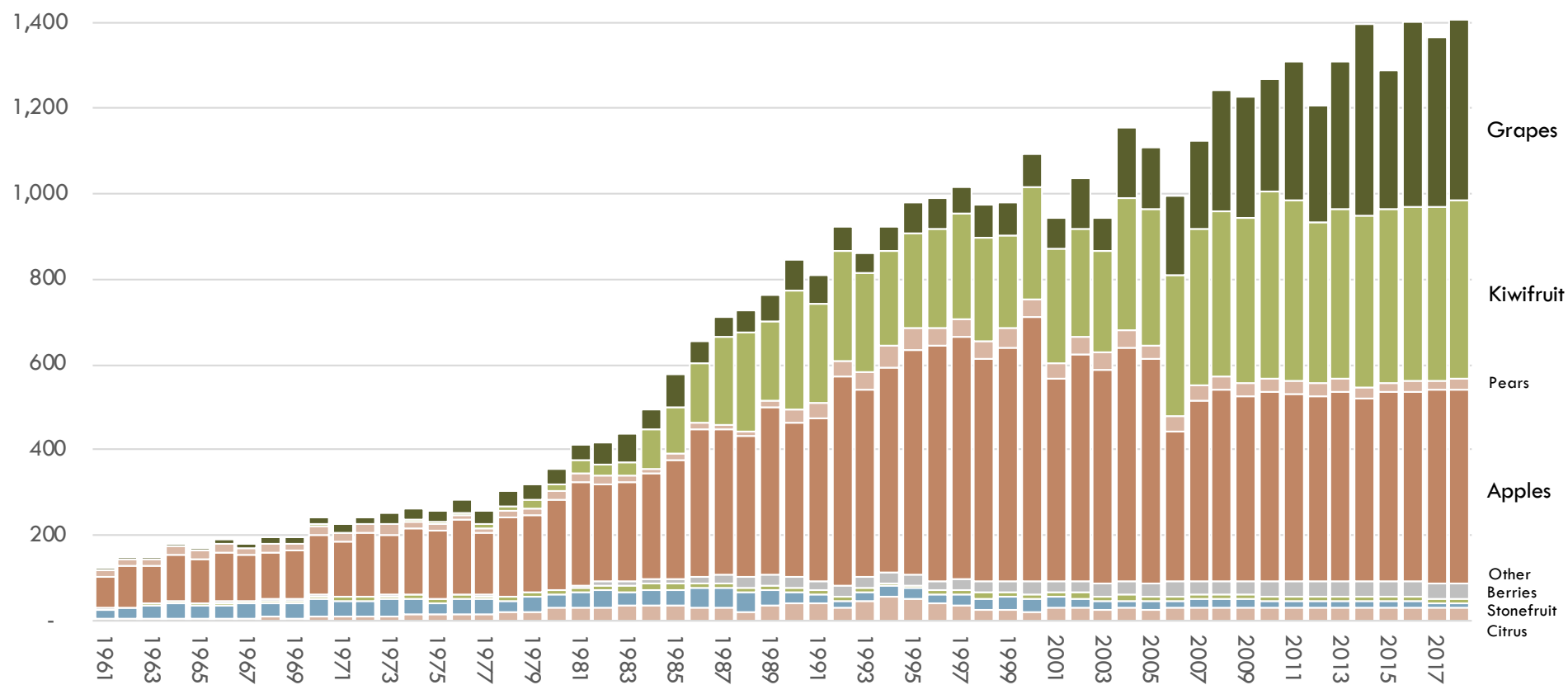
APPLES	KIWIFRUIT	OTHER FRUIT
Granny Smith* (major global)	Hayward (dominant global**)	Feijoa
Splendour	Bruno	Tamarillo
Gala	Alison	Passionfruit
Royal Gala (major global)	EnzaGreen	Kiwiberries
Braeburn (major global)	EnzaGold	Kiwano
Jazz	Zespri Gold	Blueberries (various cultivars)
Envy	Zespri Sungold	Blackcurrants (various cultivars)
Pacific Rose	Zespri SweetGreen	
Pacific Beauty	Zespri Red	
Pacific Queen	KiwiKiss	
Smitten		
Maxie		
Sweetie		

* Appeared in Australia but was developed/improved in New Zealand; ** Outside China; Source: Coriolis analysis

New Zealand has large and growing fruit production

NEW ZEALAND FRUIT PRODUCTION

Tonnes; 000; 1961-2018



Note: this report does not classify avocados, hops, olives and melons as fruit; Source: MAF/MPI; UN FAO FAOSTAT database; Plant & Food Fresh Facts; Coriolis analysis

New Zealand has a range of unique or signature ingredients and flavours suitable for use in beverages

GREEN KIWIFRUIT



BLACKCURRANTS



NZ APPLE VARIETIES



MANUKA HONEY



GOLD KIWIFRUIT



FEIJOA



KAWAKAWA



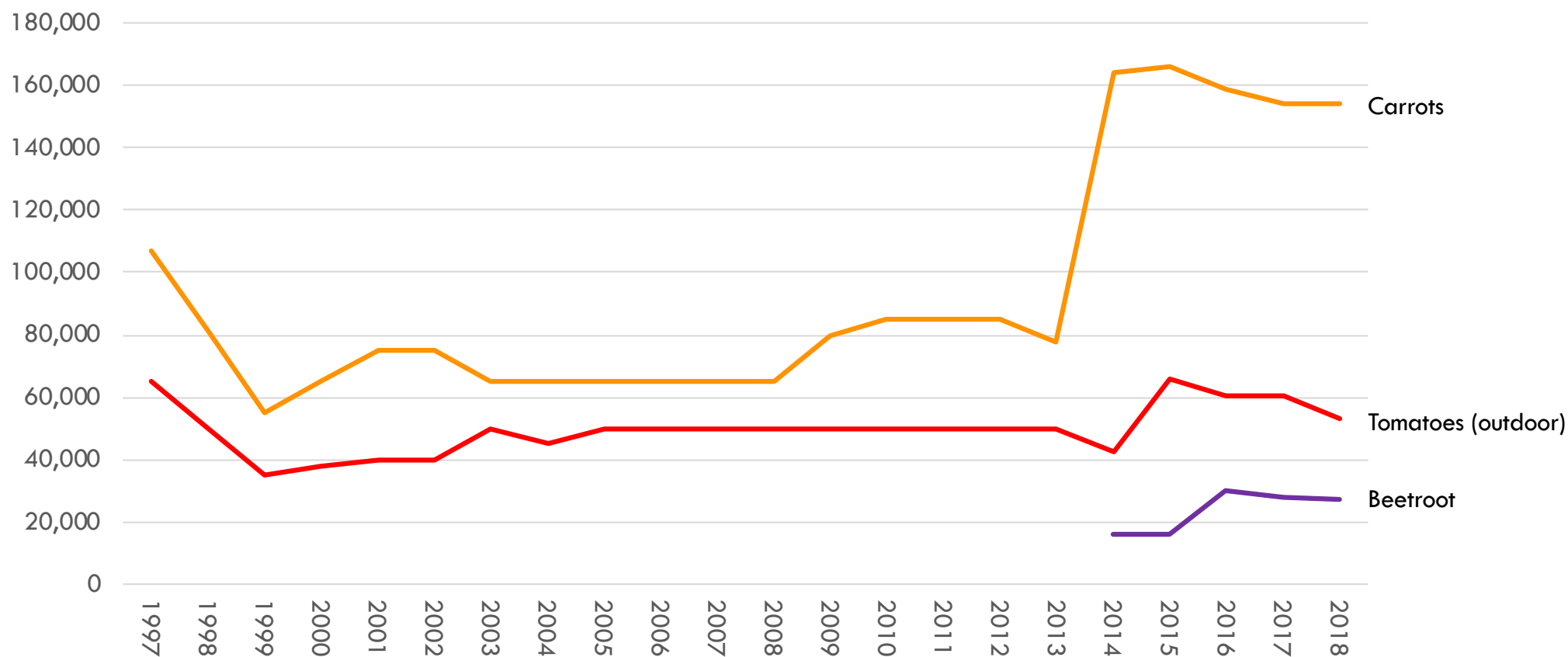
OTHER



New Zealand also produces a range of vegetables regularly used in juices

NEW ZEALAND PRODUCTION OF SELECT VEGETABLES USED IN JUICE

Tonnes; 1997-2018



New Zealand firms produce a wide range of everyday juices

SELECT EXAMPLES



Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis

New Zealand firms produce a wide range of premium juices

SELECT EXAMPLES

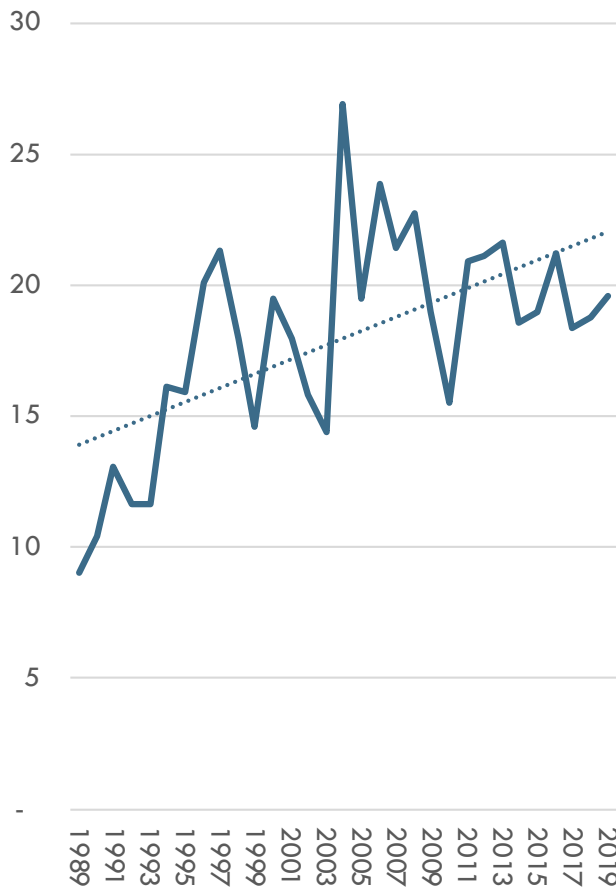


Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis

New Zealand juice exports are achieving relatively stable volumes (20m litres/year) and long term price growth

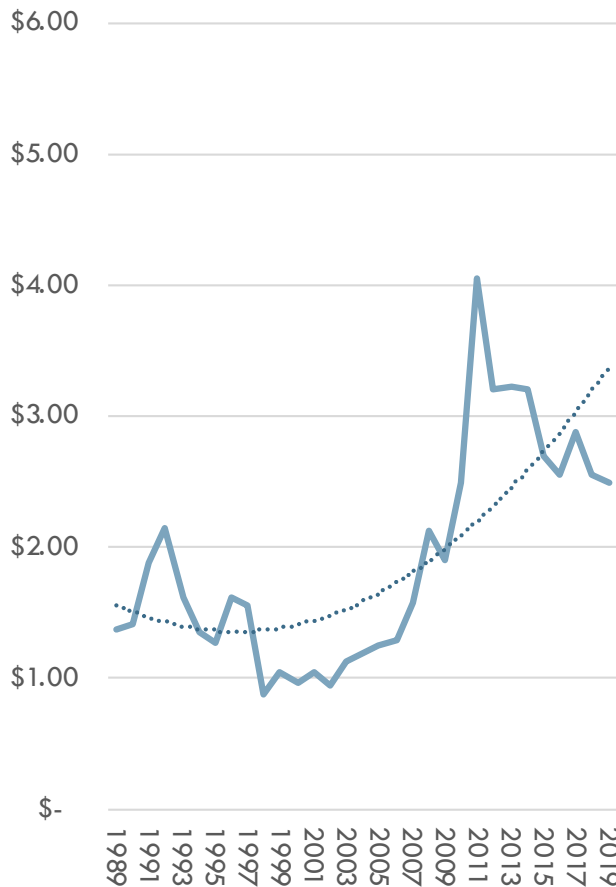
JUICE EXPORT VOLUME

Litres; m; 1989-2019



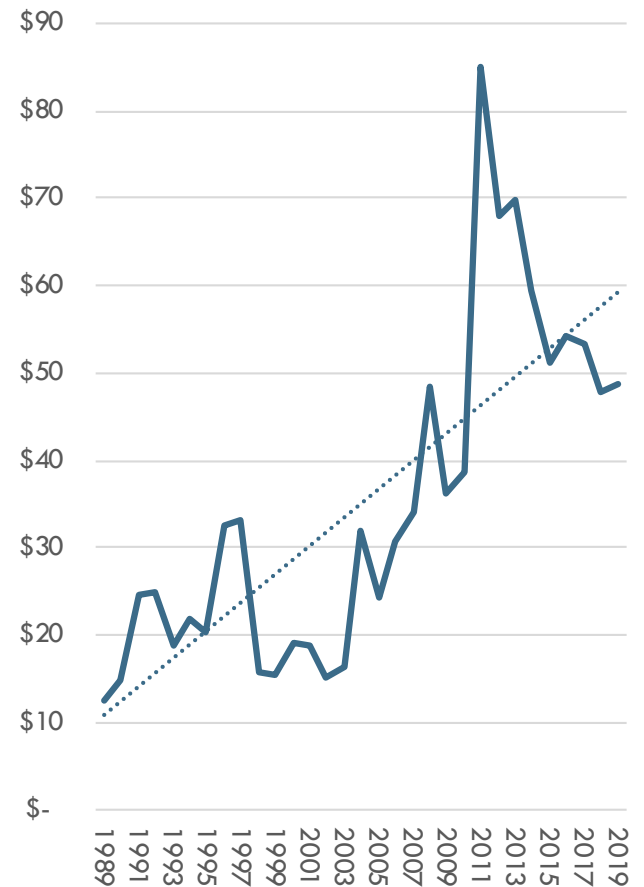
AVERAGE EXPORT PRICE

US\$/litre; 1989-2019



JUICE EXPORT VALUE

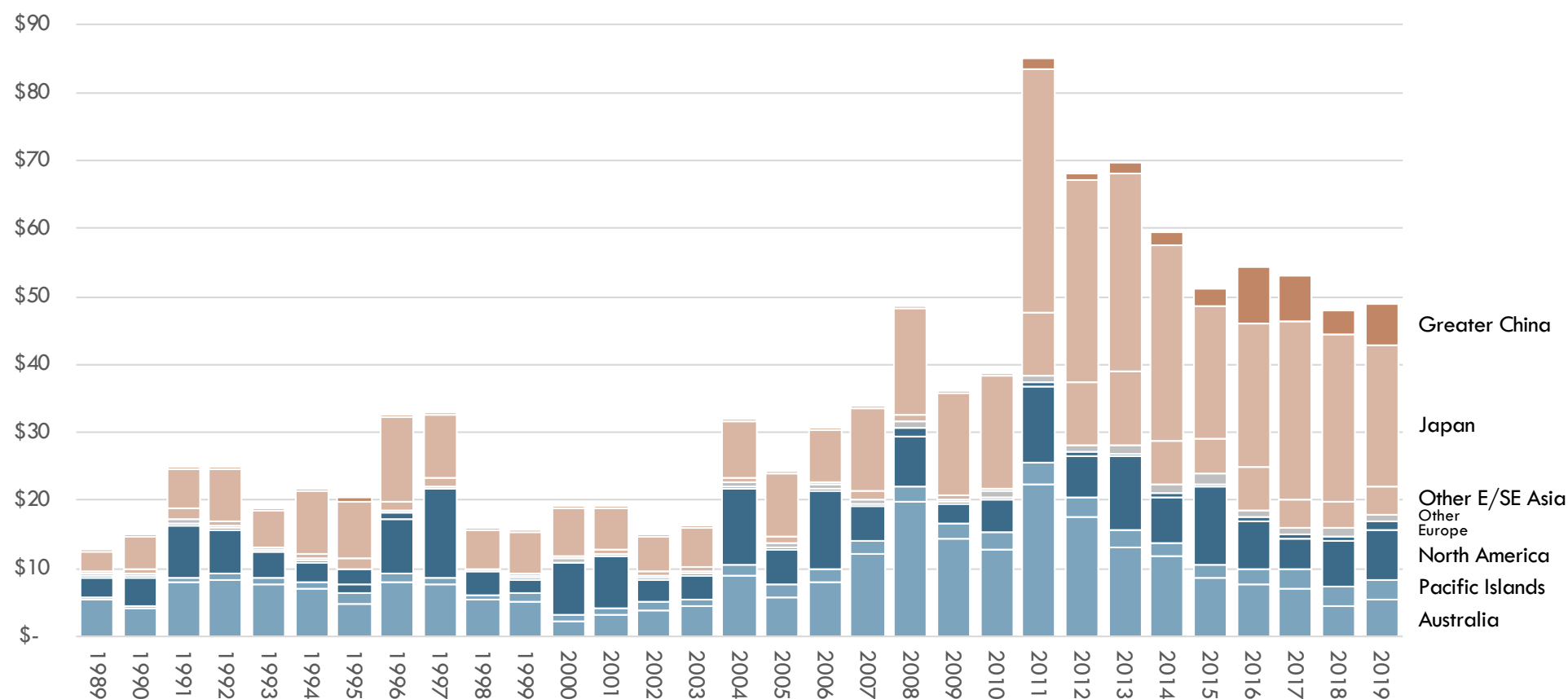
US\$; m; 1989-2019



New Zealand juice exports are shifting focus from Anglo-European regions to Asian markets

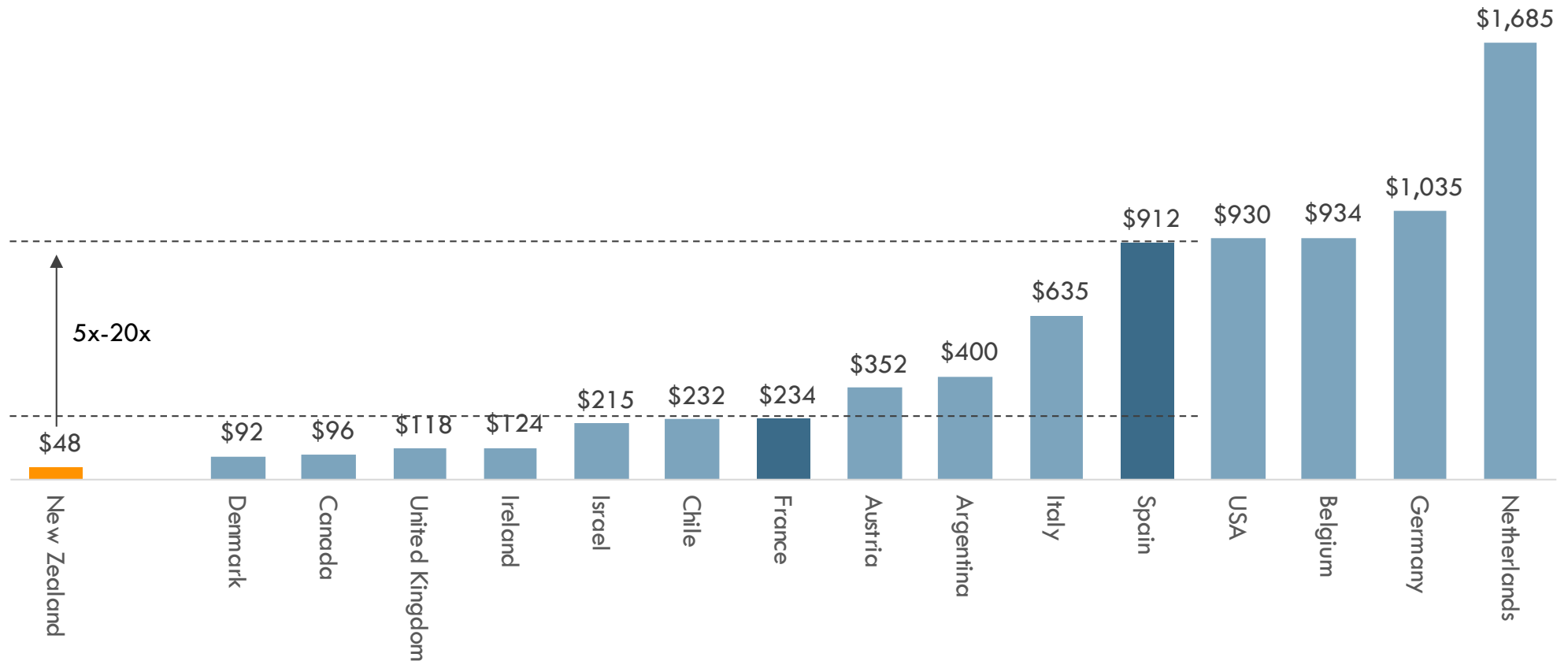
NEW ZEALAND JUICE EXPORT VALUE BY DESTINATION

US\$; m; 1989-2019



Temperate climate Anglo-European peers suggest that New Zealand could export five to twenty times more juice

JUICE EXPORT VALUE: NEW ZEALAND VS. SELECT CULTURAL/CLIMATIC PEERS
US\$; m; 2018



Note: uses 2018 as 2019 data not yet available at source for all countries listed; Source: UN Comtrade; Coriolis classification and analysis

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“New Zealand is singularly rich in springs of water that hold mineral salts in solution, and these are already noted for their valuable medicinal properties. Some of the acid baths of greatest repute, such as the “Priest's” Bath, at Rotorua, have nothing equal to them in use in any part of the world.

Both hot and cold springs are found, the former being, with few exceptions, confined to the districts of the North Island where volcanic forces have been active since the last Tertiary period, and are not yet altogether dormant. A few thermal springs are found to escape from the Upper Mesozoic rocks, in localities where the source of heat can only be attributed to chemical decomposition of bituminous matters and sulphides; and in a few instances warm waters spring from Paláozoic rock-formations in the Middle Island. The cold mineral springs have a wider distribution, but have only as yet been examined from comparatively few localities.”

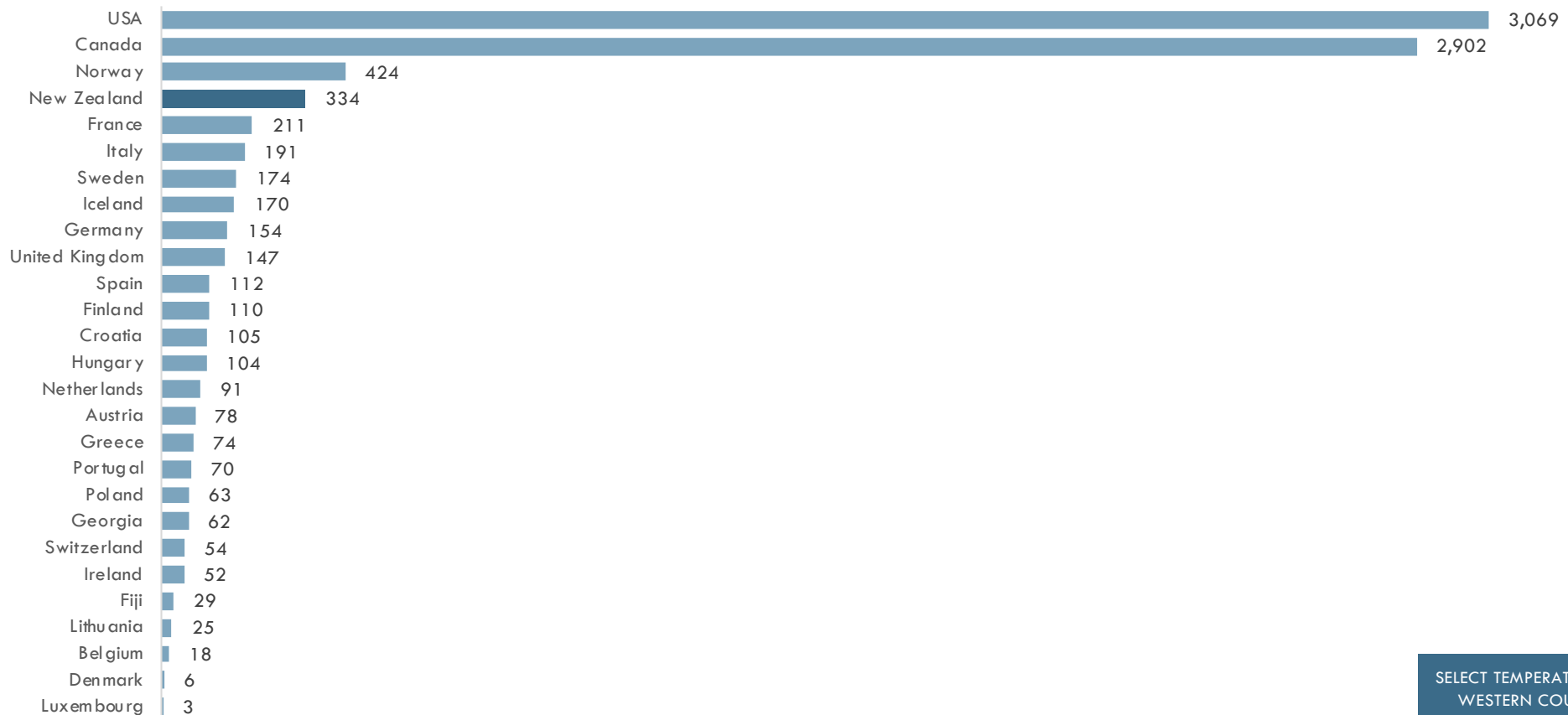
Sir James Hector, K.C.M.G., M.D.

The Mineral Waters Of New Zealand

The New Zealand Official Yearbook
1893

New Zealand has an abundant supply of quality natural water

TOTAL RENEWABLE WATER RESOURCES (RWR): NEW ZEALAND AND SELECT PEERS *Cubic kilometres; 2011*

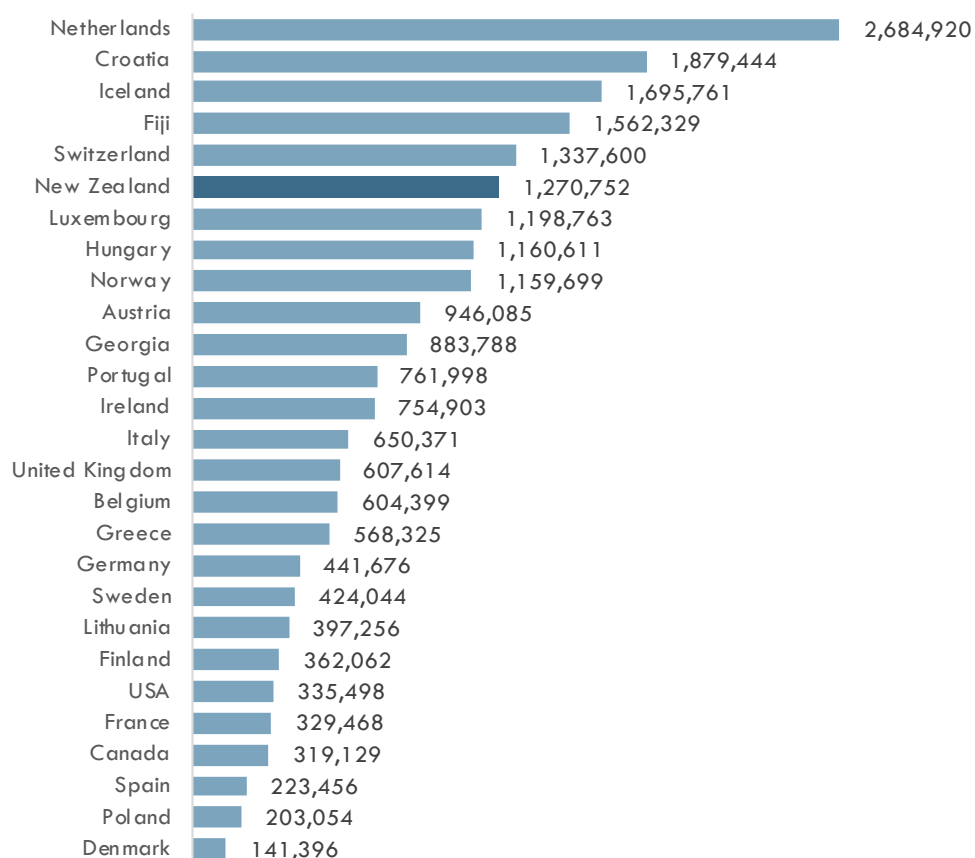


SELECT TEMPERATE CLIMATE
WESTERN COUNTRIES

New Zealand has a large renewable water resource (RWR) both on an area basis and on a per capita basis

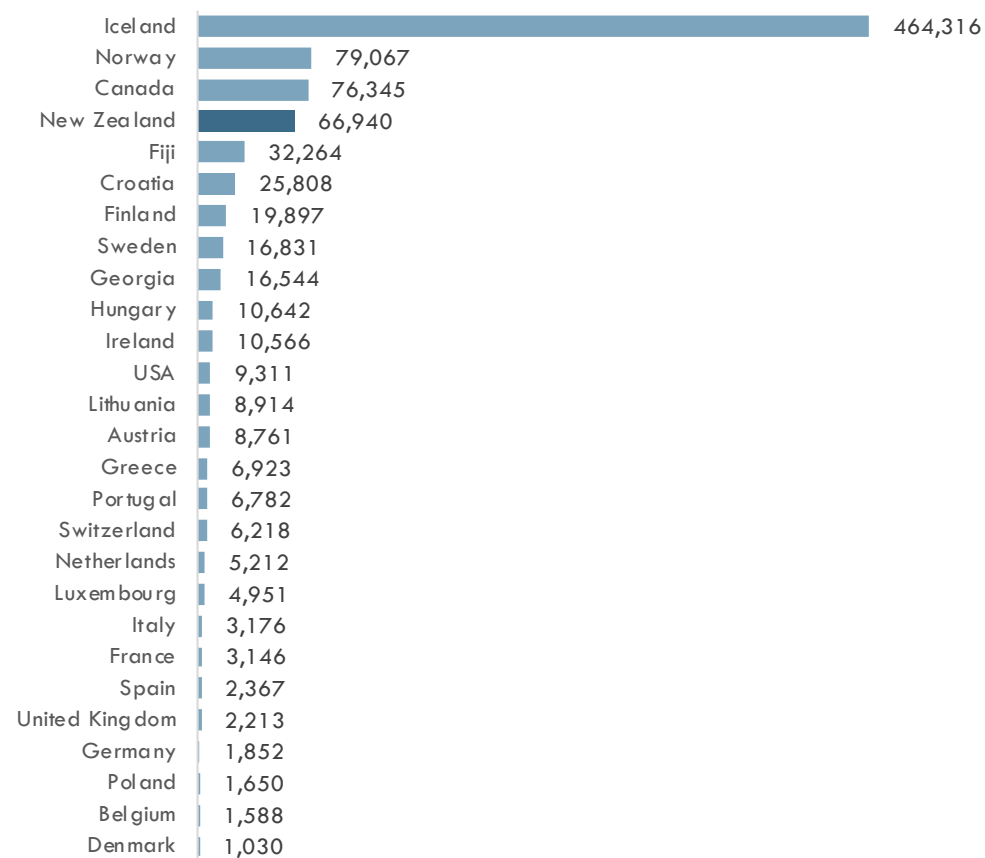
RWR PER SQUARE KILOMETRE

Cubic metres per square kilometre; 2011



RWR PER RESIDENT PERSON

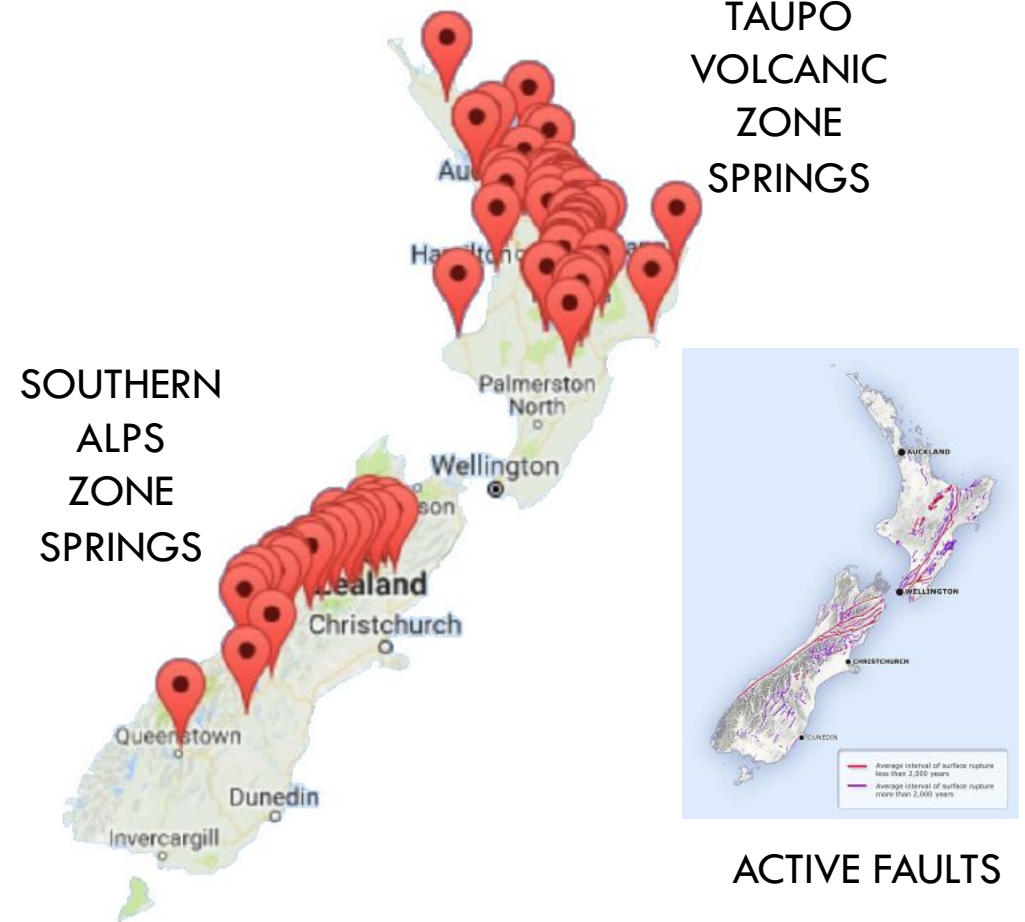
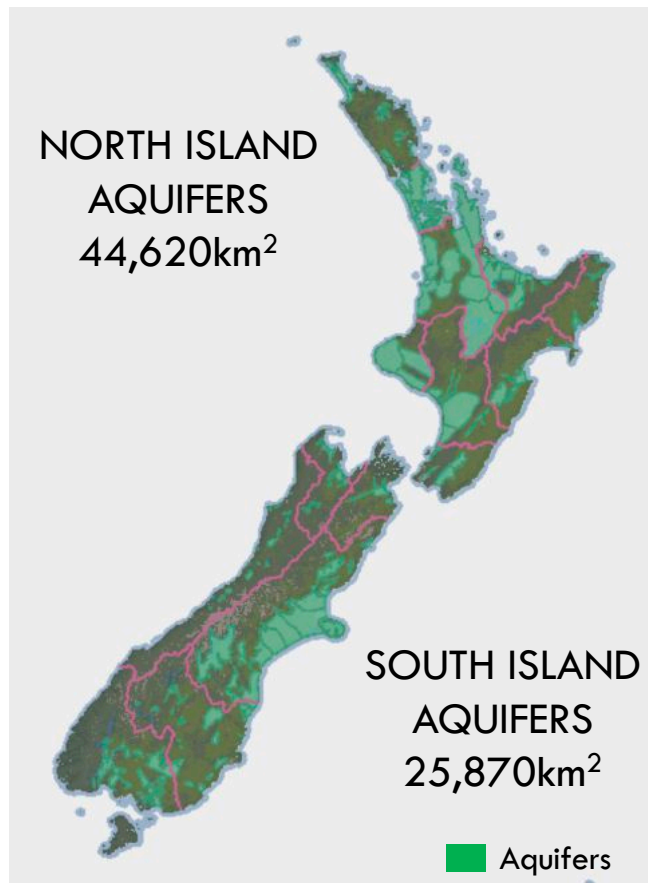
Cubic metres per person; 2011



New Zealand has vast areas of aquifers and thousands of springs located across New Zealand

LOCATIONS OF AQUIFERS & SPRINGS IN NEW ZEALAND

Presence; known sites



Note: 200 identified aquifers identified as at 2015; Source: stats.govt.nz; teara.govt.nz; nzhotpools.co.nz; Coriolis analysis

New Zealand firms produce a wide range of everyday waters

SELECT EXAMPLES



Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis

New Zealand firms produce a wide range of premium waters

SELECT EXAMPLES

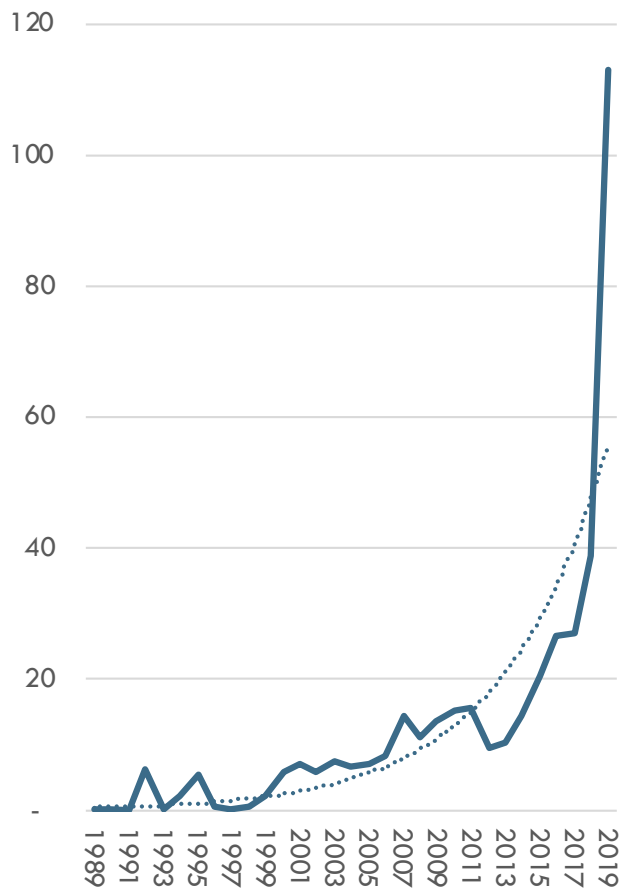


Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis

The total value of New Zealand water exports is growing strongly through growing volumes rather than price increases

WATER EXPORT VOLUME

Litres; m; 1989-2019



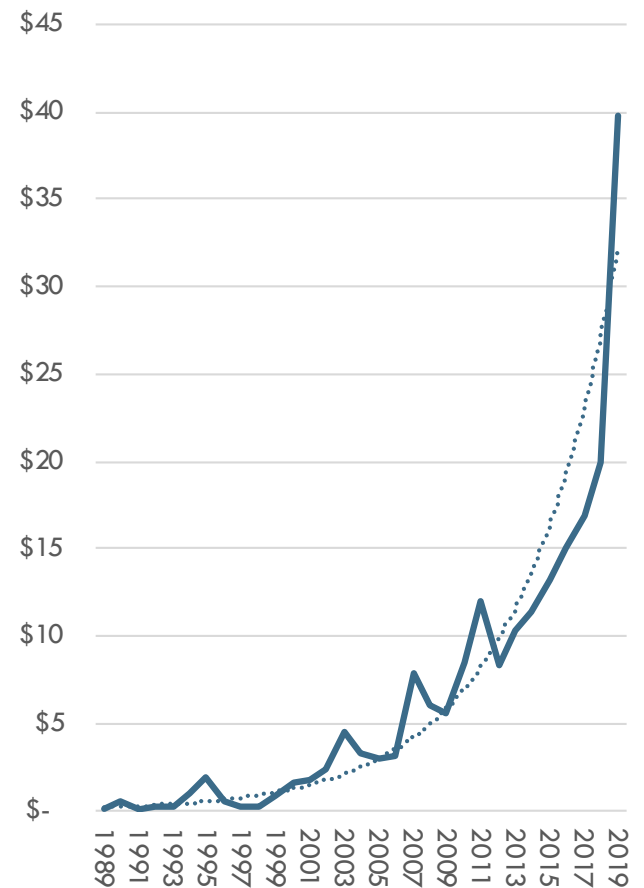
AVERAGE EXPORT PRICE

US\$/litre; 1989-2019



WATER EXPORT VALUE

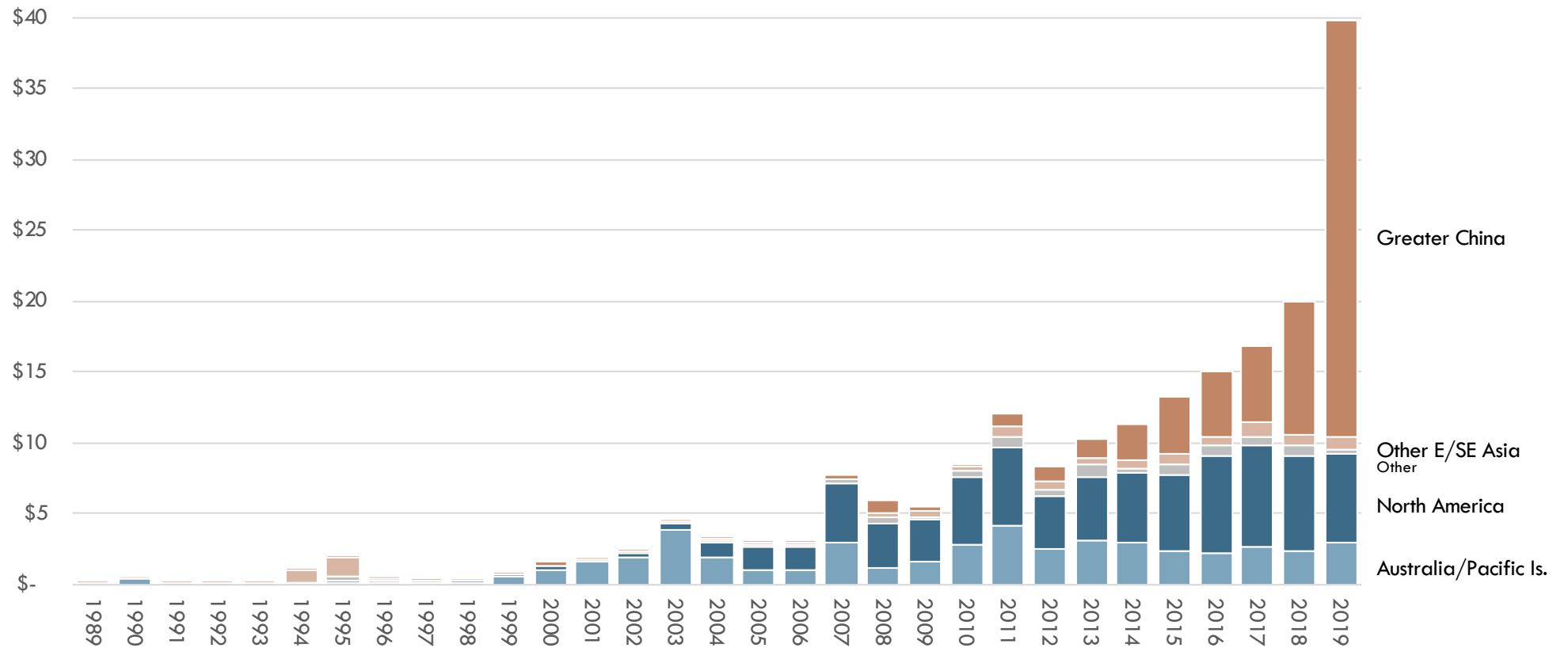
US\$; m; 1989-2019



Growth in demand for New Zealand water exports is coming from China

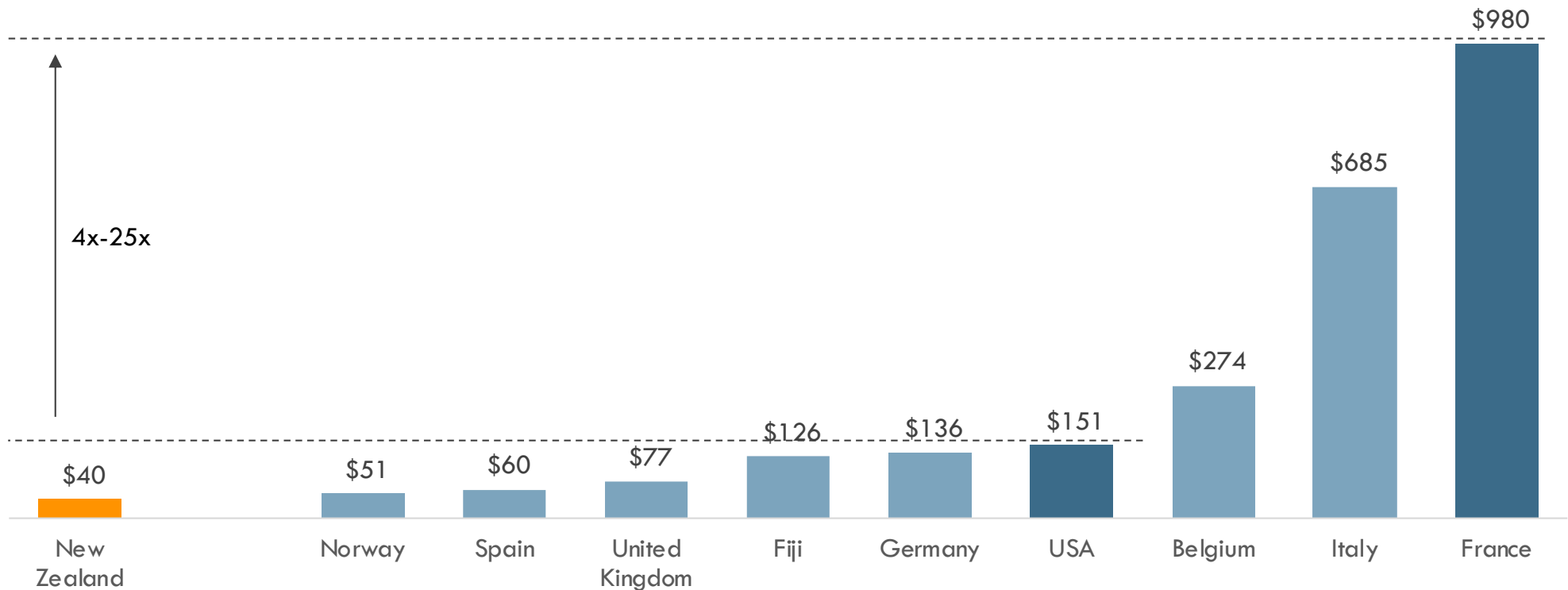
NEW ZEALAND WATER EXPORT VALUE BY DESTINATION

US\$; m; 1989-2019



Temperate climate Anglo-European peers suggest than New Zealand could export four to twenty five times more water

WATER EXPORT VALUE: NEW ZEALAND VS. SELECT CULTURAL/CLIMATIC PEERS
US\$; m; 2018 or 2019 as available

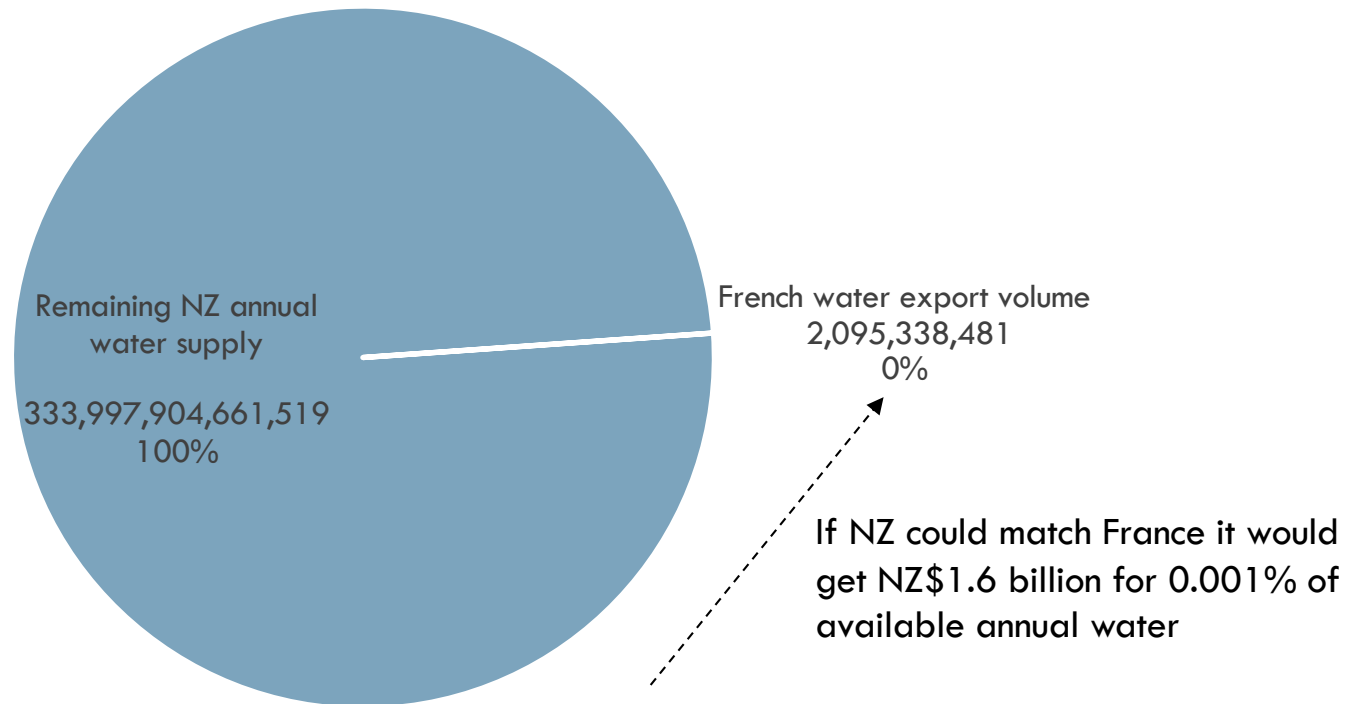


Note: uses 2018 or 2019 as data is not yet available at source for all countries listed; Source: UN Comtrade; Coriolis classification and analysis

If New Zealand exported as much water as France (global #1 by value) this would represent an infinitesimal share of annual water

WHAT IF NEW ZEALAND EXPORTED AS MUCH WATER AS FRANCE?

Hypothetical; litres; share of litres; 2020



TOTAL = 334,000,000,000,000 litres annually

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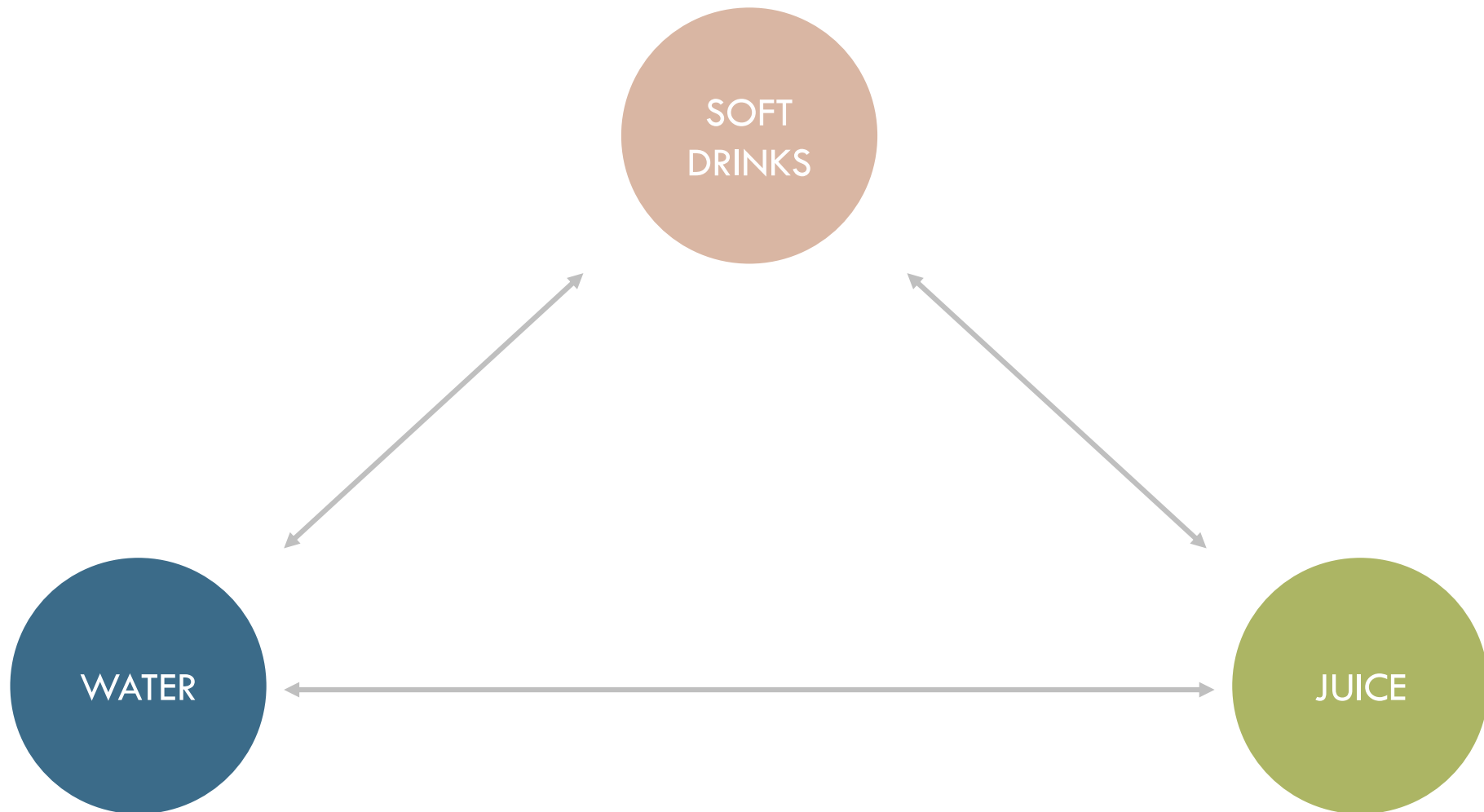
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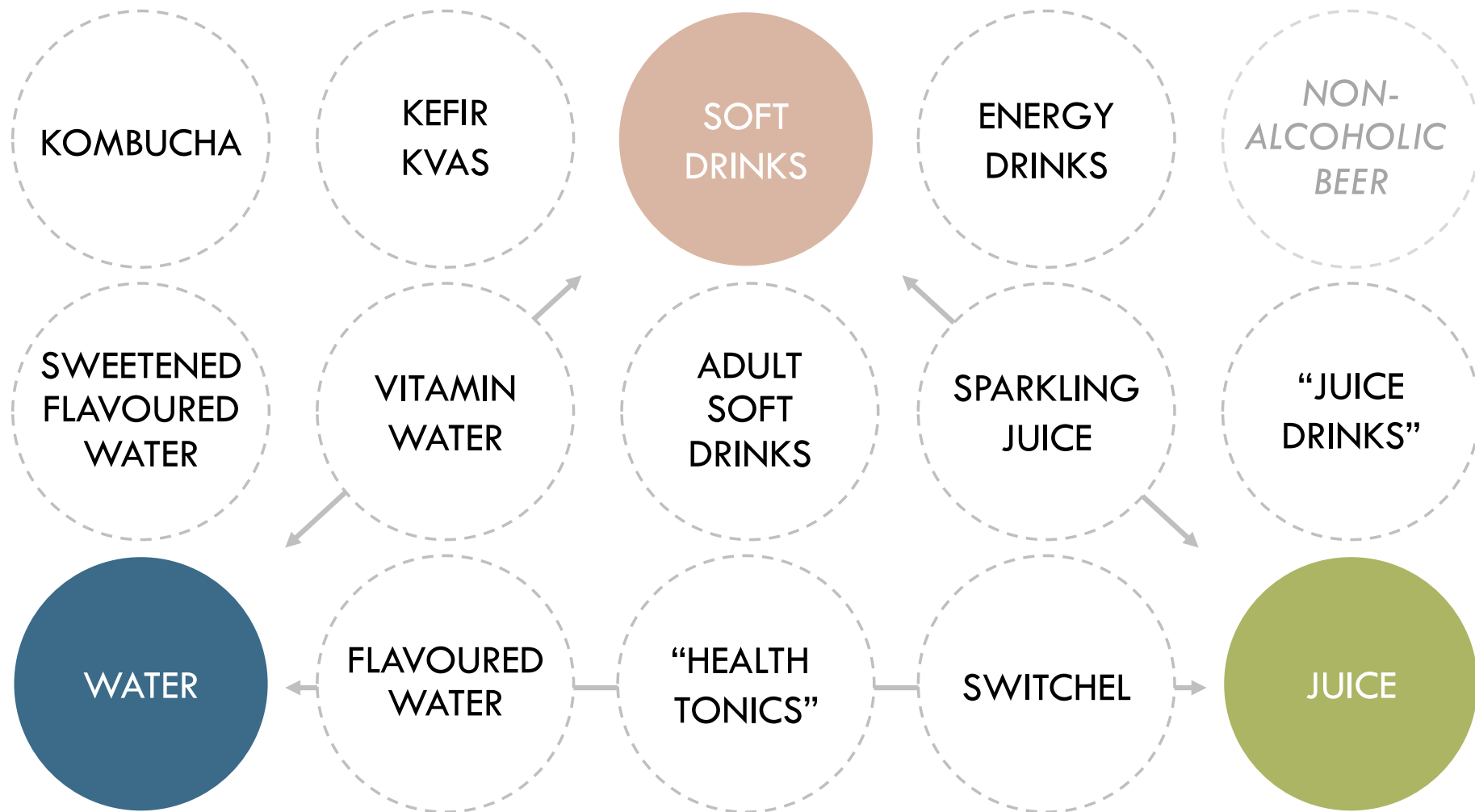
4. Soft Drinks

Appendices

Non-alcoholic beverages could historically be segmented into three major types: juice, soft drinks and water



However, this clear historical segmentation has broken down and blurred through constant new product innovation



From a trade point-of-view, most of these new products are defined as “soft drinks”

HS Code	Short	Detailed
2009	Juice	Fruit juices (including grape must) and vegetable juices, not fortified with vitamins or minerals, unfermented and not containing added spirit, whether or not containing added sugar or other sweetening matter
2201	Water	Waters, including natural or artificial mineral waters and aerated waters, not containing added sugar or other sweetening matter nor flavoured; ice and snow
2202	Soft Drinks	Waters, including mineral waters and aerated waters, containing added sugar or other sweetening matter or flavoured, and other non-alcoholic beverages (not including fruit or vegetable juices of heading 2009)

What are soft drinks? Soft drinks are effectively water, sweetener and flavourings



CARBONATED WATER: 7 oz
SYRUP: 1 oz per bottle

SYRUP FORMULATION (Make 5 gal syrup)

Water: 2.5 gal

Sugar: 30 lbs.

Lime juice: 1 quart (or replaced with citric acid/sodium citrate)

Fluid extract of Coca: 3 drams USP

Citric acid: 3 oz

Caffeine citrate: 1 oz

Vanilla extract: 1 oz

Caramel: 1.5 oz or more for color

Flavouring (The "secret" 7X formulation): 2.5 oz (to 5 gals syrup)

"7X" FLAVOURING FORMULATION

Alcohol: 8 oz

Orange oil: 20 drops

Lemon oil: 30 drops

Nutmeg oil: 10 drops

Coriander oil: 5 drops

Neroli oil: 10 drops

Cinnamon (Cassia) oil: 10 drops

HISTORICAL FORMULATION
NOT CURRENT RECIPE

Soft drinks are typically segmented by flavour

EXAMPLE: SOFT DRINK RANGE OF KARMA COLA & FOXTON FIZZ

Select examples from range; 2020



Once a strong brand is developed, product and line extensions can be used to extend reach and increase shelf presence

Developed by the New Zealand Apple & Pear Marketing Board and launched in August 1997*



New Packaging



Multipack



Sugar Free



New Sugar Free Flavours



New Flavours



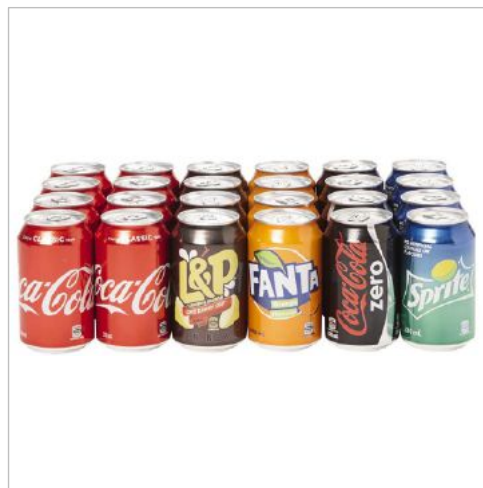
New Categories



* At the time V was launched Frucor Beverage was a subsidiary of the Apple and Pear Marketing Board. Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis

New Zealand firms produce a wide range of “classic” soft drinks

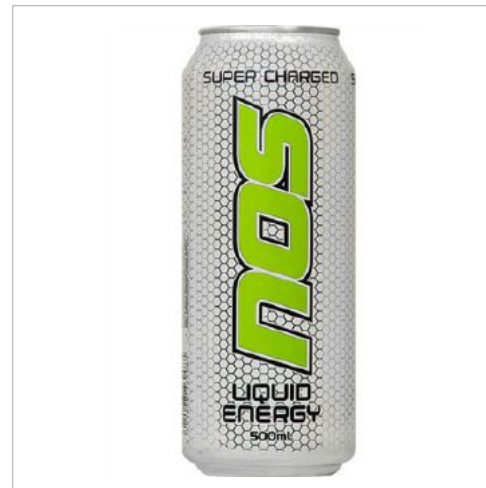
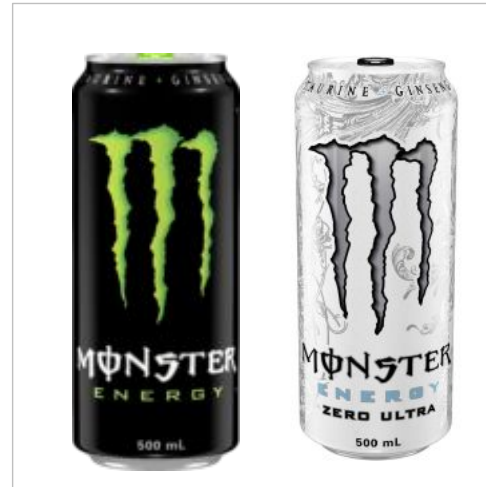
SELECT EXAMPLES



Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis

New Zealand firms produce a wide range of energy drinks

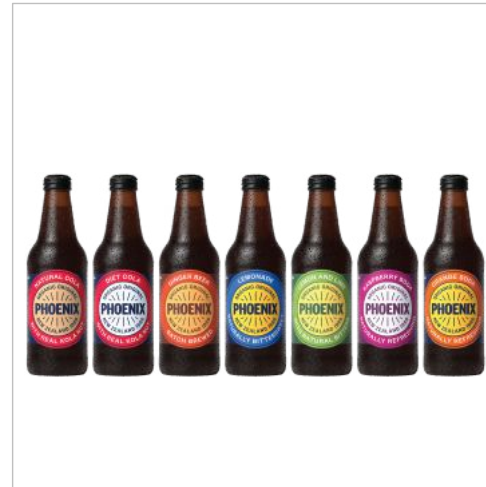
SELECT EXAMPLES



Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis

New Zealand firms produce a wide range of premium soft drinks and mixers

SELECT EXAMPLES



Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis

As an example, Lion has launched two adult soft drink brands



Ginger beer has attracted significant attention

SELECT EXAMPLES



Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis

New Zealand firms produce a wide range of sparkling water/juice added

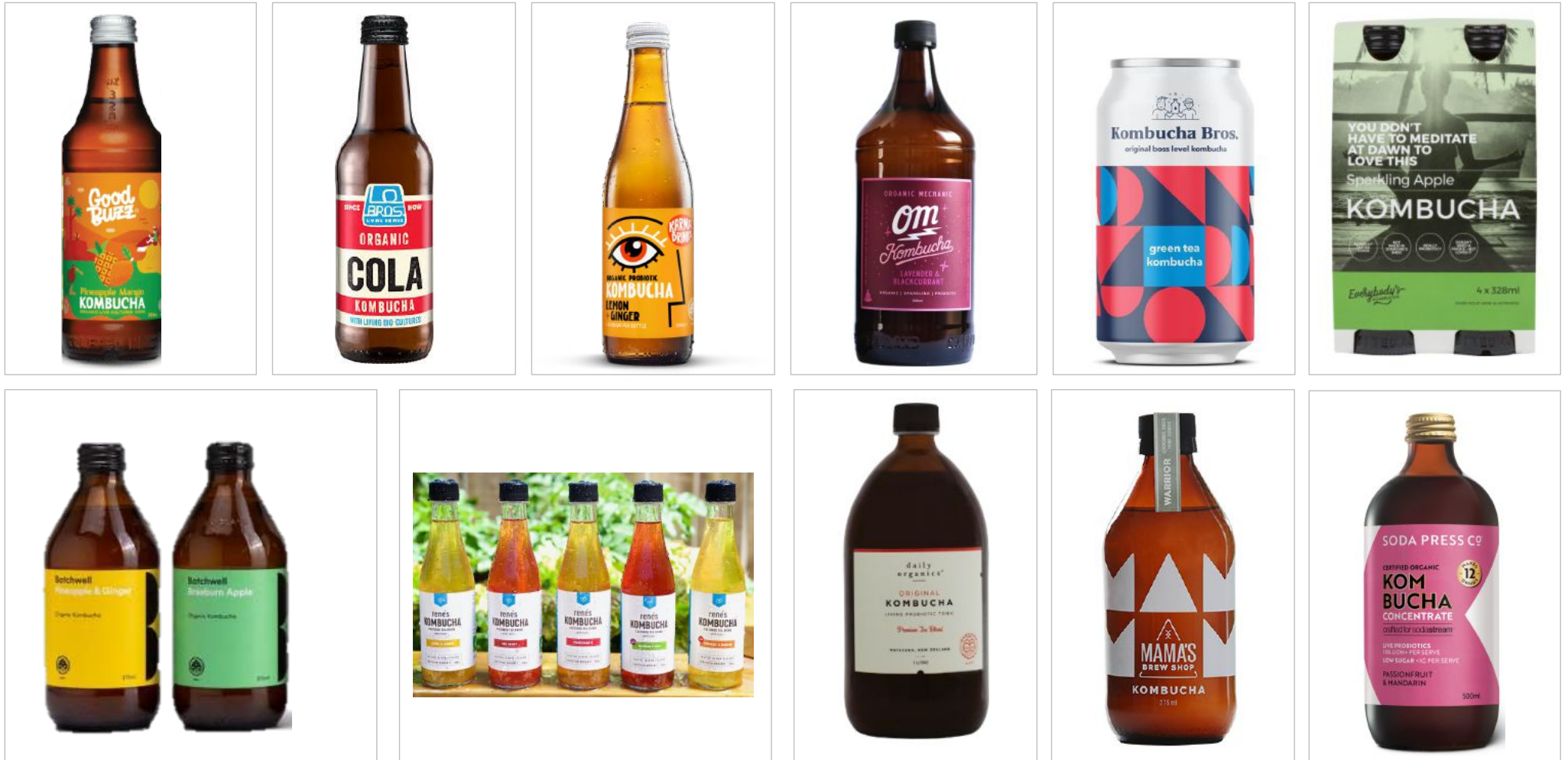
SELECT EXAMPLES



Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis

Kombucha has experienced strong growth

SELECT EXAMPLES



Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); supplied; Coriolis analysis

Kefir water, Kvas and Switchel are all emerging trends

KEFIR WATER/KVAS



SWITCHEL



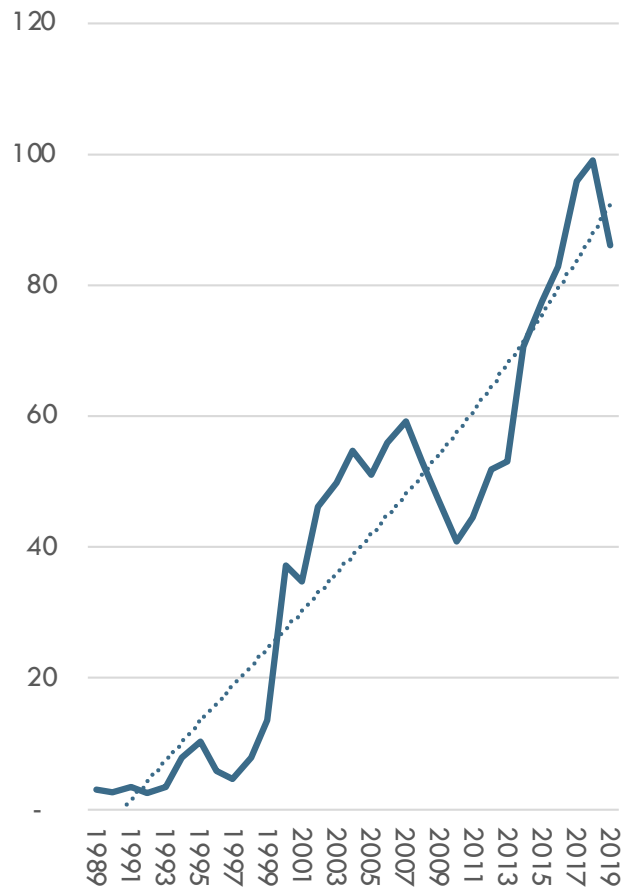
Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis

There is also an emerging overlap with nutraceuticals and “functional beverages”

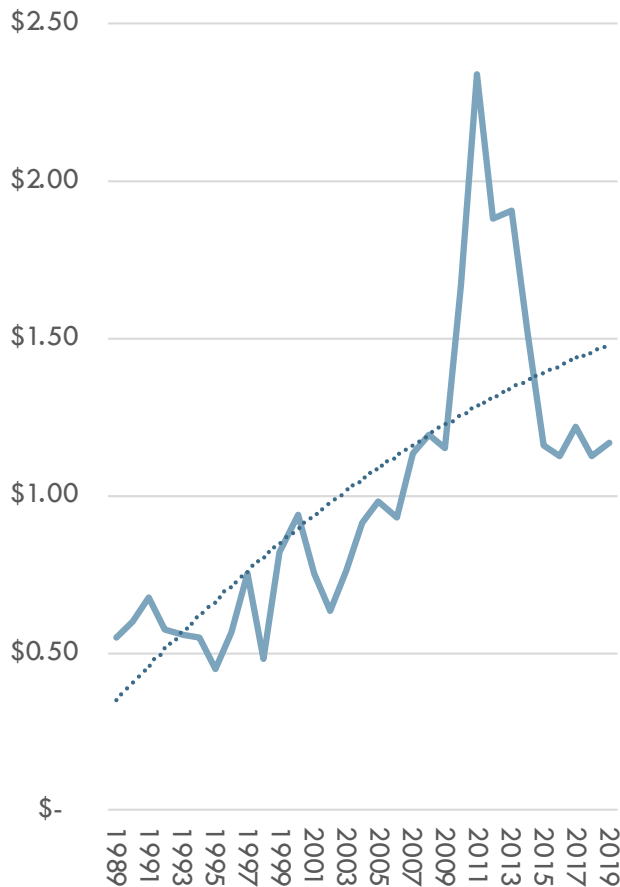


The value of New Zealand soft drink exports is growing based on solid volume growth and long term price growth

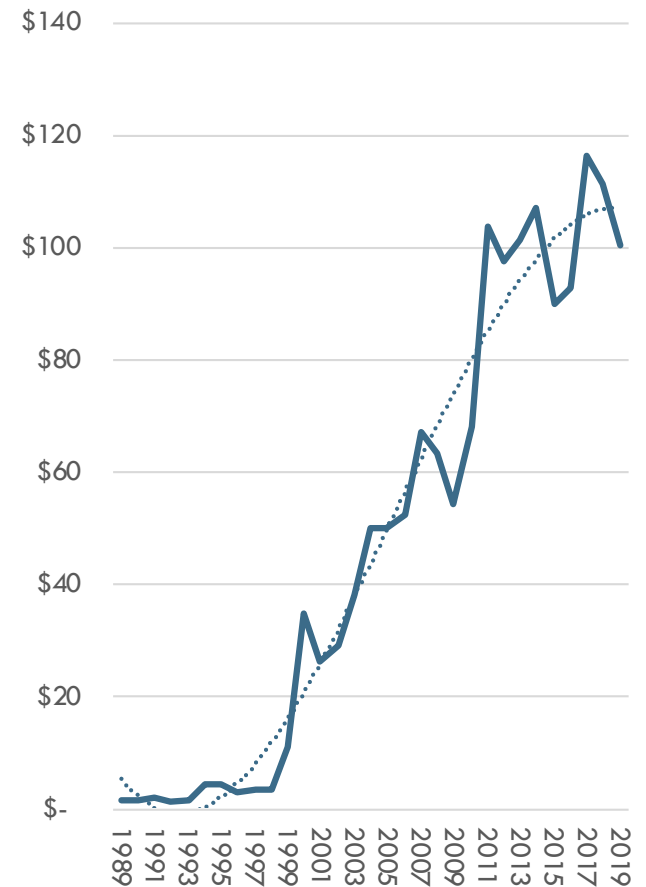
SOFT DRINK EXPORT VOL.
Litres; m; 1989-2019



AVERAGE EXPORT PRICE
US\$/litre; 1989-2019



SOFT DRINK EXPORT VALUE
US\$; m; 1989-2019

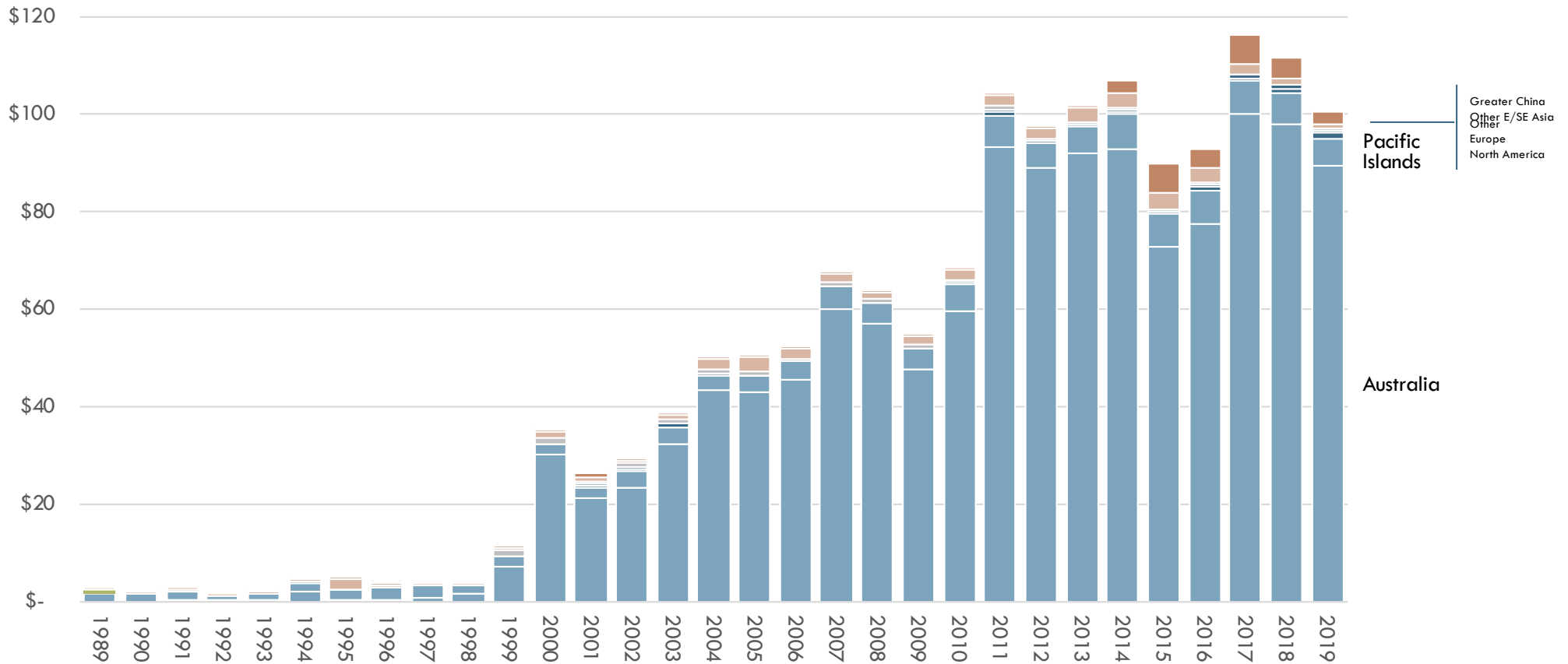


Source: UN Comtrade; Coriolis classification and analysis

New Zealand soft drink exports currently go predominantly to regional markets (Australia and the Pacific Islands)

NEW ZEALAND SOFT DRINK EXPORT VALUE BY DESTINATION

US\$; m; 1989-2019

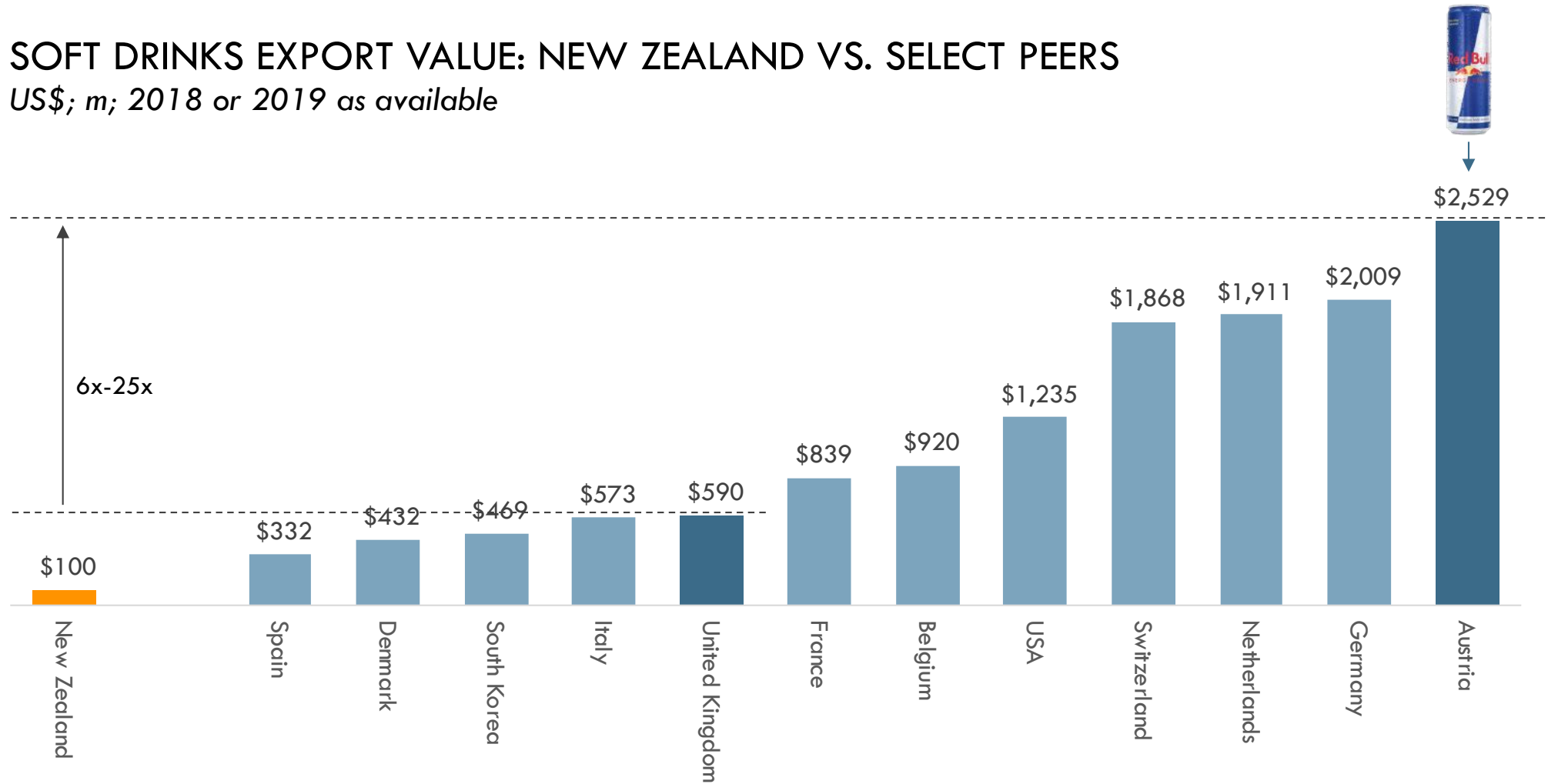


Source: UN Comtrade; Coriolis classification and analysis

A wide range of peers suggest that New Zealand could export more “soft drinks”

SOFT DRINKS EXPORT VALUE: NEW ZEALAND VS. SELECT PEERS

US\$; m; 2018 or 2019 as available



Note: uses 2018 as 2019 data not yet available at source for all countries listed; Source: UN Comtrade; Coriolis classification and analysis

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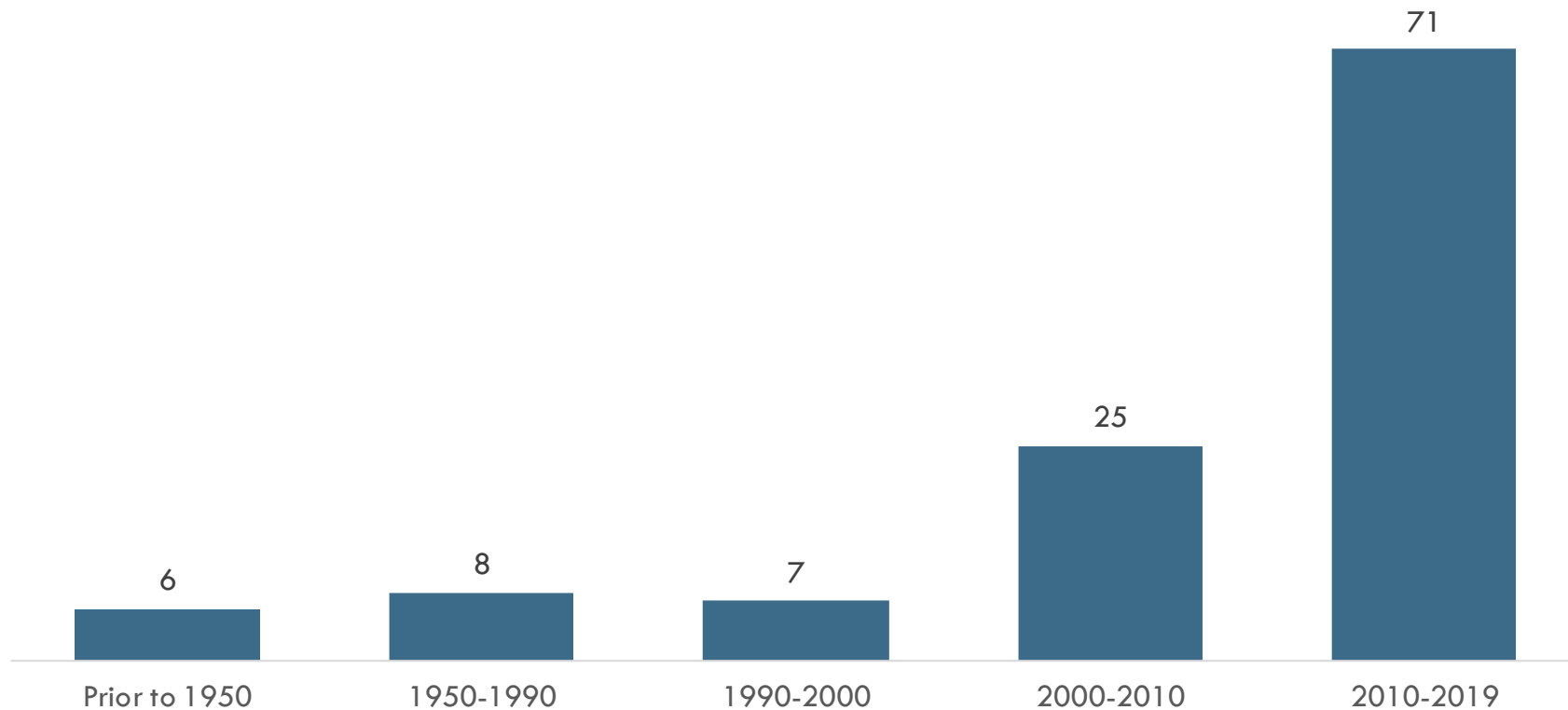
6. Firm Profiles

Appendices

Since 2000, New Zealand has experience an explosion in new beverage firm formation

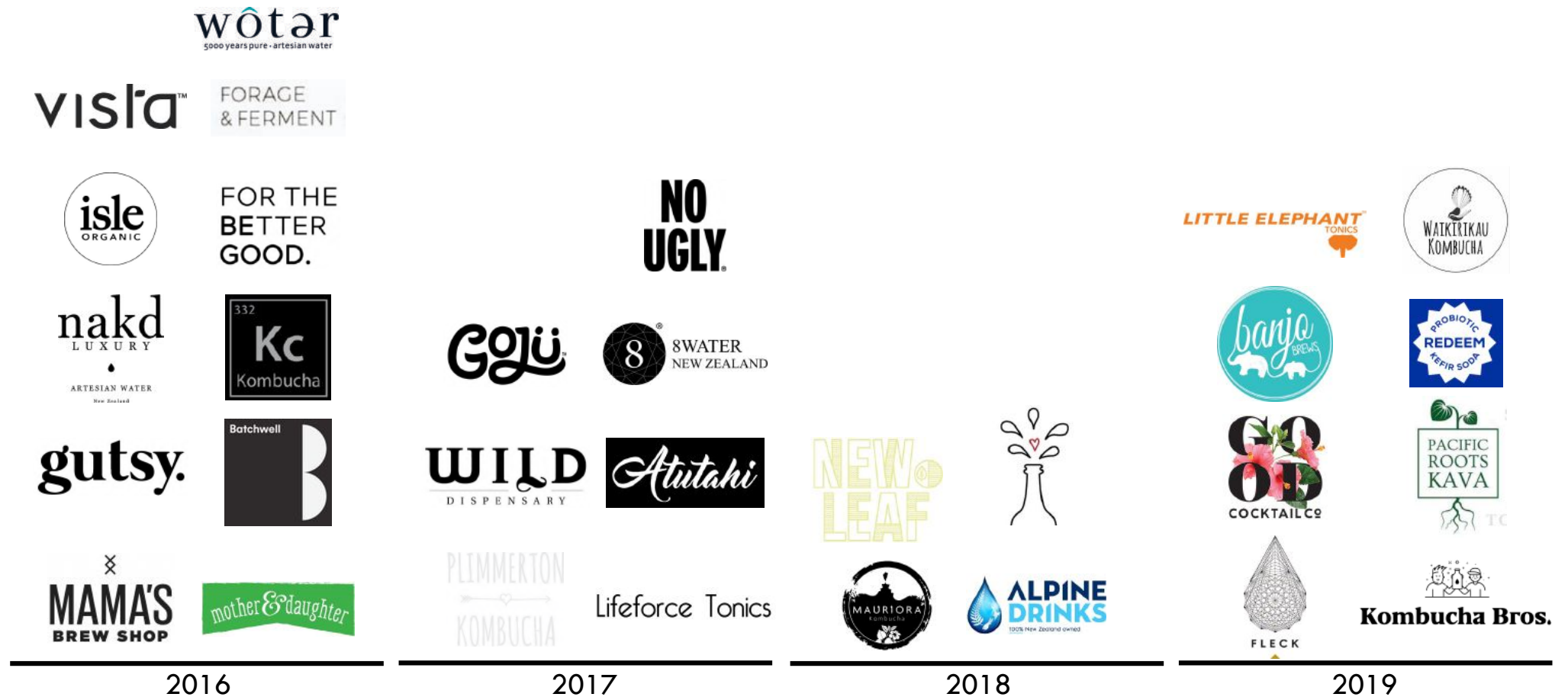
IDENTIFIED/PROFILED FIRMS BY YEAR FOUNDED

Time brand groups; 19th Century to 2019



A huge range of innovative new beverage firms continues to be launched, as these examples from the past five years demonstrate

SELECT EXAMPLES



New Zealand growers are adding value by moving into juices

SELECT EXAMPLES



The logo for AREPA features the word 'AREPA' in a bold, black, sans-serif font. The letter 'A' is stylized with a horizontal bar above it.

- Key ingredient: blackcurrants
- Shareholders own blackcurrant orchard in Christchurch



- Key ingredient: oranges
- Major NZ orange grower



- Key ingredient: cherries
- Cherry farm in Blenheim



- Key ingredient: apples
- Shareholders own orchards in Hawkes Bay



- Key ingredients: berries, nectarines, plums, pears etc.
- Central Otago orchard



- Key ingredients apples and pears
- Apple and pear orchard in Canterbury

New Zealand traditional syrup/cordial firms are extending their brands and ranges into ready-to-drink (RTD)

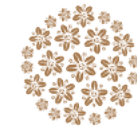
SELECT EXAMPLES



SYRUP



RTD



CORDIAL



RTD

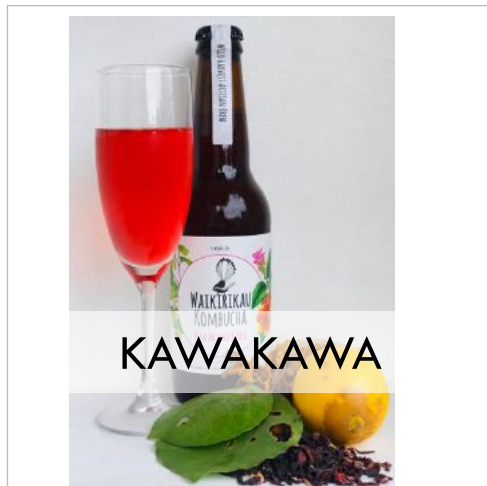
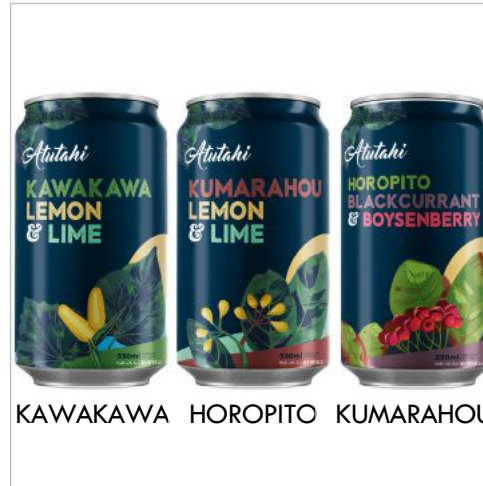
New products are being created around product innovation

SELECT EXAMPLES



New Zealand producers are differentiating themselves by using unique local botanicals, particularly horopito and kawakawa

SELECT EXAMPLES



New Zealand beverage firms are collaborating with each other

SELECT EXAMPLES



DENZIEN GIN +
NO UGLY
KOMBUCHA



THOMPSON'S
VICTOR GIN +
MAMA'S BREW
SHOP KOMBUCHA



BATCHWELL
KOMBUCHA +
KOKAKO COFFEE

New Zealand firms are increasingly conscious about their packaging and packaging footprint

SELECT EXAMPLES

E'STEL



The beverage industry has a constant stream of new product categories that emerge across the Anglo-European world

“ON TREND” IN ANGLO-EUROPEAN MARKETS

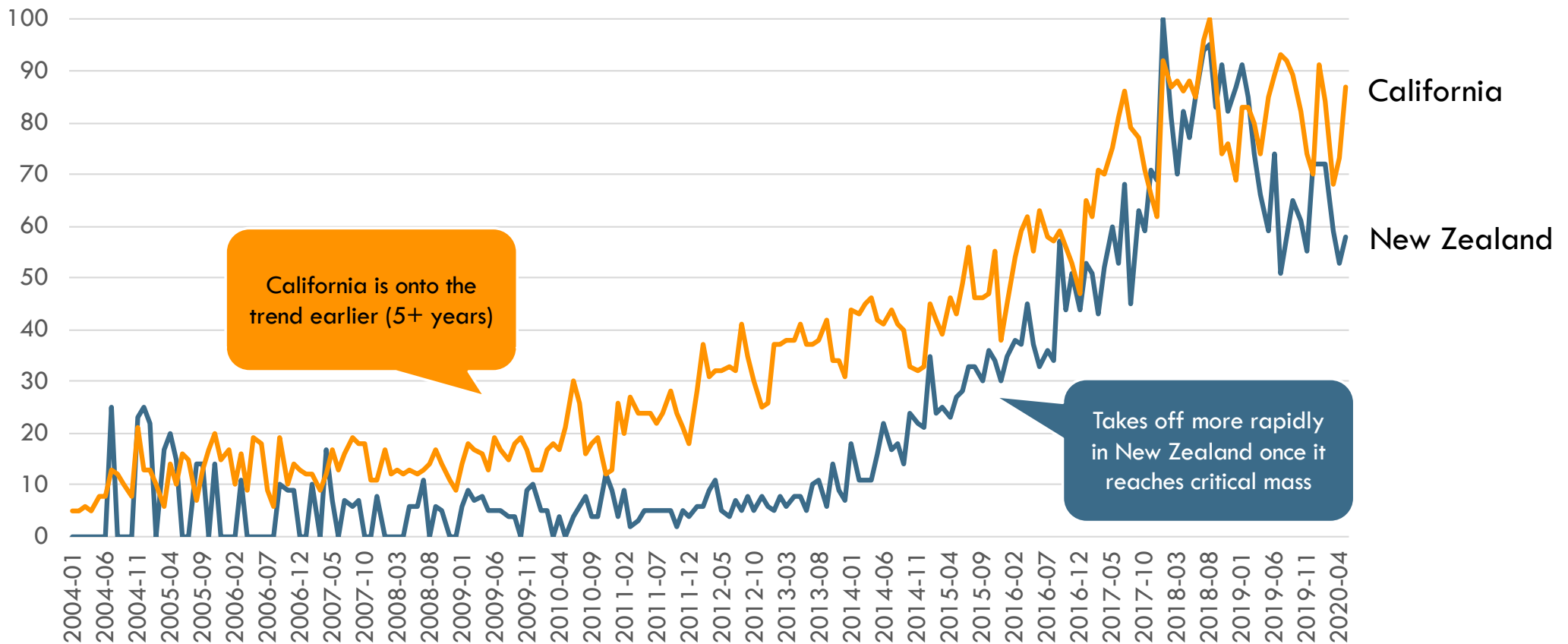
PAST	CURRENT	EMERGING	FUTURE (?)
SPORTS DRINKS	KOMBUCHA	SWITCHEL	TEPACHE
VITAMIN WATERS	HEMP CBD*	KVAS/KVASS	CHICHA
ENERGY DRINKS	TUMERIC SHOTS	KEFIR WATER	MAGEU
CRANBERRY JUICE	PICKLE JUICE	CANNABIS*	ŞALGAM

* Not yet legal in NZ, but approved elsewhere

Despite a reputation for innovation, New Zealand typically lags in adoption of beverage trends

GOOGLE TRENDS DATA: SEARCHES FOR KOMBUCHA: NZ VS. CALIFORNIA

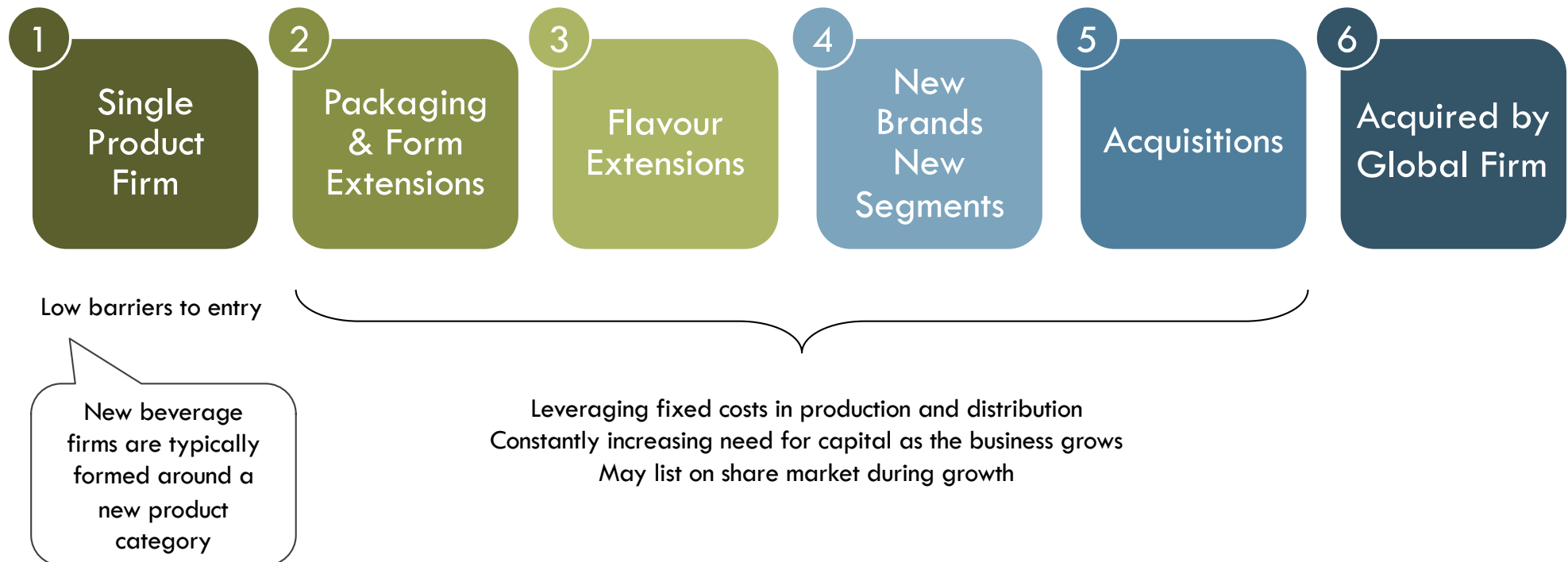
Relative search index; peak=100; Jan 2004-May 2020



New Zealand beverage firms go through a typical pattern of growth

SIMPLIFIED MODEL OF NEW ZEALAND BEVERAGE FIRM EVOLUTION

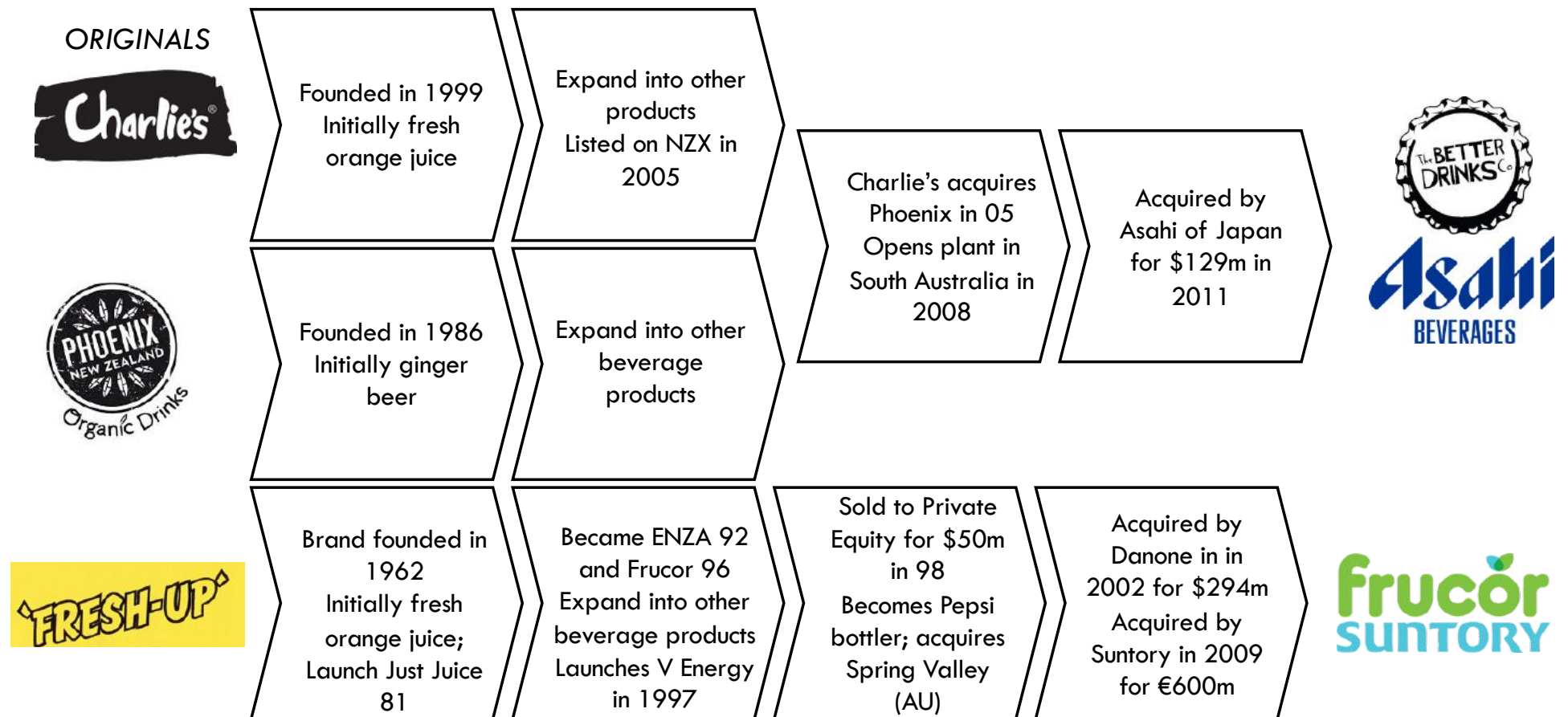
Conceptual model; 2020



Three high profile examples show the pattern

EXAMPLES OF NEW ZEALAND BEVERAGE FIRM EVOLUTION

Simplified examples; select dates



Why does this pattern of growth occur? It is easy to be a small beverage company but is capital intensive to grow

EVOLUTION OF NARTD BEVERAGE CATEGORIES

Simplified model; 2020

STAGE I: SMALL IN A NEW CATEGORY	STAGE II: GROWTH GETS HARDER	STAGE III: THE OFFER YOU CAN'T REFUSE
<ul style="list-style-type: none"> - New category emerges elsewhere and is copied in New Zealand (e.g. Kombucha) - About one every 2-4 years - Often started by returned expats - Barriers to entry are low (New Zealand has been creating +10 new firms/year) - Benchtop scale to shed is easy - 2-3 person operation (“husband and wife” operations) - Product unit prices (\$/l) are relatively high; product targets premium consumers - Distribution done through “a truck” and a patchwork of distributors - Some sales channels are easy to access - Farmers markets - Gourmet/specialty (e.g. Farro) - Health Food (e.g. Commonsense) - Cafes - Competition is limited as category is new and small but growing rapidly (the “new new thing”) 	<ul style="list-style-type: none"> - Product available nationwide across high end outlets; further growth requires entry into larger, more competitive channels that demand high margins across larger volumes - Supermarkets - Chain foodservice - Convenience stores - Delivering the margins required by above channels requires low cost production of high volumes, which is capital intensive (larger factory, lower cost packaging, trucks, chillers, etc.) - National distribution is challenging and outgrows patchwork of regional distributors of mixed quality and performance; firm considers building own distribution network - Many channels require vendor supplied equipment (e.g. fridges) - Competition is growing as category has attracted other new entrants; multinational(s) launch “me-too” copycat products - Launching line extensions to build volume 	<ul style="list-style-type: none"> - Product is available across all channels - Exports are growing to Australia; Australian imports may now be arriving - Large multinationals with strong distribution have entered the category - Original firms that “started the category” <ul style="list-style-type: none"> - Are struggling to manage growth - Have a constant need for capital - Have raised capital in multiple rounds from multiple sources - Has launched numerous line extensions and new brands - Are seeking to leverage fixed costs and distribution infrastructure - Multinationals offer distribution to leading fast growth smaller firms to draw them “into their web” - Originating firms either (1) list on the NZX, (2) are acquired by major multinational or (3) dwindle and retreat into obscurity

Larger beverage firms ultimately end up offering a full range of beverages across all categories and segments to leverage scale



All four major New Zealand non-alcoholic beverage firms are moving towards competing across all categories

	Coca-Cola Amatil	Suntory Frucor-Suntory	Asahi Better Drinks	Kirin/Lion Beverages
TRADITIONAL SOFT DRINKS	Coca-Cola, Sprite, Fanta, Lift, L&P	Pepsi, 7UP, Mountain Dew, Lucozade	-	-
MIXERS	Schweppes		Phoenix Organic	-
SPORTS DRINKS	Powerade	Gatorade	-	-
ENERGY DRINKS	Monster Energy Mother	Rockstar V Energy	Phoenix Organic Energy	-
WATER	Pump Kiwi Blue	H2Go NZ Natural	Phoenix Organic	-
FLAVOURED WATER	Pumped	H2Go Mizone NZ Natural	Phoenix Organic	-
JUICE	Keri Juice Most Thexton's	Fresh Up Just Juice Simply Squeezed	McCoy Ribena Charlies Juice Lucy Phoenix Organic	-
ADULT SOFT DRINKS	Deep Springs	Amplify kombucha*	Charlie's Honest Fizz Phoenix Organic	GoodBuzz Höpt Mac's
CORDIAL	Rose's Baker Hall	-	-	-
COFFEE & TEA BEVERAGES	Barista Bros Grinders Fuze Tea	V Iced Coffee Suntory BOSS coffee	Phoenix Chai Ti Tonics Real Iced Tea	Havana Coffee Teza

* Not manufactured in NZ; Source: various company websites; Coriolis analysis and classifications

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& Trends

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6. Firm Profiles

Appendices

1 ABOVE 2019



HYDRATION MASTER Cameron Russell

DESCRIPTION Wellness beverages and effervescent tablets; Supporting travel recovery, boosting immunity, circulation and hangover recuperation.

KEY PRODUCTS 1Above Hydration, 1Above effervescent tablets

BRANDS 1 Above

OWNERS Russell, others

CO. # 7785476

ADDRESS 131 Kerrs Road, Wiri, Auckland

PHONE +64 9 379 5708

WEBSITE www.live1above.com

FOUNDED 2010

STAFF # 5 + **SEASONAL #**

REVENUE \$M \$1 - \$5m (2019) Est.
Source: Company

HIGHLIGHTS Frequent flyers, business people and athletes choice for fighting jetlag. Distribution development in the USA, Australia, South East Asia, China and Japan in 2020

8 WATER NEW ZEALAND



DESCRIPTION Premium bottled water company based in Auckland

KEY PRODUCTS Still and sparkling water

BRANDS 8water, dela

OWNERS Chang, Chai, Bhandal

CO. # 6244475

ADDRESS Auckland

PHONE

WEBSITE www.8water.co.nz

FOUNDED 2017

STAFF # + **SEASONAL #**

REVENUE \$M \$1 - \$2m (2019) Est.
Source: Coriolis

HIGHLIGHTS

ADDMORE FOODS



DIRECTOR Kathryn Addis

DESCRIPTION Sparkling elderflower beverage manufacturer; based in Geraldine, Canterbury.

KEY PRODUCTS Premium sparkling and cordial elderflower beverages

BRANDS Addmore

OWNERS Addis, Darling

CO. # 3226868

ADDRESS 2 Connolly Street, Geraldine, Canterbury

PHONE +64 3 693 8343

WEBSITE www.addmore.co.nz

FOUNDED 2002

STAFF # + **SEASONAL #**

REVENUE \$M \$1 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

ALMIGHTY BEVERAGES



CEO Ben Lenart

DESCRIPTION Water and juice manufacturer, using cans and bottles; sales in NZ, Australia and Singapore, Karma Drinks distribution partners.

KEY PRODUCTS Sparkling water, organic juices

BRANDS Almighty

OWNERS Lenart, others

CO. # 5781707

ADDRESS 376 Great North Road, Grey Lynn, Auckland

PHONE

WEBSITE www.drinkalmighty.com/

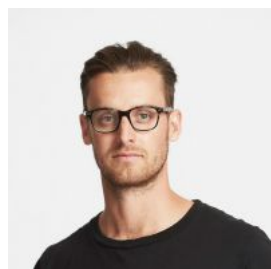
FOUNDED 2015

STAFF # 4 + **SEASONAL #**

REVENUE \$M \$1 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS Successful launch into the NZ food-service channel in 2015. Launched into Australia in 2017 and Singapore in 2019. Stocked in 1250+ premium food-service stockists. Foodstuffs entry in 2020 with Australasia's first organic juice in a can. Over 3000 children educated in growing and cooking fresh produce skills via contributions directly from juice and water sales.

ALPHAGEN NZ



CO-FOUNDER Angus Brown

DESCRIPTION Health tonic and nootropics, powder, beverage and processed manufacturer of blackcurrants; contract manufactured in Tauranga; exporting tonic to HK, China, Singapore AU.

KEY PRODUCTS Tonic, beverage, capsules, powder, freeze dried berries

BRANDS Arepa

OWNERS Brown 36%, Stephens family 12%, ENZO Nutraceuticals 10%, others

CO. # 4446402

ADDRESS 32 Hannigan Drive,
St Johns,
Auckland

PHONE +64 27 455 5251

WEBSITE www.drinkarepa.com

FOUNDED 2013

STAFF # 6 + **SEASONAL #**

REVENUE \$M \$2 - \$5m (2019) Est.
Source: Company

HIGHLIGHTS Developed and produced in The FoodBowI; published clinical trial studies '20; launching into Taiwan, ME '20;

ALPINE DRINKS NZ



OWNER Arajan Odedra

DESCRIPTION Water bottling manufacturer sourcing water from the Heretaunga aquifer in Hawke's Bay.

KEY PRODUCTS Still and sparkling, bottled and boxed water

BRANDS Alpine Drinks

OWNERS Odedra

CO. # 6930068

ADDRESS 600 State Highway 51, Awatoto,
Napier,
Hawke's Bay

PHONE +64 9 555 6744

WEBSITE www.alpinedrinks.co.nz

FOUNDED 2018

STAFF # 5 + **SEASONAL #** 4

REVENUE \$M \$1.5 - \$3m (2019)
Source: Company

HIGHLIGHTS Recently commissioned state of-the-art beverage facility in Hawkes Bay; export capability and export licensing for China, India and Middle East in progress; contract packaging capability and launching four in-house brands in the NZ market summer 2020

APOLLO FOODS



MANAGING DIRECTOR Ross Beaton

DESCRIPTION Manufacturers of apple juice, cold pressed by specific apple variety, based in Hawke's Bay. Contract bottling with Fonterra Brands New Zealand, Mammoth & Primo flavoured milk products; plant capacity is 50m bottles per year.

KEY PRODUCTS Varietal Apple Juice, Varietal Apples paired with fruits & wellness ingredients

BRANDS The Apple Press

OWNERS Beaton family 55%, Ericksen family 10%, others

CO. # 4506558

ADDRESS Te Ara Kahikatea,
Whakatu, Hastings,
Hawkes Bay

PHONE +64 800 568 3277

WEBSITE www.apollofoods.co.nz
www.theapplepress.co.nz

FOUNDED 2013

STAFF # 27 + **SEASONAL #**

REVENUE \$M \$10 - \$20m (2019) Est.
Source: Coriolis

HIGHLIGHTS State of the art beverage facility opened 2018, The Apple Press (Jazz); Winner Massey Food Awards (Best Non-Alcoholic Beverage 2018), The Apple Press launched into New Zealand market 2018 & Woolworths Australia 2019 and the Japanese supermarket trade 2019; looking to bottle water in facility

AQUA SPLASH (NZ)



CEO Mark Manson

DESCRIPTION Bottle water manufacturer; water sourced from Blue Spring, Putaruru; purpose built facility, blows PET bottles onsite, capacity in excess of 50m units/yr and consent for 200,000L/day; private label production for firms in Japan, China, Australia, USA, Pacific Islands and NZ.

KEY PRODUCTS Bottled water

BRANDS Aqua Splash, Waihou Spring, Te Waihou Reserve, SOH2O, Blue Spring Water

OWNERS Anderson 96%, Lee family, Daniell 3%, McKeown family 1%

CO. # 1594432

ADDRESS 34 Domain Road,
Putaruru,
Waikato

PHONE +64 7 883 3985

WEBSITE http://www.tewaihouwater.co.nz

FOUNDED 2005

STAFF # 10 + **SEASONAL #**

REVENUE \$M \$4 - \$7m (2017) Est.
Source:

HIGHLIGHTS

AQUACEUTICALS NZ



GENERAL MANAGER Mark Griffiths

DESCRIPTION Boxed and bottled water company, based in Auckland, sourced from Otakiri Artesian Aquifer and contract bottled; domestic plus delivery model and export.

KEY PRODUCTS Water 15L, 10L boxes, bottled water

BRANDS Water in a box, U Water

OWNERS Curd, Carran, Wicks, others

CO. # 1475902

ADDRESS Unit 26/18 Airborne Road
Albany,
Auckland

PHONE +64 9 415 6564

WEBSITE www.aquaceuticals.co.nz
www.waterinbox.co.nz

FOUNDED 2004

STAFF # 4 + **SEASONAL #**

REVENUE \$M \$1 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

ARAHI BEVERAGES



DIRECTOR Jo-anne Short

DESCRIPTION Alcohol free sparkling "wine" manufacturer; uses wine grapes; cold pressed.

KEY PRODUCTS Alcohol free sparkling "wine"

BRANDS Arahi

OWNERS Wilson 50%, Short 50%

CO. # 5231541

ADDRESS 58 Rama Crescent,
Khandallah,
Wellington

PHONE +64 21 934 537

WEBSITE www.arahi.nz

FOUNDED 2014

STAFF # + **SEASONAL #**

REVENUE \$M \$0 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

AROHA DRINKS



OWNER Mark Dillon

DESCRIPTION Premium beverage manufacturer; distribution nationally through cafes and stores; franchise model to distribute throughout NZ to wholesale customers; wild harvest of elderflowers in South Island.

KEY PRODUCTS Cordials, sparkling, still

BRANDS Aroha

OWNERS Dillon

CO. # 1949227

ADDRESS 16 Ayr Street,
Riccarton, Christchurch,
Canterbury

PHONE +64 3 341 1183

WEBSITE www.arohadrinks.co.nz

FOUNDED 2007

STAFF # 5 + **SEASONAL #**

REVENUE \$M \$2 - \$4m (2019) Est.
Source: Coriolis

HIGHLIGHTS

BANJO BREWS



CO-FOUNDER Heather McAlpine

DESCRIPTION Kombucha organic beverage manufacturer based in Marlborough; distribute across New Zealand; use native botanicals.

KEY PRODUCTS Kombucha ready to drink

BRANDS Banjo Brews

OWNERS McAlpine (30%), Judge (30%), others

CO. # 5552931

ADDRESS 795 Old Renwick Road,
Marlborough

PHONE +64 27 490 0509

WEBSITE www.banjobrews.co.nz

FOUNDED 2019

STAFF # 4 + **SEASONAL #**

REVENUE \$M \$0.5 - \$2m (2019) Est.
Source: Coriolis

HIGHLIGHTS

BARKER FRUIT PROCESSORS



CEO Agnes Baekelandt

DESCRIPTION Manufacturer of fruit and plant-based products and beverages retail and foodservice customers; factory based in Geraldine, South Canterbury; local and export markets.

KEY PRODUCTS Spreads, jams, chutneys, syrups, condiments, sauces, toppings, compotes, snack and bakery fillings, industrial fruits and vegetables preparations, cordials and syrups and spritzers

BRANDS Barker's of Geraldine, Barker's New Zealand, Anathoth Farm, Anathoth Farm Chef Series, Barker's Professional, Barker's Foodstore & Eatery

OWNERS Andros et Cie SAS 84%, Barker family 11%, Riley 4%, Donkers 1%

CO. # 135218

ADDRESS 72 Shaw Road, Geraldine, Canterbury

PHONE +64 3 693 8969

WEBSITE www.barkers.co.nz
www.barkersprofessional.nz
www.anathoth.co.nz

FOUNDED 1969

STAFF # 230 + **SEASONAL #**

REVENUE \$M \$75m (2019)
Source: AR19

HIGHLIGHTS French fruit and jam company Andros acquired Barker's in '15; won the Dry Category NZ Food Awards in '16; launched Unsweetened Blackadder Blackcurrant Juice, for brain health and 500ml premium cordials in '16; new CEO in Feb '18; finalist in SC 2019 Alpine Energy Business Excellence Award '19; Category Winner in Westpac Champion Canterbury Business Awards '19; opened new store and eatery in Geraldine in '19; Celebrating 50 years of innovation and great food in Oct '19; introduced tomato sauce '20, launched meal sauces '20

BE NOURISHED



OWNER Joanna Nolan

DESCRIPTION Fermented food and beverage manufacturer; broad distribution throughout NZ in New World, Bin Inn, other speciality stores.

KEY PRODUCTS Sauerkrauts, kimchi, fermented sauerkraut juices, probiotic tonics, gut shots

BRANDS Be Nourished

OWNERS Nolan

CO. # 5451283

ADDRESS 7/61 View Road, Wairau Valley, Auckland

PHONE +64 9 441 4328

WEBSITE www.benourished.co.nz

FOUNDED 2014

STAFF # 5 + **SEASONAL #**

REVENUE \$M \$1 - \$2m (2019) Est.
Source: Coriolis

HIGHLIGHTS

BEARSLEY EXPORTS



MANAGING DIRECTOR Danny Bearsley

DESCRIPTION Vertically integrated produce company; Bearsley Farms has orchard and crops grown primarily in the Hawke's Bay for export; grower partners across NZ; partnership with Ka Tahi Wines.

KEY PRODUCTS Apples, kiwifruit, plums, squash, juice, smoothies, dried kiwifruit, wine, water

BRANDS Pure Kiwi (water, juice, smoothies, dried kiwifruit)

OWNERS Bearsley Family

CO. # 524944

ADDRESS 91 Thames Street, Pandora Napier, Hawke's Bay

PHONE +64 6 878 2326

WEBSITE www.bearsley.co.nz

FOUNDED 1991/1999

STAFF # 50 + **SEASONAL #**

REVENUE \$M \$10 - \$20m (2019) Est.
Source: Coriolis

HIGHLIGHTS

BENJER DRINKS CO



BENJER DRINKS CO.

CO-OWNER Wayne Noble

DESCRIPTION Juice and preserves manufacturer; orchard in Cromwell, Otago (Provisions Orchard) locally sourced fruit; sold into retail, foodservice.

KEY PRODUCTS Juice, stone fruit, berries, pears, feijoa, chutneys, jams, preserves

BRANDS Benjer Drinks, Provisions of Central Otago, Provisions Orchard

OWNERS Ward, Butson 50%, Noble family 50%

CO. # 1038391

ADDRESS 211 Ripponvale Road, Cromwell, Otago

PHONE +64 3 445 4474

WEBSITE www.benjer.co.nz

FOUNDED 2000

STAFF # 3 + **SEASONAL #**

REVENUE \$M \$2 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

BEVPAC NZ (1996)/ TSL PLASTICS



MANAGING DIRECTOR Graham Lundie
DESCRIPTION Carbonated beverage manufacturers and contract packers; P.E.T bottle manufacturer sister company.

KEY PRODUCTS Contract beverage filling

BRANDS Jolly, house brands

OWNERS Lundie family 50%, Smith, Borich 50%

CO. # 803057/286873

ADDRESS 76 Lady Ruby Drive,
East Tamaki,
Auckland

PHONE +64 9 914 7180

WEBSITE www.tsplastics.nz

FOUNDED 1996/1986

STAFF # 50 + **SEASONAL #**

REVENUE \$M \$15 - \$20m (2019) Est.
Source: Coriolis

HIGHLIGHTS

BIOBREW



MANAGING DIRECTOR Andre Prassinos
DESCRIPTION Manufacturer of fresh probiotic microbial tools for sustainable farming across two locations in North and South Island; 91% ownership in LiveBrew daily probiotic beverage.

KEY PRODUCTS Probiotic beverage supplement

BRANDS LiveBrew, Equibrew, Clafbrew, Stockbrew,

OWNERS Hughes, Prassinos, Pearson & others

CO. # 2243451

ADDRESS Rotorua
Bay of Plenty

PHONE 0508 2462 739

WEBSITE www.biobrew.net.nz
www.livebrew.co.nz

FOUNDED 2009

STAFF # + **SEASONAL #**

REVENUE \$M \$5 - \$10m (2019) Est.
Source: Coriolis

HIGHLIGHTS

BLUEBIRD FOODS



GENERAL MANAGER Ali Hamza
DESCRIPTION New Zealand's largest manufacturer of chips and snacks; major manufacturer of beverages; factory in Auckland; managed out of PepsiCo Australia & New Zealand; uses ~30,000 tonnes of potatoes each year.

KEY PRODUCTS Potato chips, corn chips, extruded and other salty snacks

BRANDS Bluebird, Doritos, Grain Waves, Copper Kettle, SunBites, LeSnak, Twisties, Cheezels, Rashuns, Burger Rings, Poppa Jacks, Nobbys, Red Rock Deli, Sunbites

OWNERS PepsiCo Inc. (NYSE: PEP) via PepsiCo ANZ Holdings (AU)

CO. # 163343

ADDRESS 124 Wiri Station Road,
Manukau,
Auckland

PHONE +64 9 262 8800

WEBSITE www.bluebird.co.nz
www.pepsico.com.au

FOUNDED 1947

STAFF # 400 + **SEASONAL #**

REVENUE \$M \$155m (2018)
Source: AR18

HIGHLIGHTS Sold Flemings muesli bar business to Prolife Foods in Dec '16; \$23m operating profit in FY18; 2018 new products to support New Zealand rugby

BOOTLEGGERS BOTTLING CO



FOUNDER James Waugh
DESCRIPTION Premium Craft Soda mixer manufacturers.

KEY PRODUCTS soda mixers (tonics, lemon, lime & bitters, ginger beer)

BRANDS Bootleggers

OWNERS

CO. # 4635379

ADDRESS 7 Asquith Terrace, Brooklyn,
Wellington

PHONE

WEBSITE www.bootleggers.nz

FOUNDED 2013

STAFF # + **SEASONAL #**

REVENUE \$M \$1 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS

BRENCHLEY

ECOLOGY + CO

CO-OWNER Diana Miller

DESCRIPTION Alcohol free spirit manufacturer; based in Auckland; currently two "gins" in range; online and retail, hospitality venues; distribution arrangement with Lion.

KEY PRODUCTS Alcohol free spirits

BRANDS Ecology & Co

OWNERS Miller family

CO. # 5137641

ADDRESS 86 Calliope Road,
Devonport,
Auckland

PHONE +64 27 280 2828

WEBSITE www.ecologyandco.com

FOUNDED 2014

STAFF # 3 + **SEASONAL #**

REVENUE \$M \$1 - \$2m (2018)
Source: Coriolis

HIGHLIGHTS

BRIX & CO



CEO James Shortall

DESCRIPTION Family owned contract manufacturers of beverages (wine, non-alcoholic) in Auckland; full end-to-end service including packaging sourcing, production, bottling, testing, warehousing and shipping; production up to 200,000 bottles/day.

KEY PRODUCTS Beverages, wine, cider, spirits, nutraceuticals, kombucha

BRANDS Hunting Lodge (wine)

OWNERS Sutton Group (Sutton Family)

CO. # 6032656

ADDRESS 307 Waikoukou Valley Road
Waimauku,
Auckland

PHONE +64 9 964 0542

WEBSITE www.brix.co.nz

FOUNDED 2016

STAFF # 80 + **SEASONAL #** 10

REVENUE \$M \$20 - \$50m (2019) Est.
Source: Coriolis

HIGHLIGHTS

CH'I INTERNATIONAL



MANAGING DIRECTOR Ray Nicholls

DESCRIPTION Sparkling herbal beverage manufacturer; based in Auckland.

KEY PRODUCTS Sparkling beverages

BRANDS Ch'i

OWNERS Williamson, Nicholls

CO. # 364499

ADDRESS Unit A, 2 Sawmill Road,
Riverhead,
Auckland

PHONE +64 9 412 2348

WEBSITE www.chidrinks.com

FOUNDED 1987

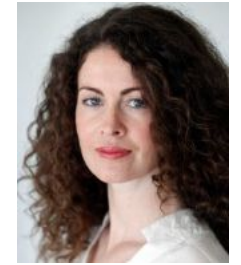
STAFF # 5 + **SEASONAL #**

REVENUE \$M \$2 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS

Management buyout in 2019; plans for expansion after moving headquarters from Albany to Riverhead, Auckland; distribution agreement with Bundaberg Brewed Drinks to improve awareness, sales and distribution, Mar 20; looking for partners in US, UK and Canada

CHIA



MANAGING DIRECTOR Chloe van Dyke

DESCRIPTION Manufacturer of chia, sparkling coconut water beverages; exports to Malaysia, Singapore, Australia; bottles at Nelson Bay Brewery in Stoke; over 200 stockists in NZ and expanding globally.

KEY PRODUCTS Chia and fruit juice drinks, sparkling coconut water, hemp smoothies, seeds and protein powders

BRANDS Chia, Chia Sisters,

OWNERS Van Dyke family, Le Gros

CO. # 3736936

ADDRESS 93 Pascoe Street,
Annesbrook,
Nelson

PHONE +64 3 547 9300

WEBSITE www.chia.co.nz

FOUNDED 2012

STAFF # 5 + **SEASONAL #**

REVENUE \$M \$2 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

Invested \$150,000 for custom built equipment and moved into new warehouse in '15; growth in Australia, launched coconut drinks, shifted to new factory and increased production with "Bottled in the Sun"; launched hemp smoothies '19 supported by FoodSouth in Christchurch

COCA-COLA AMATIL NZ



MANAGING DIRECTOR Chris Litchfield

DESCRIPTION One of NZ's largest manufacturers and distributors of RTD beverages; manufacturer and distributor of The Coca-Cola Company's and the Monster Energy Company's beverage brands in NZ. The company has a rich heritage of providing NZers with access to great tasting beverages for over 100 years. Employs around 1,000 people throughout the country and indirectly creates thousands more jobs across the supply chain and with key suppliers.

KEY PRODUCTS Soft drinks, juices, water, flavoured dairy, alcoholic spirits, beer, cider, energy drinks, coffee

BRANDS International and local brands include: Coca-Cola, Pump, POWERADE, L&P, Zephyr Coffee, Jim Beam, Monster Energy, Fortune Favours, Schweppes, Fuze Tea, Kiwi Blue, Barista Bros, Keri

OWNERS Coca-Cola Amatil Limited (ASX:CCL)

CO. # 46860

ADDRESS The Oasis, Carbine Road, Mt Wellington, Auckland

PHONE 0800 262 226

WEBSITE www.ccamatil.co.nz
www.ccamatil.com

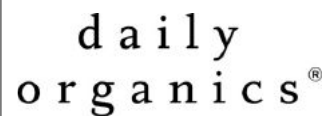
FOUNDED 1914

STAFF # 1,000 + **SEASONAL #**

REVENUE \$M \$635.5m (2019)
Source: AR19 (NARTD only)

HIGHLIGHTS AON Hewitt Best Employer accreditation since 2016; First FMCG company to gain Rainbow Tick accreditation in 2015; One of the first companies in New Zealand to receive the Gender Tick All plastic bottles under 1 litre and water bottles in all sizes are made from 100% recycled plastic; 20% sugar reduction goal across its NARTD portfolio by 2025; Signatory on the Government's NZ Plastic Packaging Declaration; Committed to the Government's Healthy Kids Pledge

DAILY ORGANICS



DIRECTOR Delwyn Ward

DESCRIPTION Boutique organic beverage company based in Matakana; biogro organic certified.

KEY PRODUCTS Kombucha, apple cider vinegar

BRANDS Daily Organics

OWNERS Ward, Gwynne

CO. # 4676763

ADDRESS 2 Matakana Valley Road, Matakana, Auckland

PHONE

WEBSITE www.dailyorganics.com

FOUNDED 2013

STAFF # 3 + **SEASONAL #**

REVENUE \$M \$1 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS

DKSH NEW ZEALAND



MD- NZ Russell Wilson

DESCRIPTION Global market expansion services provider, across consumer goods, performance materials and technology; acquired trademarks for Loaded Drinks.

KEY PRODUCTS Beverage, food products, performance materials, technology

BRANDS Loaded, Zero, Pure Energy, Illicit, The Natural Beverage Company of NZ, NOS liquid energy, Demon, Hunger Buster Liquid Fuel, The Big Chill

OWNERS DKSH AG

CO. # 6902814

ADDRESS 279 Railway Road, Milson Palmerston North, Manawatu-Wanganui

PHONE +64 508 356 5323

WEBSITE www.loadeddrinks.com

FOUNDED 1958/2018

STAFF # + **SEASONAL #**

REVENUE \$M \$149.8m (2018)
Source: AR

HIGHLIGHTS Acquired beverages portfolio and brands from Davies Foods '18

EAST IMPERIAL



CO-FOUNDER/CEO Tony Burt

DESCRIPTION Manufacturers of premium mixers; targeted at high end bars and restaurants; exports to over 30 countries with focus on Asia; hosts East Imperial Gin Jubilees across Asia to showcase gin; contract manufacturing at McCashins.

KEY PRODUCTS Tonic waters, soda water, ginger beer, ginger ale

BRANDS East Imperial Superior Beverages

OWNERS East Imperial Pte. Ltd

CO. # 4115480

ADDRESS Level 2, 27 Bath Street, Parnell, Auckland

PHONE +64 21 985 567

WEBSITE www.eastimperial.com

FOUNDED 2012

STAFF # 16 + **SEASONAL #**

REVENUE \$M \$5 - \$10m (2019)
Source: Company

HIGHLIGHTS East Imperial is a premium mixer brand, exported to over 30 countries and found in the world's leading high-end luxury locations. Noted as one of the global leaders in the category, East Imperial have successfully positioned themselves as the more discerning and ultra premium choice within the category. The direct result of a strong brand narrative, ingredient sources, and flavours.

ECOWAI



MANAGING DIRECTOR Barry Hillyer

DESCRIPTION Bottled water company based in Putaruru, sourcing the Blue Spring Te Waihou Spring; uses 100% recycled plastic and glass.

KEY PRODUCTS still water, sparkling water

BRANDS Ecowai

OWNERS Hillyer

CO. # 2089655

ADDRESS 34 Domain Road, Lichfield, Waikato

PHONE +64 9 352 9100

WEBSITE www.ecowai.co.nz

FOUNDED 2008

STAFF # + **SEASONAL #**

REVENUE \$M \$1 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS

EDEN JUICE



FOUNDER Gary Bignell

DESCRIPTION Fruit Juice Manufacturer based in Alexandra, Central Otago and Hastings, Hawke's Bay. Specialising in Pure Juices made from high quality berries with good health properties.

KEY PRODUCTS Cherry juice, blueberry juice, Sparkling Juice range

BRANDS Eden Orchards

OWNERS Bignell Family 70%, Gourmet Paprika 30%

CO. # 6329547

ADDRESS 49 Boundary Road, Alexandra, Central Otago

PHONE +64 21 708 844

WEBSITE www.edenorcharts.co.nz

FOUNDED 2017

STAFF # 10 + **SEASONAL #**

REVENUE \$M \$2 - \$5m (2020) Est.
Source: Coriolis

HIGHLIGHTS New cherry juice products finalists in the 2018 Fine Food New Zealand Most Innovative Retail Grocery Product category

EDEN ORCHARDS



FOUNDER Gary Bignell

DESCRIPTION Fruit grower, marketer, exporter; 30 ha of cherry orchard in Waihopai Valley, Marlborough; Eden Orchards (growing), Legacy Cherries (export sales), Cherry Club (corporate sales), Eden Orchards Cherry juice; source 40ha from Central Otago; Eden Juice partnership with Gourmet Paprika

KEY PRODUCTS Cherries, apricots, nectarines, peaches, cherry juice, sparkling cherry juice

BRANDS Eden Orchards

OWNERS Bignell

CO. # 3980659

ADDRESS 825 Waihopai Valley Road, Blenheim, Marlborough

PHONE +64 3 572 4406

WEBSITE www.edenorcharts.co.nz

FOUNDED 2010

STAFF # 2 + **SEASONAL #** 120

REVENUE \$M \$2 - \$5m (2017)
Source:

HIGHLIGHTS New cherry juice products finalists in the 2018 Fine Food New Zealand Most Innovative Retail Grocery Product category

ELLIOTT CORPORATION



OWNER Glenn Elliott

DESCRIPTION Organic kiwifruit beverage manufacturer based in Auckland.

KEY PRODUCTS Juice Beverage

BRANDS King of Kiwi

OWNERS Elliott, Le Quesne

CO. # 4259338

ADDRESS 202 Karangahape Road, Auckland

PHONE +64 9 975 0651

WEBSITE www.kingofkiwi.co.nz

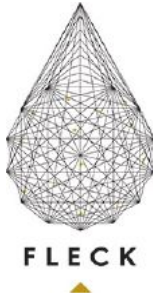
FOUNDED 2013

STAFF # 6 + **SEASONAL #**

REVENUE \$M \$0.5 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS

FLECK WATER



DIRECTOR Craig Purdy

DESCRIPTION Artisan bottled water company from Queenstown.

KEY PRODUCTS Bottled water

BRANDS Fleck

OWNERS Purdy and Robinson

CO. # 7642177

ADDRESS 2485 Gibbston Highway,
Queenstown,
Otago

PHONE +64 204 189 7232

WEBSITE www.fleck.co.nz

FOUNDED 2019

STAFF # 2 + **SEASONAL #**

REVENUE \$M \$0 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS Fleck sparkling mineral water launched Dec 2019;
Silver Medal at Outstanding NZ Food Producers
Awards 2020

FOR THE BETTER GOOD

FOR THE BETTER GOOD.

CEO Jayden Klinac

DESCRIPTION Bottled water, bottles made from plants; closed
system of distribution and collection.

KEY PRODUCTS Bottled Water

BRANDS For the Better Good water

OWNERS Klinac, others

CO. # 5968327

ADDRESS

PHONE +64 27 318 8998

WEBSITE www.forthebettergood.com

FOUNDED 2016

STAFF # + **SEASONAL #**

REVENUE \$M \$0 - \$0.5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

FOUNTAIN DRINKS



**MANAGING
DIRECTOR** Gary Robertson

DESCRIPTION Specialist manufacturer of postmix syrups (18
standard range flavours) and dispensing
equipment.

KEY PRODUCTS Postmix syrups, cold brew coffee, cordials,
dispensing equipment

BRANDS Fountain drinks

OWNERS Private (Robertson)

CO. # 875817

ADDRESS 89 Hugo Johnston Drive
Penrose,
Auckland

PHONE +64 9 525 0892

WEBSITE www.fountaindrinks.co.nz

FOUNDED 1997

STAFF # 8 + **SEASONAL #**

REVENUE \$M \$2 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

FOXTON FIZZ



**MANAGING
DIRECTOR** Matt Watson

DESCRIPTION Carbonated beverage manufacturing company;
established over 100 years ago, now
manufacturing in Auckland and distribute out of
Foxtan.

KEY PRODUCTS carbonated beverages

BRANDS Foxtan Fizz

OWNERS Private NZ; 46% Wilson and Watson others

CO. # 1805320

ADDRESS 8 Whyte Street,
Foxtan,
Manawatu-Wanganui

PHONE +64 6 363 8271

WEBSITE www.foxtanfizz.co.nz

FOUNDED 1918/2006

STAFF # + **SEASONAL #**

REVENUE \$M \$1 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS

FRUCOR SUNTORY NEW ZEALAND



CEO Darren Fullerton

DESCRIPTION Leading Australasian drinks company origins dating back to the early 1960s making juice from unwanted export fruit. Frucor became part of the Suntory Group 2009. Two sites in New Zealand (Auckland and Hawke's Bay) and one in Sydney. Manufactures 20m cases of drinks/year from its south Auckland plant; bottles and distributes PepsiCo products in NZ.

KEY PRODUCTS Energy drinks, juice, sports drinks, water, carbonated soft drinks, kombucha

Frucor Suntory's brands include V Energy, Just Juice, Fresh Up, Simply Squeezed, h2go, NZ

BRANDS V Energy, Just Juice, Fresh Up, McCOY, Mizone, Simply Squeezed, h2go, NZ Natural, Amplify kombucha, Rockstar, Suntory BOSS Coffee, Ribena, Lucozade. Licensed bottler for Pepsi,

OWNERS Suntory Holdings Ltd (Kotobuki Realty 90%, others)

CO. # 913026

ADDRESS 86 Plunket Avenue, Manukau City, Auckland

PHONE +64 9 250 0100

WEBSITE www.frucorsuntory.com

FOUNDED 1962

STAFF # 770 + **SEASONAL #**

REVENUE \$M \$447m (2018)
Source: AR18

HIGHLIGHTS Launched V Energy in 1997; Frucor Australia started trading in 2001; millionth can of V produced in 2002. Suntory purchases Frucor in 2009; licensing agreement with Rockstar in AU and NZ signed in 2011; new R&D Centre opens in Auckland 2014. Became Frucor Suntory in 2017, launched Amplify kombucha in 2018 and Suntory BOSS Coffee in 2019. Employ over 1,000 people, including 285 in Australia.

GLENORIE INTERNATIONAL



MANAGING DIRECTOR Alan Smith

DESCRIPTION Super premium NZ artesian water, includes gold leaf packed in an embossed gold foil package and giftbox option; NZ Gold is a division of Glenorie International.

KEY PRODUCTS Bottled water still

BRANDS New Zealand Gold

OWNERS Smith 75%, Jones 25%

CO. # 103428

ADDRESS 39 Woodside Ave, Northcote, Auckland

PHONE +64 9 419 4071

WEBSITE www.nzgoldartesian.com

FOUNDED 1978

STAFF # + **SEASONAL #**

REVENUE \$M \$0.5 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

GOJU



OWNER Tom Hartles

DESCRIPTION Wellness shots co-developed and produced at the FoodBowl in Auckland; 60ml bottles.

KEY PRODUCTS Wellness tonic

BRANDS Goju

OWNERS Hartles family (80%), Parker (17%)

CO. # 6259952

ADDRESS Auckland

PHONE

WEBSITE www.gojushots.com

FOUNDED 2017

STAFF # + **SEASONAL #**

REVENUE \$M \$0.5 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

GOOD FIZZ



OWNER Verity Tarrant

DESCRIPTION Kombucha, Kefir and fermented sauerkraut company based in Orewa.

KEY PRODUCTS Beverages kombucha and kefir, sauerkraut

BRANDS Good Fizz

OWNERS Tarrant

CO. # 6842037

ADDRESS 444 Hibiscus Coast Highway, Orewa, Auckland

PHONE

WEBSITE

FOUNDED 2018

STAFF # 2 + **SEASONAL #**

REVENUE \$M \$0 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

GOODBUZZ BEVERAGE CO



MANAGING DIRECTOR Alex Campbell

DESCRIPTION Manufacturer of Kombucha based in Tauranga.

KEY PRODUCTS kombucha

BRANDS GoodBuzz

OWNERS Campbell 42%, Gatward 33%, Lion NZ 25%

CO. # 5290782

ADDRESS 129a Malene Street, Greerton, Tauranga, Bay of Plenty

PHONE +64 7 543 5126

WEBSITE www.goodbuzz.nz

FOUNDED 2014

STAFF # 8 + **SEASONAL #**

REVENUE \$M \$2 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS Lion acquires 25% in '17, moved operation to Tauranga, kegging line installed '18

GREENLEAF ORGANICS

greenleaf organics

CO-OWNERS C & M Priddy

DESCRIPTION Biogro organic Switchel apple cider vinegar beverage and tonic company based in Auckland.

KEY PRODUCTS Switchel beverage tonics and shots, hemp and cashew milk, Globrews beverage powder

BRANDS Greenleaf Organics

OWNERS Priddy

CO. # 4363318

ADDRESS 326 New North Road, Kingsland, Auckland

PHONE +64 9 379 0817

WEBSITE www.greenleaforganics.co.nz

FOUNDED 2013

STAFF # + **SEASONAL #**

REVENUE \$M \$2 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

GUTSY GOOD FOOD

gutsy.

OWNER Julia Endres

DESCRIPTION Manufacturer of kombucha based in Waikato.

KEY PRODUCTS kombucha beverages

BRANDS Gutsy

OWNERS Endres

CO. # 6112977

ADDRESS 7 Silva Crescent, Hamilton, Waikato

PHONE

WEBSITE www.gutsy.co.nz

FOUNDED 2016

STAFF # 3 + **SEASONAL #**

REVENUE \$M \$0.5 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

HAKANOA HANDMADE DRINKS

HAKANOA

DIRECTOR Rebekah Hay

DESCRIPTION Traditional ginger beer and syrup manufacturers; based in Auckland; contract brewed in Tauranga.

KEY PRODUCTS Ginger beer, chai and cafe syrups, ginger syrups, dressings

BRANDS Hakanoa

OWNERS Hay 62%, King 18%, Hawthorn 10%, Gilkison 10%

CO. # 2375710

ADDRESS c/- Level 2, 161 Manukau Road, Epsom, Auckland

PHONE +64 21 505 225

WEBSITE www.hakanoa-handmade.co.nz

FOUNDED 2009

STAFF # 3 + **SEASONAL #**

REVENUE \$M \$1 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS

HALO WHOLEFOODS



CEO, CO-FOUNDER Richard Skelton

DESCRIPTION Organic flavoured sparkling water sourced from North Island springs.

KEY PRODUCTS flavoured water

BRANDS Isle Organic

OWNERS HT Elos

CO. # 6186156

ADDRESS Level 4, 17 Albert Street, Auckland

PHONE +64 9 222 4572

WEBSITE www.isleorganic.co.nz

FOUNDED 2016

STAFF # 4 + SEASONAL #

REVENUE \$M \$1 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS Expanding across Singapore and Australia

HANSELLS MASTERTON



EXECUTIVE CHAIRMAN Alan Stewart

DESCRIPTION Contract manufacturer specialist based in Masterton, also trading as Hansells (NZ); acquired assets of Finest Foods Products from receivers 2019; acquired Nutralac Nutrition (AU); a fifth of production in Masterton exported to Australia.

KEY PRODUCTS powder blending, powder packing, liquid blending and packing, product development, syrups,

BRANDS Hansells, Kapiti Kitchen, The Goodness, Supreme, Replace, Covert, Plant Pro, Elite, Horleys

OWNERS Stewart 27.5%, Dr Oetker Queen AU 25%, others

CO. # 2777

ADDRESS 160 State Highway 2, RD 11 Masterton, Wairarapa

PHONE +64 6 370 0200

WEBSITE www.hansellsmasterton.co.nz

FOUNDED 1934

STAFF # 62 + SEASONAL #

REVENUE \$M \$20 - \$30m (2019) Est.
Source: Company

HIGHLIGHTS Acquired assets of Finest Foods Products from receivers 2019; acquired Nutralac Nutrition (AU) 2020

HAPI



CO-OWNER Natalia Harrington

DESCRIPTION Premium bottled water manufacturer based in Nelson, supplying New Zealand restaurants and cafes.

KEY PRODUCTS Still water, sparkling water

BRANDS Woter

OWNERS Harrington, Pirc

CO. # 5741427

ADDRESS 126 Trafalgar Street, Nelson

PHONE +64 3 928 0142

WEBSITE www.woter.nz

FOUNDED 2015

STAFF # 4 + SEASONAL #

REVENUE \$M \$0.3 - \$0.7m (2019)
Source: Company

HIGHLIGHTS Silver medal at the 30th Berkeley Springs International Water Tasting completion for packaging and branding out of 720 entries from 16 countries

HAPPY BELLY FERMENTS



OWNER Jo Kempton

DESCRIPTION Manufacturer of water kefir and kombucha beverages.

KEY PRODUCTS Kombucha, Water Kefir

BRANDS Happy Belly Ferments

OWNERS Kempton

CO. # 9429046843838

ADDRESS Greytown, Wairarapa

PHONE +64 21 151 0914

WEBSITE www.happybellyferments.co.nz

FOUNDED 2015

STAFF # 1 + SEASONAL #

REVENUE \$M \$1 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS

HARPOON COFFEE



MANAGING DIRECTOR Arjun Haszard
DESCRIPTION Boutique cold brew coffee company based in Dunedin; wholesaling through Hancocks.

KEY PRODUCTS Ready to Drink and concentrate cold brew coffee

BRANDS Harpoon Cold Brew Coffee

OWNERS Haszard, Rowe, Coxhead

CO. # 5849985

ADDRESS 269A Royal Road
Massey,
Auckland

PHONE +64 210 311 128

WEBSITE www.harpooncoldbrew.co.nz

FOUNDED 2015

STAFF # 3 + SEASONAL #

REVENUE \$M \$0.5 - \$2m (2019) Est.
Source: Coriolis

HIGHLIGHTS

INFINITY LIFESTYLE GROUP NZ

nakd
L U X U R Y



ARTESIAN WATER
New Zealand

CEO Adrian Shaw

DESCRIPTION Bottled water company sourcing water in Otakiri Aquifer, exporting to Singapore, other Asian Countries and Middle East, Lion distribution in NZ.

KEY PRODUCTS bottled water; still, sparkling glass, PET and box

BRANDS Nak'd

OWNERS Infinity Lifestyle Group Pte

CO. # 9429041055885

ADDRESS Otakiri, Whakatane
Bay of Plenty

PHONE +65 9820 6002

WEBSITE www.nakdwater.com

FOUNDED 2015

STAFF # 3 + SEASONAL #

REVENUE \$M \$2 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

JUICE PRODUCTS NEW ZEALAND



CHIEF EXECUTIVE Akira Yabuuchi

DESCRIPTION Manufacturer of fruit and vegetable juices, concentrates, purees, blends; facility in Timaru; export to Asia, USA, AU; processes 70,000t, 70% of NZ carrot crop.

KEY PRODUCTS Carrot and fruit juice concentrate, fruit and vegetable purees, fruit and vegetable pulp

BRANDS

OWNERS Sumitomo Corporation (TYO:8053) via Summit Fresh Foods New Zealand Limited

CO. # 1207153

ADDRESS 55 Sheffield Street,
Washdyke, Timaru,
Canterbury

PHONE +64 3 687 4170

WEBSITE www.jp-nz.com
www.sumitomocorp.co.jp

FOUNDED 1993

STAFF # 36 + SEASONAL # 24

REVENUE \$M \$36m (2019)
Source: AR19

HIGHLIGHTS Acquired by Sumitomo Corp in '14; invested \$1.5m on new aseptic production and puree extraction lines in '15; expanding laboratory facilities in '17; new CEO in '17; Total assets \$55m '19

JUST LIFE GROUP



CEO Tony Falkenstein

DESCRIPTION Enhancing lives' through the supply of Just Water coolers and water to offices and homes as well as Univent ventilation systems and Solatube skylights to homes throughout New Zealand.

KEY PRODUCTS Water coolers, water filters, Univent ventilation, Solatube tubular skylights

BRANDS Just Water, My Wally, Univent, Solatube, Hometech

OWNERS (NZX:JLG) The Harvard Group (Falkenstein family, Malcolm) 69%, others

CO. # 368825

ADDRESS 103 Hugo Johnston Drive,
Penrose,
Auckland

PHONE +64 9 630 1300

WEBSITE www.jlg.co.nz
www.justwater.co.nz
www.univent.co.nz
www.solatube.co.nz

FOUNDED 1989

STAFF # 120 + SEASONAL #

REVENUE \$M \$30m (2020)
Source: Company

HIGHLIGHTS Sold Australian business, Just Water Australia to Waterlogic in '15; acquired bottling plant for \$3.3m in '16; acquired Hometech in '18, ventilation, skylights and attic stairs business, acquired Univent in 2019 to add ventilation product line; shifted head office and warehouse to Auckland from Wellington

KARMA COLA



CO-FOUNDER Chris Morrison

DESCRIPTION Manufacturer of Fairtrade organic craft sodas; sale proceeds go back to Sierra Leone cola growers; supply into hospitality and cafes; manufacturing in NZ & UK; Karma Cola Pty Ltd (AU); Karma Cola UK (UK/EU); exports to 25 countries including Singapore, Macau, Hong Kong, Japan and Taiwan.

KEY PRODUCTS Cola, lemonade, sparkling fruit flavoured waters (cans and bottles)

BRANDS Karma Cola, Lemmy, Gingerella, All Good & Sparkling, Switcher, kombucha

OWNERS Morrison, Cairns, Redden, Coley, others

CO. # 4458783

ADDRESS 72 Williamson Avenue, Auckland

PHONE +64 9 360 9691

WEBSITE www.allgoodorganics.co.nz
www.karmacola.co.nz

FOUNDED 2013

STAFF # 20 + **SEASONAL #**

REVENUE \$M \$10 - \$15m (2019) Est.
Source: *Company*

HIGHLIGHTS Raises over \$100,000/annum for KC Foundation supporting cola nut growers in Sierra Leone; rebranded to Karma Drinks; Drink no evil branding in the UK

KEEP IT REAL



DIRECTOR Kelli-Jo Walker

DESCRIPTION Fermented food and beverage manufacturer based in Auckland, distributing to organic and specialist stores in NZ.

KEY PRODUCTS Wild kefir soda beverages, kraut, kimchi

BRANDS Forage and Ferment

OWNERS Walker and Allen

CO. # 6166403

ADDRESS 272 Clevedon-Kawakawa Road, Clevedon, Auckland

PHONE +64 21 883 562

WEBSITE www.forageandferment.co.nz

FOUNDED 2016

STAFF # 4 + **SEASONAL #**

REVENUE \$M \$0.5 - \$3m (2019) Est.
Source: *Coriolis*

HIGHLIGHTS Winners of the Outstanding NZ Food Producers Awards 2020

KIWI BEVERAGES



MANAGING DIRECTOR David Thexton

DESCRIPTION Locally owned and operated, beverages manufacturer based in Auckland; franchise system for sales and distribution; 12 exclusive brands.

KEY PRODUCTS Juice, beverages, flavoured water, water, energy drinks

BRANDS Rio Gold, Rio Little Fruitti, Dirty Dog Energy, Kiwi Fizz, Frutee Fabulous Fruits, TIKI Guaran Energy, IKON Energize, Crazy Kea Spring Water, Berry Good

OWNERS

CO. #

ADDRESS 4/5 76 Hunua Road, Papakura, Auckland

PHONE 0275 093 381

WEBSITE www.kiwibeverages.co.nz

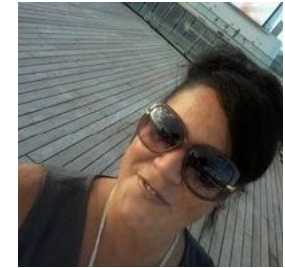
FOUNDED 2019

STAFF # + **SEASONAL #**

REVENUE \$M \$1 - \$5m (2019) Est.
Source: *Coriolis*

HIGHLIGHTS

KIWI KAI NELSON



OWNER Reni Wereta-Gargiulo

DESCRIPTION Specialised food retailing company based in Nelson also owns Atutahi beverages brand using native botanicals; produced by Kombucha Bros.

KEY PRODUCTS Food retailing; RTD adult beverages

BRANDS Atutahi

OWNERS Gargiulo

CO. # 6270510

ADDRESS 41 Halifax Street, Nelson

PHONE +64 21 029 86209

WEBSITE www.atutahi.nz

FOUNDED 2017

STAFF # 5 + **SEASONAL #**

REVENUE \$M \$0.5 - \$1m (2019) Est.
Source: *Coriolis*

HIGHLIGHTS

KIWIFRUIT PROCESSING COMPANY



CO-OWNER Grant Jeffrey

DESCRIPTION Producers of kiwifruit purees and by-products based in Tauranga; products used as ingredient in food and beverage products, pharmaceutical and nutraceutical applications; export to Asia, Europe and the Americas (over 20 countries); multiple Chamber of Commerce and Export Business award winner.

KEY PRODUCTS Green and gold kiwifruit puree, kiwifruit seed, freeze-dried powder

BRANDS Kiwifruitz

OWNERS GB Jeffrey Family Trust, CE & RA Jeffrey

CO. # 1106196

ADDRESS 37 Newnham Road,
Te Puna, Tauranga,
Bay of Plenty

PHONE +64 7 552 5513

WEBSITE www.kiwifruitz.co.nz

FOUNDED 2000

STAFF # 7 + **SEASONAL #** 14

REVENUE \$M \$5 - \$10m (2019) Est.
Source: Coriolis

HIGHLIGHTS Invested in automated pouch line for blast frozen puree in '14; expanded seed exports in '15; expanded puree exports in '16; increasing gold puree export from 2019; organically certified since early 2000's

KOMBUCHA BROS



MANAGING DIRECTOR Brandon Turnage

DESCRIPTION Craft Kombucha beverage company based in Nelson, selling in cans and glass; Atutahi range uses native botanicals; hopped kombucha; also makes hard alcoholic kombucha; ability to service 360,000l/yr.

KEY PRODUCTS Kombucha beverages in 330ml cans and glass at 330mls 1.25L, 2L glass riggers, plus alcoholic kombucha and cocktails

BRANDS Kombucha Bros, Atutahi

OWNERS Turnage and others

CO. # 7454876

ADDRESS 70 Achillies Ave
Nelson

PHONE +64 3 548 2126

WEBSITE www.kombuchabros.co.nz

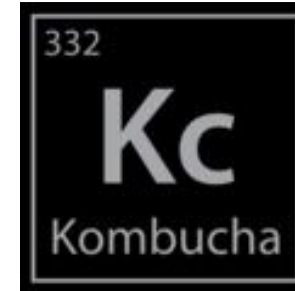
FOUNDED 2019

STAFF # 3 + **SEASONAL #**

REVENUE \$M \$0.5 - \$2m (2019) Est.
Source: Coriolis

HIGHLIGHTS

KOMBUCHA CITY



OWNER Gail Matthew

DESCRIPTION Locally owned and operated artisan kombucha brewery, producing hand crafted beverages. Available in three flavours. Sold online and into retail and hospitality venues. Based in Auckland.

KEY PRODUCTS Kombucha

BRANDS Kc Kombucha

OWNERS Matthew

CO. # 6096015

ADDRESS 15 Dee Place, Torbay
Auckland

PHONE +64 27 488 2934

WEBSITE www.kombuchacity.co.nz

FOUNDED 2016

STAFF # 1 + **SEASONAL #**

REVENUE \$M \$0 - \$1m (2019)
Source: Company

HIGHLIGHTS

LIFEFORCE WATER

Lifeforce Tonics

CO-OWNER Steve Papps

DESCRIPTION Tonic and beverage company.

KEY PRODUCTS Tonics and beverages, minerals, health supplements

BRANDS Lifeforce Tonic, Granite

OWNERS Papps

CO. # 6267852

ADDRESS Hamilton
Waikato

PHONE +64 7 824 8420

WEBSITE www.lifeforcetonics.co.nz

FOUNDED 2017

STAFF # + **SEASONAL #**

REVENUE \$M \$0 - \$2m (2019) Est.
Source: Coriolis

HIGHLIGHTS

LION NZ



MANAGING DIRECTOR Rory Glass

DESCRIPTION Lion NZ is New Zealand's largest alcoholic beverage company; also manufactures other beverages; Wither Hills winery in Marlborough; breweries in Dunedin, Auckland, Christchurch, Wellington; contract bottling plant in Auckland; Liquor King retail stores.

KEY PRODUCTS Beer, wine, spirits, RTDs, cider, seltzer, non alcoholic beverages, kombucha, coffee, water

BRANDS Steinlager, Macs, Panhead, Harrington's, Emerson's, Speights, Little Creatures, The Fermentist, Lion Red, Lion Brown, Waikato Draught, Wither Hills, Lindaeur, Havana, Teza,

OWNERS Kirin (TYO: 2503) via National Foods Holdings & Lion Nathan (AU)

CO. # 33986/ 1035696

ADDRESS 27 Napier Street, Freemans Bay, Auckland

PHONE +64 9 347 2000

WEBSITE www.lionco.com
www.kirinholdings.co.jp
www.drinkscollective.nz

FOUNDED 1860/1968/1977

STAFF # 1,200 + **SEASONAL #**

REVENUE \$M \$617.6m (2018)
Source: AR18 (combined)

HIGHLIGHTS Acquired Havana Coffee Dec '18; acquired 25% share in GoodBuzz Beverage Co in '17; acquired Harrington's Breweries in Jul '18; sold Yoplait assets to Goodman Fielder '18; opened The Fermentist sustainable brewery in ChCh June '18; opened Little Creatures Brewery Hobsonville Feb '19; changed name from Lion - Beer, Spirits & Wine (NZ) to Lion NZ Oct '18; acquired Teza Tea in '19; partnership with Vista water company '19

LITTLE ELEPHANT TONICS



CO-FOUNDER Courtney Rickey

DESCRIPTION Tumeric based tonic beverage shots.

KEY PRODUCTS tonic beverage

BRANDS Little elephant

OWNERS Rickey, Govorko

CO. # 7686896

ADDRESS 25D Ashfield Road, Auckland

PHONE +64 20 4189 4184

WEBSITE www.littleelephant.co

FOUNDED 2019

STAFF # 2 + **SEASONAL #**

REVENUE \$M \$0 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

LIVING DRINKS



DIRECTOR Mark Hamilton

DESCRIPTION Natural kefir soda beverage produced in the Hawkes Bay; 4 flavours.

KEY PRODUCTS kefir soda

BRANDS Redeem

OWNERS Epicurean Dairy Holdings (Epic Nominees 46.5%, Shehav 29%, others)

CO. # 7308096

ADDRESS 119 Lansford Crescent, Avondale, Auckland

PHONE

WEBSITE www.redeemdrinks.com

FOUNDED 2019

STAFF # + **SEASONAL #**

REVENUE \$M \$0.2 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

LOFT FOODS



CO-FOUNDER Michael Wafelbakker

DESCRIPTION Foodservice and contract manufacturing sauces, condiments and beverages for foodservice.

KEY PRODUCTS Sauces, jams, condiments, paste, mayonnaise, relish, soda syrups

BRANDS Loft Kitchen, Spoon,

OWNERS Wafelbakker, Hansen, 74%, The Produce Company 25%

CO. # 5020060

ADDRESS 12 Brigade Road Mangere, Auckland

PHONE +64 9 600 5754

WEBSITE www.loftfoods.co.nz

FOUNDED 2014

STAFF # 28 + **SEASONAL #**

REVENUE \$M \$5 - \$10m (2019) Est.
Source: Coriolis

HIGHLIGHTS

MAKAN DISTILLERS



DIRECTOR Manher Patel

DESCRIPTION Beverage manufacturer; factory in Otahuhu, Auckland.

KEY PRODUCTS Bottled water, carbonated soft drinks, ginger beer, mixers, juice

BRANDS Makan, Flow, Caribrew, GoldRush, Major Phineas Dingleberry's, Starz, Sunrise Juice, WAI Coco Flavoured Water

OWNERS Patel family

CO. # 1137188

ADDRESS 15 Weka Street, Otahuhu, Auckland

PHONE +64 9 276 8185

WEBSITE www.makan.co.nz

FOUNDED 2001

STAFF # 35 + SEASONAL #

REVENUE \$M \$7 - \$12m (2019) Est.
Source: Coriolis

HIGHLIGHTS

MAMA'S BREW SHOP



CO-OWNER Liv McGregor

DESCRIPTION Craft Kombucha and collaboration with Thompson's Victor Gin to produce an alcoholic cocktail in a can with kombucha and gin; based in Helensville.

KEY PRODUCTS Kombucha (bottles and keg) and cocktails in a can

BRANDS Mama's Brew Shop, Happy Hour

OWNERS McGregor, Schliebs

CO. # 6016310

ADDRESS 16 Rautawhiri Road, Helensville, Auckland

PHONE +64 221 549 624

WEBSITE www.mamasbrewshop.com

FOUNDED 2016

STAFF # 2 + SEASONAL #

REVENUE \$M \$0.5 - \$2m (2019) Est.
Source: Coriolis

HIGHLIGHTS

MAMAKU BLUE BERRIES



OWNER Harry and Anne Frost

DESCRIPTION Blueberry and gooseberry farm, orchard and winery with function centre; first established orchard in 1980's; producing blueberry wine.

KEY PRODUCTS Blueberry juice, wine, sauce, jam, fresh, frozen, dried, powder, chocolate bar

BRANDS Mamaku Blue

OWNERS Frost family

CO. # 1054606

ADDRESS 311 Maraeroa Road, RD 1, Rotorua

PHONE +64 7 332 5840

WEBSITE www.mamakublue.co.nz

FOUNDED 2000

STAFF # + SEASONAL #

REVENUE \$M \$m ()
Source:

HIGHLIGHTS

MAURIORA KOMBUCHA



CO-FOUNDER Natalia Kirwan

DESCRIPTION Kombucha beverage company with four flavours, based in Christchurch.

KEY PRODUCTS Kombucha

BRANDS Mauriora Kombucha

OWNERS Kirwan, Gibbs

CO. # 7136673

ADDRESS 414 Woolley Street, Avondale, Christchurch, Canterbury

PHONE

WEBSITE www.mauriorakombucha.nz

FOUNDED 2018

STAFF # + SEASONAL #

REVENUE \$M \$0.5 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

MCCASHIN'S BREWERY



GENERAL MANAGER Scott McCashin

DESCRIPTION Beverages manufacturer based in Nelson; craft beer brewery, cider and non-alcoholic beverages; contract brewing and bottling; tours, restaurant and beer garden; contract brews for Maa Breweries; branch office in Taiwan, 4 staff; McCashin's Distilling Co; oak barrel operations.

KEY PRODUCTS Beer, cider, water, spirits

BRANDS Stoke, Rochdale, 26000 Vodka, The Cut, Palaeo

OWNERS McCashin, Le Gros via Ngakuta Limited

CO. # 2223762

ADDRESS 660 Main Road,
Stoke,
Nelson

PHONE +64 3 547 5357

WEBSITE www.mccashins.co.nz
www.rochdalecider.co.nz
www.stokebeer.co.nz

FOUNDED 2009

STAFF # 50 + **SEASONAL #**

REVENUE \$M \$12 - \$17m (2019) Est.
Source: Coriolis

HIGHLIGHTS McCashin's Brewery Kitchen and Bar opened in '15; launched premium brand Palaeo Water, 14,000-30,000 year old water source, in '16; acquired Liquid Alchemy distilling business in Nov '16, incorporated into McCashin's Distilling Company, produces range of spirits incl. whiskey at brewery; acquired Nelson Cooperage, purchasing, reconditioning, selling oak barrels

MELA



CO-OWNER Brian Belluomini

DESCRIPTION Juice company based in the Wairarapa, pressing and bottling apples, also producing cider and contract bottling juice; juice by apple varieties, all sourced in NZ.

KEY PRODUCTS Bottled apple and fruit juices, 330ml & 2L, cider

BRANDS Mela, Forecast Cider

OWNERS Wright, Belluomini, Vallance, McClure

CO. # 2235353

ADDRESS 112 Ahikouka Road
Greytown,
Wairarapa

PHONE +64 6 304 8012

WEBSITE www.mela.co.nz

FOUNDED 2009

STAFF # + **SEASONAL #**

REVENUE \$M \$3 - \$7m (2019) Est.
Source: Coriolis

HIGHLIGHTS

MILL ORCHARD



CO-OWNERS White family

DESCRIPTION Family owned 60 hectare apple and pear orchard producing fruit concentrates and beverages based in Loburn, Canterbury; distributed exclusively by Awana Sanctuary in Malaysia.

KEY PRODUCTS Fruit juice (250ml, 400ml, 1L, 3L)

BRANDS Mill Orchard

OWNERS White Family

CO. # 1245892

ADDRESS 31 Rossiters Road, Loburn
Canterbury

PHONE +64 3 312 8333

WEBSITE

FOUNDED 2002

STAFF # 7 + **SEASONAL #** 10

REVENUE \$M \$2 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

MONAVALLE BLUEBERRIES



GENERAL MANAGER Marco de Groot

DESCRIPTION Organic blueberry farm over 44 hectares supplying fresh and frozen, powdered and processed blueberry food products, cafe onsite; 30 varieties harvest November to May.

KEY PRODUCTS Fresh and frozen organic blueberries, organic blueberry juices, wine, powder

BRANDS Monavale Organic Blueberries

OWNERS De Groot and Banks families

CO. # 1241909

ADDRESS 178 Turkington Road, Monavale,
Cambridge,
Waikato

PHONE +64 0800 4 23774

WEBSITE www.monavaleblueberries.co.nz

FOUNDED 1985/2002

STAFF # 12 + **SEASONAL #** 120

REVENUE \$M \$m ()
Source: Coriolis

HIGHLIGHTS BioGro certified for 35 years, punnets use recyclable PET

MOTHER AND DAUGHTER



OWNER Barbara East

DESCRIPTION Premium cordial manufacturer based in Wanaka.

KEY PRODUCTS Cordial and sparkling ready to drink soda

BRANDS Mother & Daughter

OWNERS East and Rawlings

CO. # 6108831

ADDRESS 1 Hollyhock Lane
Wanaka,
Otago

PHONE +64 27 355 2431

WEBSITE www.motheranddaughter.co.nz

FOUNDED 2016

STAFF # 2 + SEASONAL #

REVENUE \$M \$0.2 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

NATURALLY PURE NEW ZEALAND



CEO Brett Tucker

DESCRIPTION Artesian water bottling company based in TaiTapu, Canterbury. Producing branded and private label bottles and boxes; also consents to take water at multiple locations around NZ.

KEY PRODUCTS Water bottled, boxed, bulk bladders

BRANDS Pure Waters of New Zealand, Aquazeal, SpringFresh

OWNERS Kittow, Sinclair, McHardy, others

CO. # 2237440

ADDRESS 364 Barnes Road, Tai Tapu,
Canterbury

PHONE +64 3 329 6442

WEBSITE www.naturallypurenz.com

FOUNDED 2009

STAFF # + SEASONAL #

REVENUE \$M \$2 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

NEKTA NUTRITION



MANAGING DIRECTOR Adriana Tong

DESCRIPTION Specialist beverage manufacturer; specialising in kiwifruit and health beverages; manufacturing plant in Auckland; exports to China, UK, HK, Malaysia, Australia, Pacific.

KEY PRODUCTS Kiwifruit juices, blackcurrent juice, yoghurt powder mix, probiotics, colostrum powder

BRANDS Nekta, Liquid Kiwifruit, Liquid Kiwi, Yoghurt Mix

OWNERS Tong family 95%, Alpha Group 5%

CO. # 1981447

ADDRESS 7 Hautu Drive,
Wiri,
Auckland

PHONE +64 9 250 2789

WEBSITE www.nekta.com
www.newnekta.com

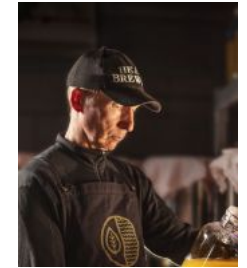
FOUNDED 1993

STAFF # 6 + SEASONAL #

REVENUE \$M \$3 - \$5m (2019) Est.
Source: Company

HIGHLIGHTS Supplier of beverage and cocktail mix to Cathay Pacific First and Business Class; 2020 brand refresh to focus on probiotic and digestive benefits

NEW LEAF KOMBUCHA



CO-FOUNDER Derek Hillen

DESCRIPTION Auckland based small batch brew organic manufacturer of kombucha; onsite taproom.

KEY PRODUCTS Kombucha beverages

BRANDS New Leaf

OWNERS Hillen Family

CO. # 6492733

ADDRESS 37 Crummer Road,
Grey Lynn,
Auckland

PHONE +64 9 360 0199

WEBSITE www.newleafkombucha.nz

FOUNDED 2017

STAFF # 3 + SEASONAL #

REVENUE \$M \$0.2 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS New Zealand's first pure kombucha taproom.

NEW ZEALAND ARTESIAN WATER

E'STEL

CEO Andrew Strang

DESCRIPTION Water company based in Nelson, premium bottles plus sports bottle; still and sparkling; own modern plastic blow mould facility on-site; exporting to Australia, Caribbean, Qatar.

KEY PRODUCTS Bottled water, boxed water, glass and RPET

BRANDS E'stel

OWNERS Punakiki Fund, Strang, McLeod, Wood, Herring, others

CO. # 4766339

ADDRESS 93 Beatty Street, Annesbrook, Nelson

PHONE 64 3 547 2840

WEBSITE www.estel.nz

FOUNDED 2019

STAFF # 35 + SEASONAL #

REVENUE \$M \$5 - \$10m (2019) Est.
Source: Coriolis

HIGHLIGHTS In process to switching all bottles to 100% RPET (recycled plastic)

NEW ZEALAND MIRACLE WATER



CEO Xinghong Ju

DESCRIPTION Bagged water manufacturer in a food grade aseptic manufacturing facility based in the Hawkes Bay; consent to take 670,000m³/yr; opened 2015; plans to export water to China.

KEY PRODUCTS bagged water, boxed water

BRANDS Hawkes Bay Water, HB Water

OWNERS Xinghong Ju (94%), NZ Spring International (CN; 6%)

CO. # 5723130

ADDRESS 145 Elwood Road, Waipatu Hastings, Hawke's Bay

PHONE +64 6 651 1991

WEBSITE www.nzmiracle.com

FOUNDED 2015

STAFF # 26 + SEASONAL #

REVENUE \$M \$1 - \$10m (2018) Est.
Source: Coriolis

HIGHLIGHTS Recently established New Zealand New Water Ltd

NEW ZEALAND QUALITY WATERS



DIRECTOR Magdaline Wee

DESCRIPTION Producers and exporters of premium spring water based beverages; water source is Blue Spring in Putaruru plus artesian water; bottling plant at source; contract bottling service; offices in Australia, Thailand, Hong Kong.

KEY PRODUCTS Still, lightly flavoured spring water beverages

BRANDS NZO Volcanic Spring Water, WAIZ

OWNERS NZO International 51%, Wee 49%

CO. # 1886777

ADDRESS 83 Domain Road, Putaruru, Waikato

PHONE +64 7 883 8499

WEBSITE www.nzqw.co.nz

FOUNDED 2006

STAFF # 20 + SEASONAL #

REVENUE \$M \$6 - \$8m (2016)
Source: Company supplied

HIGHLIGHTS Brand refresh and new packaging in '16; planned expansion of exports to Australia and Singapore; website updated in '17; currently undergoing significant plant reorganisation with expected complete Jun '17

NO UGLY

NO UGLY

CO-FOUNDER Jo Taylor

DESCRIPTION Wellness tonic beverage and cocktail manufacturer based in Auckland; supplied in glass and cans; developed in conjunction with FoodBowl.

KEY PRODUCTS Beverages and fruit tonic

BRANDS No Ugly, Denzien Gin

OWNERS Taylor, Underdown, others

CO. # 6382934

ADDRESS 41B Napier Street, Freemans Bay, Auckland

PHONE

WEBSITE www.nougly.nz

FOUNDED 2017

STAFF # 5 + SEASONAL #

REVENUE \$M \$1 - \$2m (2019) Est.
Source: Coriolis

HIGHLIGHTS Collaboration with Denzien Gin

NORTON ROAD ORGANICS AT 948



DESCRIPTION Organic produce and juice company based in the Hawkes Bay; Juice retailed at select organic stores across New Zealand.

KEY PRODUCTS Fruit, vegetables, Bottled juice beverages

BRANDS Norton Road Organics

OWNERS

CO. #

ADDRESS 948 Norton Road, Hasting, Hawke's Bay

PHONE +64 6 876 5671

WEBSITE www.nortonroadorganicsat948.business.site

FOUNDED

STAFF # + **SEASONAL #**

REVENUE \$M \$2 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

NZ DRINKS



CEO Tony Vesper

DESCRIPTION Bottled water manufacturer; dedicated, hi-tech automated water bottling facility sourcing water from site; currently 100m+ bottles for domestic market; capacity for 32,000 bottles/hr = 220m bottles/yr; private label plus branded production.

KEY PRODUCTS Still, sparkling bottled water, soda water, tonic water, ginger ale, etc.

BRANDS Pure NZ, Endeavour Drinks

OWNERS Osborne family 35.6%, Vesper 35.6%, others

CO. # 2463189

ADDRESS 2 Yashili Drive, Pokeno, Auckland

PHONE +64 9 276 2666

WEBSITE www.nzdrinks.co.nz

FOUNDED 2010

STAFF # 40 + **SEASONAL #**

REVENUE \$M \$25 - \$30m (2019) Est.
Source: Coriolis

HIGHLIGHTS \$7m upgrade to production line in '18, enabling use of recycled plastic

NZ JUICE GROUP



MANAGING DIRECTOR Owen Park

DESCRIPTION Juice processor; based in Hastings; exports to China and Taiwan.

KEY PRODUCTS Juice (orange, apple, kiwi, feijoa, pear, wild berry, peach, carrot and beetroot) in 250ml and 1L glass bottles

BRANDS NZ Natural Juice

OWNERS Zhang 70%, Zheng 30%

CO. # 4002138

ADDRESS 3 Railway Road, Whakatu, Hastings, Hawke's Bay

PHONE +64 6 870 1363

WEBSITE www.nzjuice.co.nz

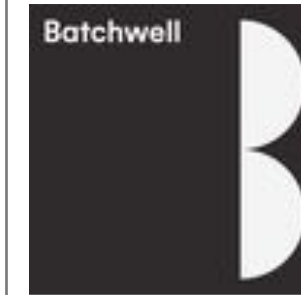
FOUNDED 2012

STAFF # 9 + **SEASONAL #**

REVENUE \$M \$4 - \$6m (2019) Est.
Source: Coriolis

HIGHLIGHTS Recent investment in automation and plant efficiencies

OLBIES



GENERAL MANAGER Michael Tutty

DESCRIPTION Kombucha beverage manufacturer, Biogro certified organic, also using cold-pressed organic fruits & vegetables; distributed across New Zealand; subscription service.

KEY PRODUCTS Kombucha RTD beverages

BRANDS Batchwell

OWNERS Old, Darby, Toop

CO. # 6125927

ADDRESS 22C Fairfax Avenue, Penrose, Auckland

PHONE +64 21 617 703

WEBSITE www.batchwell.com

FOUNDED 2016

STAFF # + **SEASONAL #**

REVENUE \$M \$3 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

ONE PURE INTERNATIONAL



GENERAL MANAGER Grant Verry

DESCRIPTION Water manufacturer producing still and sparkling water from the Heretaunga Plains in Hawke's Bay; consent to take 405,000m³/yr.

KEY PRODUCTS water still and sparkling, glass, pet, box

BRANDS OnePure

OWNERS Wang (CN, 75%), Kang (NZ, 25%)

CO. # 3986438

ADDRESS 114/191 Queen Street,
Crombie Lockwood Tower,
Auckland

PHONE +64 9 373 4476

WEBSITE www.onepure.co.nz

FOUNDED 2012

STAFF # 10 + **SEASONAL #**

REVENUE \$M \$5 - \$10m (2019) Est.
Source: Coriolis

HIGHLIGHTS

ORAVIDA NZ



MANAGING DIRECTOR Julia Xu

DESCRIPTION Producer, processor, exporter and marketer; select premium New Zealand food and beverage products to China; multiple sales channels including ecommerce and own retail store in Shanghai; Oravida Waters water manufacturing facility.

KEY PRODUCTS bottled water, milk, yoghurt, ice cream, cherries, honey, seafood, lamb, wine

BRANDS Oravida, Oravida New Zealand Artesian Water

OWNERS Kauri NZ Investment Ltd

CO. # 2356805/5631588

ADDRESS 3rd Floor, 139 Quay Street,
Auckland

PHONE +64 9 379 7308

WEBSITE www.oravida.com

FOUNDED 2011

STAFF # 17 + **SEASONAL #**

REVENUE \$M \$m ()
Source:

HIGHLIGHTS Successfully procuring and exporting a range of premium NZ products throughout China; forging strong relationships with supply channels and working alongside premium NZ food brands; obtained a Certificate of Recognition from NZ Story in addition to becoming a member of the New Zealand FernMark Licence.

OSOM FOODS



FOUNDER Abheek Patell

DESCRIPTION Ayurvedic prebiotic functional beverage, produced in Auckland.

KEY PRODUCTS Functional water beverage

BRANDS Osom

OWNERS Patel

CO. # 6446092

ADDRESS 27 Coronation Road, Mangere Bridge,
Auckland

PHONE +64 0800 827 466

WEBSITE https://osom.co.nz

FOUNDED 2017

STAFF # 2 + **SEASONAL #**

REVENUE \$M \$0 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS NZ Artisan Awards Finalist, 2018; Singapore Labels and Packaging Award- Gold, 2019

OTAKIRI SPRINGS

OTAKIRI

MANAGING DIRECTOR Jim Robertson

DESCRIPTION Bottle water manufacturer; based in Whakatane.

KEY PRODUCTS Bottled water, still and sparkling

BRANDS Otakiri 932

OWNERS Young family 42%, Ker 13%, Whyte family, Gray 13%, others

CO. # 645828

ADDRESS 57 Johnson Road,
Whakatane,
Bay of Plenty

PHONE +64 7 322 8107

WEBSITE www.otakirisprings.com

FOUNDED 1994

STAFF # 8 + **SEASONAL #**

REVENUE \$M \$1 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS Sale to Creswell NZ (Nongfu, CN) proposed and expansion plans in pipeline, resource consent granted for 1 billion litres (up from 438m)

PACIFIC ROOTS



CO-FOUNDER Zbigniew Dumienki

DESCRIPTION Ready to drink green kava beverage from fresh kava roots, co-developed at the FoodBowl in Auckland; traditional ceremonial drink of the Pacific Islands.

KEY PRODUCTS RTD kava beverage

BRANDS Pacific Roots Kava

OWNERS Munsell, Dumienki

CO. # 7408696

ADDRESS Suite 3a 153 Stoddard Road,
Mount Roskill,
Auckland

PHONE

WEBSITE www.pacificrootskava.com

FOUNDED 2019

STAFF # + **SEASONAL #**

REVENUE \$M \$0.5 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS

PARKERS BEVERAGE COMPANY

PARKERS
BEVERAGE COMPANY



MANAGING DIRECTOR Doug Speedy

DESCRIPTION Beverage company producing a wide range of waters, juices etc; cold pressed apple plant producing apple for juices; based in Hawke's Bay.

KEY PRODUCTS Bottled, canned and cask water, wine, beer, aloe vera juice, coffee, juice

BRANDS Parkers, O Pure, Pure plus, 1835 Single Origin Coffee, Devine, Deco City, ABCD, Travelmate

OWNERS Speedy family 38%, Johnstone 27%, McAleese 15%, Walsh family, Campbell family 15%, Clark 3%, Davis 2%

CO. # 5359761

ADDRESS 38 Whakatu Road,
Hastings,
Hawke's Bay

PHONE +64 21 145 9609

WEBSITE www.parkers.kiwi

FOUNDED 2014

STAFF # 12 + **SEASONAL #** 10

REVENUE \$M \$4 - \$7m (2019)
Source: Company

HIGHLIGHTS Consent to take 140,000m3 water from Hawke's Bay; Invested in glass line; largest seller of 10L water in NZ; recently developed Collagen water in partnership with Adashiko and marketing campaign with Rachel Hunter; only NZ producer of still canned water (fully recyclable)

PETE'S NATURAL



JOINT CEO'S Peter & Marlene Bloomart

DESCRIPTION Boutique soft drink manufacturer; based in Nelson.

KEY PRODUCTS Soft drinks, sparkling water

BRANDS Pete's Natural

OWNERS Blommart, Suy

CO. # 2266470

ADDRESS 32 Hau Road,
Motueka,
Nelson

PHONE +64 21 078 5758

WEBSITE www.petesnatural.co.nz

FOUNDED 2009

STAFF # 5 + **SEASONAL #**

REVENUE \$M \$1 - \$5m (2019) Est.
Source: Company

HIGHLIGHTS

PHORIC

phoric

CO-OWNER Bradley Hagan

DESCRIPTION "Clean" Energy Drink manufacturers using 100% natural ingredients, manufactured in Tauranga.

KEY PRODUCTS Energy Drink

BRANDS Phoric

OWNERS Hagan & Sutich

CO. # 5722608

ADDRESS 194 Kauri Road, Whenuapai,
Auckland

PHONE

WEBSITE <https://www.phoric.co.nz>

FOUNDED 2015

STAFF # 2 + **SEASONAL #**

REVENUE \$M \$0 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

PLIMMERTON KOMBUCHA



OWNER Heidi Ward

DESCRIPTION Kombucha beverage company based in Porirua, Wellington.

KEY PRODUCTS Kombucha ready to drink beverages

BRANDS Plimmerton

OWNERS Ward

CO. #

ADDRESS 3/51 Kenepuru Drive, Porirua, Wellington

PHONE +64 21 588 373

WEBSITE www.plimmertonkombucha.co.nz

FOUNDED 2017

STAFF # 3 + **SEASONAL #**

REVENUE \$M \$0 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

PREMIUM WATERS



CO-OWNER Ryan O'Connell

DESCRIPTION Middle Earth brand and website covering wine, cider and bottled water companies based in Brightwater, Nelson, (three separate firms).

KEY PRODUCTS bottled water (still and sparkling, 300ml & 750ml), cider (canned), wine (bottles and cans)

BRANDS Middle-Earth, Bright Water, no ordinary (bubbly wine in a can), Capital Cider Company,

OWNERS Grey, O'Connell

CO. # 5094242

ADDRESS 97 Livingston Road, Brightwater, Nelson

PHONE +64 3 542 4145

WEBSITE www.middleearthwine.com

FOUNDED 2014

STAFF # + **SEASONAL #**

REVENUE \$M \$5 - \$10m (2019) Est.
Source: Coriolis

HIGHLIGHTS

PROFRUIT (2006)



GENERAL MANAGER Chantelle Ramage

DESCRIPTION Manufacturer of high quality juice products from the Hawke's Bay; primarily focused on exporting concentrated apple and kiwifruit juice; partnership between two vertically integrated apple companies, Mr Apple (Scales) and Bostock NZ.

KEY PRODUCTS apple juice, kiwifruit juice, organic juice

BRANDS Profruit

OWNERS Scales Holdings 50%, Bostock Group, 50%

CO. # 1811223

ADDRESS 1462 Omahu Road, Hastings, Hawkes Bay

PHONE +64 6 879 4215

WEBSITE www.profruit.co.nz

FOUNDED 2006

STAFF # 35 + **SEASONAL #**

REVENUE \$M \$3 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

PURE ONE



CO-OWNER Coral Lambert

DESCRIPTION Bottle water manufacturer; based in New Plymouth, Taranaki; thermal spa and accommodation operations.

KEY PRODUCTS Bottled water

BRANDS Pure One

OWNERS Fahy 51%, Lambert 49%

CO. # 926829

ADDRESS 8 Bonithon Avenue, New Plymouth, Taranaki

PHONE +64 6 759 1666

WEBSITE www.pureone.co.nz

FOUNDED 1998

STAFF # + **SEASONAL #**

REVENUE \$M \$1 - \$2m (2019) Est.
Source: Coriolis

HIGHLIGHTS

RED SHOOTS



CO-OWNER Rhona MacKenzie

DESCRIPTION Artesian beverage company producing cocktail mixers based in Auckland; supply supermarkets, liquor stores and Dan Murphy's in Australia; bottle and foil packaging; also produce Lemonfresh, lemon and lime pouches.

KEY PRODUCTS juice mixers

BRANDS Good Cocktail Co, Lemon Fresh

OWNERS MacKenzie, Sweetbaum

CO. # 6257347

ADDRESS 11 Alberton Street, Auckland

PHONE

WEBSITE www.goodcocktailco.co.nz
www.redshoots.co.nz
www.w.lemonfresh.co.nz

FOUNDED 2018

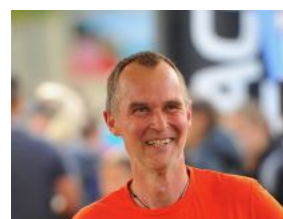
STAFF # 6 + **SEASONAL #**

REVENUE \$M \$1 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS

RENE'S KOMBUCHA

rené's
KOMBUCHA
CULTURED TEA DRINK
- with tulsi -



OWNERS R Archner & L Miller

DESCRIPTION Certified organic (OFNZ) craft Kombucha manufacturer. Family owned and operated in Northland. Glass/cardboard packaging and reusable 19l kegs.

KEY PRODUCTS 5 flavours of organic Kombucha in glass bottles, 330ml and 750ml. Kombucha starter kits. Bulk Kombucha for refill stations and hospitality in 19l kegs, 7 flavours

BRANDS Rene's

OWNERS Vibrant Earth Creations (Miller, Archner)

CO. # 2272291

ADDRESS 281A Mountain Road, Maungaturoto, Northland

PHONE +64 9 431 8871

WEBSITE www.reneskombucha.com

FOUNDED 2013

STAFF # 2 + **SEASONAL #** 1

REVENUE \$M \$0.2 - \$1m (2019)
Source: Company

HIGHLIGHTS Voted by Metro magazine in 2019 as one of NZ's best Kombuchas. Supplying New Zealanders from Dunedin to Whangarei with a traditionally brewed and bottled craft Kombucha. Completely natural and traditional Kombucha without food technology acrobatics.

SCALES CORPORATION

Scales
growing New Zealand



MD & CEO Andy Borland

DESCRIPTION Diversified agribusiness portfolio, including horticulture, storage & logistics and food ingredients across 35+ sites; Mr Apple is NZ's largest vertically integrated grower, packer and exporter of apples; 1,160ha of orchards; 3 packhouses, 5 coolstores; picks 500m apples; 25% share of NZ total apple exports to over 40 countries; 50% ownership of Profruit 73% ownership of Fern Ridge.

KEY PRODUCTS Apples, apple and kiwifruit juice concentrate, pet food ingredients, provision of cold, bulk liquid and logistics services

BRANDS Mr Apple, Diva, Dazzle, Posy, Little Darlings, Fern Ridge Fresh, Profruit, Meateor Foods

OWNERS (NZX:SCL) China Resources Nu Fung 15%, others

CO. # 424743

ADDRESS 52 Cashel Street, Christchurch, Canterbury

PHONE +64 3 379 7720

WEBSITE www.scalescorporation.co.nz
www.mrapple.co.nz
www.meateor.co.nz

FOUNDED 1897

STAFF # 715 + **SEASONAL #** 1,800

REVENUE \$M \$485m (2019)
Source: AR (Hort \$264m, Ingrid \$155m)

HIGHLIGHTS Packed 4.7m trays of fruit; 5.95m trays of apples exported; 18% share of NZ production; 6.2m litres of juice sold '19; 110,970t petfood ingredients sold; EBIT \$62m '19; launched Posy apple in Chinasold Polarcold company for \$151.4m in '18; sold bulk storage business Liqueo to SBT Group in '18; Alliance acquired 50% Meateor, formed JV '19; Dec '18 acquired 60% Shelby Foods (petfood ingredients)

SHOTT BEVERAGES



CEO David Shearer

DESCRIPTION Beverage flavouring manufacturer; manufactured in Wellington and second site in Auckland; exports to Europe, UK, Asia, Australia, Pacific Islands; offices in Seoul, Sydney and Surrey, UK.

KEY PRODUCTS Beverage flavourings syrups, coffee syrups, hot chocolate

BRANDS Shott Beverages, Quarter Past

OWNERS Beverage Holdings 75%, Louisson family, Brierley 13%, Jarden Custodians 7%, Shearer 5%

CO. # 1757190

ADDRESS 10 Kirkcaldy Street, Petone, Wellington

PHONE +64 4 568 8701

WEBSITE www.shottbeverages.com
www.quarterpast.com

FOUNDED 2006

STAFF # 37 + **SEASONAL #**

REVENUE \$M \$10 - \$20m (2019) Est.
Source: Company

HIGHLIGHTS Finalists in the 2018 Fine Food New Zealand Most Innovative Foodservice Product category; Opened new manufacturing facility in Auckland.

SKINNY FIZZ COMPANY



DIRECTOR Shawn Beck

DESCRIPTION New Zealand fruit infused sparkling water company

KEY PRODUCTS Fruit flavoured sparkling water canned beverages

BRANDS Skinny Fizz

OWNERS Beck, key staff, others

CO. # 6475919

ADDRESS 4 Jackson Street, Petone, Wellington

PHONE +64 27 529 6889

WEBSITE www.skinnyfizz.co.nz

FOUNDED 2018

STAFF # 5 + SEASONAL #

REVENUE \$M \$0.5 - \$2m (2019)
Source: Company

HIGHLIGHTS First released Dec 2018, Skinny Fizz is different. Made with real fruit extracts from New Zealand lemons, limes and raspberries. No "natural flavours", or anything else. Ranged in select NZ supermarkets, up-market food retail and cafe/food outlets, growing online store. Founded by ex-VC partner, part owned by staff, ESG focused. Trademarked in circa 10 key countries.

SOULFRESH NZ



FOUNDER & CEO Didi Lo

DESCRIPTION Soulfresh is a food and beverage company like no other, dedicated to challenging mainstream categories by creating healthy, better-for-you food and beverages for over 16 years. Manufacturing almond milk and chocolate in AU and kombucha in AU, NZ and UK; manufacturing based in Tauranga.

KEY PRODUCTS Kombucha, Plant milk, Chocolate, Alcoholic kombucha, Plant-based convenience meals

BRANDS Lo Bros, Nutty Bruce, Bootleg Booch, The Goods, Wildly Good, Pico, Naked Botanicals

OWNERS Soulfresh Global PTY Ltd (AU)

CO. # 6175887

ADDRESS Unit F2 28-30 Delta Ave, New Lynn, Auckland

PHONE +64 0800 113 737

WEBSITE <https://soulfresh.co>
<https://lobros.co>

FOUNDED 2003/2016

STAFF # 15 + SEASONAL #

REVENUE \$M \$5 - \$10m (2019) Est.
Source: Coriolis

HIGHLIGHTS Introduced LoBros Kombucha cans in late 2019; Launched Bootleg Booch Alcoholic Kombucha in early 2020

SOVIET SPRINGS



CO-OWNER Joseph Slater

DESCRIPTION Premium carbonated soda and soda syrup manufacturer; manufacturing in Wellington. supply retail (supermarket and select), wholesale, foodservice; 6 distributors in NZ and 4 international distributors (USA/Canada, AUS, HK).

KEY PRODUCTS Premium syrups, bottled soda beverages

BRANDS Six Barrels Soda Co

OWNERS Stewart 50%, Slater 50%

CO. # 2161660

ADDRESS Lukes Lane, 40 Taranaki Street, Te Aro, Wellington

PHONE +64 22 077 9553

WEBSITE www.sixbarrelsoda.co

FOUNDED 2008

STAFF # 6 + SEASONAL #

REVENUE \$M \$1 - \$3m (2019)
Source: Company

HIGHLIGHTS

SPARKLING SPRING



CEO George Putilin

DESCRIPTION Water and cooler company for home and office, plus large retail bottles sourced from Tongariro.

KEY PRODUCTS Bottled water, coolers, delivery

BRANDS Tongariro

OWNERS Sparkling Spring OY 70%, Eco Beverage 30%

CO. # 2140649

ADDRESS 118C Bush Road, Albany, Auckland

PHONE +64 9 415 0953

WEBSITE www.sparklingspring.co.nz

FOUNDED 2008

STAFF # + SEASONAL #

REVENUE \$M \$5 - \$10m (2019) Est.
Source: Coriolis

HIGHLIGHTS

STRATOSPHERE



CEO-FOUNDER Cameron Romeril

DESCRIPTION Marketing and manufacturing of Premium and innovative Organic low sugar Syrups and Kombucha concentrates for SodaStream makers and for Foodservice. Now exporting to the USA, Canada, Japan, UK and Ireland, Singapore, Finland and Sweden.

KEY PRODUCTS Organic Soda Syrups; Kombucha Concentrate

BRANDS Soda Press Co

OWNERS Romeril family; Soda Stream

CO. # 1790052

ADDRESS 2/38 Matakana Valley Road
Matakana,
Auckland

PHONE +64 3 2653 444

WEBSITE www.sodapressco.com

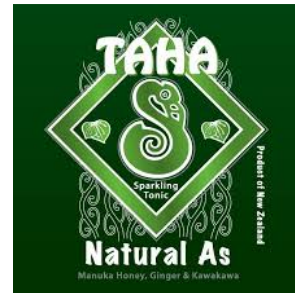
FOUNDED 2015

STAFF # 5 + SEASONAL #

REVENUE \$M \$6 - \$8m (2019)
Source: Company

HIGHLIGHTS Added kombucha syrup to range; World first Organic Kombucha concentrate; Partnership with SodaStream 19; Global rollout with Sodastream and PepsiCo. Projected revenue of \$50m in 2023; Winner of numerous international awards

TAHA BEVERAGES



CEO & MD Richard Te Hurinui Jones

DESCRIPTION Kawakawa, ginger & manuka honey flavoured sparking beverage brand; based in Otorohanga; hand-pick kawakawa plant; distribution and sales partner in Hong Kong; distribution through NZ retailers (Fresh Choice, New World, Pak'n Save) plus tourist outlets, café, restaurants and bars; contract manufactured.

KEY PRODUCTS Sparkling tonic beverage

BRANDS Taha

OWNERS Jones 85%, Harman 15%

CO. # 2442746

ADDRESS 8 Long View Crescent,
Otorohanga,
Waikato

PHONE +64 21 619 075

WEBSITE www.taha.nz

FOUNDED 2010

STAFF # 1 + SEASONAL #

REVENUE \$M \$0.5 - \$1.5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

THE ANTIPODES WATER COMPANY



CEO Angela Buglass

DESCRIPTION Premium bottled water manufacturer; distributors in 18 locations throughout Asia, ME, Europe and USA; supply to retail, hospitality, foodservice, caterers, direct delivery etc.; built new plant in 2009, capacity of 75,000 bottles/day, rated carbon neutral; pioneer of premium bottle water in NZ.

KEY PRODUCTS Still and sparkling bottled water

BRANDS Antipodes

OWNERS Woolley family, Shanks 42%, Greive 25%, Thorpe family, Goldie 20%, Goldie family 7%, Cheeseman 6%

CO. # 1292968

ADDRESS 106 Lewis Road,
Whakatane,
Bay of Plenty

PHONE +64 7 304 8452

WEBSITE www.antipodes.co.nz

FOUNDED 2003

STAFF # 11 + SEASONAL #

REVENUE \$M \$5 - \$10m (2019) Est.
Source: Coriolis

HIGHLIGHTS Awarded champion sparkling water at The 28th Berkeley Springs International Water Tasting and Awards in '18; new CEO in May '19

THE BETTER DRINKS CO



GENERAL MANAGER James Connelly

DESCRIPTION Manufacturer, marketer and distributor of beverages; production sites in NZ and AU; distribution rights for Lipton Iced Tea and Berocca Energy Products in NZ; Pacific Islands; exports to over 12 countries.

KEY PRODUCTS Juice, Soft Drinks, Iced tea, Energy Drinks, Water

BRANDS Charlie's, Phoenix Organics, Lipton Iced Tea, Cool Ridge, Juicy Lucy's

OWNERS Asahi Group via Asahi Holdings (AU)

CO. # 969423

ADDRESS Suite 101, 1 Cleveland Road,
Parnell,
Auckland

PHONE +64 9 837 6740

WEBSITE www.betterdrinks.co.nz
www.asahi.com.au
www.phoenixorganics.co.nz

FOUNDED 1999

STAFF # 100 + SEASONAL #

REVENUE \$M \$28m (2018)
Source: AR18

HIGHLIGHTS Exclusive distribution rights announced in 2019 for Lipton Iced Tea; Total assets of \$25m

THE BEVERAGE BOUTIQUE



OWNER Dion Mortimer

DESCRIPTION Artesian water company based in Paeroa, (head office in Auckland); manufacturing, development, production, export and sales of private label water; exporting globally.

KEY PRODUCTS bottled water

BRANDS private label

OWNERS Mortimer

CO. # 3471331

ADDRESS Paeroa,
Waikato

PHONE +64 9 376 8999

WEBSITE www.thebeverageboutique.co.nz

FOUNDED 2011

STAFF # 29 + **SEASONAL #**

REVENUE \$M \$5 - \$10m (2019) Est.
Source: Coriolis

HIGHLIGHTS

THE BROTHERS COLDPRESS



CO-OWNER Roger Young

DESCRIPTION Artisan juice company based in Wellington.

KEY PRODUCTS Bottled juice beverages

BRANDS The Brothers

OWNERS Wagstaff, Young

CO. # 5862002

ADDRESS 2/19 Arthur Street,
Te Ari,
Wellington

PHONE

WEBSITE www.thebrotherscoldpress.com

FOUNDED 2015

STAFF # + **SEASONAL #**

REVENUE \$M \$1 - \$3m (2019) Est.
Source: Coriolis

HIGHLIGHTS

THE FRESH FRUIT COMPANY OF NZ



GENERAL MANAGER Glenn Pool

DESCRIPTION Vertically integrated fresh fruit and vegetable exporter; 4,000 TEU container equivalent/year; orchards in Nelson and Hawkes Bay; JV Freshco Nelson Ltd with apple growers; JV to export squash to Japan and Korea; sole marketer for Tendertips Asparagus and partner with Leaning Rock Cherries (52 acres, 15 varieties); subsidiary Three Good Men grow and pack from three partners over 1,000ha, exporting 20,000t; Frupak processed apple products operations.

KEY PRODUCTS Apples, squash, asparagus, cherries, fruit puree, apple juice, fruit pie mixes

BRANDS Breeze, Sonya, Cheekie, Royal Joburn, proprietary apple varieties, Frupak, Three Good Men

OWNERS Taylor, Owens 45%, Mangan, Petter 45%, Pool family 10%

CO. # 412966

ADDRESS 46 Jervois Road,
Herne Bay,
Auckland

PHONE +64 9 376 9990

WEBSITE www.freshco.co.nz
www.threegoodmen.co.nz
Frupak.co.nz

FOUNDED 1988

STAFF # 95 + **SEASONAL #**

REVENUE \$M \$30 - \$50m (2018) Est.
Source: Coriolis

HIGHLIGHTS Acquired Frupak in '17; established Three Good Men specialising in squash

THE HOMEGROWN JUICE COMPANY



DIRECTOR Stephen Brownlie

DESCRIPTION Manufacturer of raw cold pasteurised (HPP) juices; largest plantings of orange orchards in NZ, located in Gisborne and Hawkes Bay; retail and food service.

KEY PRODUCTS Orange, apple, grapefruit, lemon, lime, apple and kale juices, fruit and vegetable blend juices, berry, fruit, feijoa and apple smoothies

BRANDS Homegrown, Grove

OWNERS Kiwi Fresh Orange Co (Brownlie family)

CO. # 4387684

ADDRESS 407 Williams Street,
Mahora, Hastings,
Hawke's Bay

PHONE +64 6 878 8140

WEBSITE www.homegrownjuice.co.nz

FOUNDED 2013

STAFF # 80 + **SEASONAL #**

REVENUE \$M \$15 - \$30m (2019) Est.
Source: Coriolis

HIGHLIGHTS

THE KVAS COMPANY



FOUNDERS Jack & Sabina Bristow

DESCRIPTION Manufacturers of fermented rye beverage based in Christchurch; brewed under license in Australia and the UK.

KEY PRODUCTS Kvas chilled beverage

BRANDS Brod Kvas

OWNERS Bristows

CO. # 5747907

ADDRESS 57 Sonter Road,
Christchurch,
Canterbury

PHONE +64 27 777 9867

WEBSITE www.thekvascompany.com

FOUNDED 2015

STAFF # 2 + **SEASONAL #**

REVENUE \$M \$2 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

THE ORGANIC MECHANIC



CO-FOUNDER Graedon Parker

DESCRIPTION Manufacturer of Kombucha, hemp.

KEY PRODUCTS kombucha

BRANDS OM

OWNERS Parker, Liew, Joshi, Corliss

CO. # 4511418

ADDRESS 69 Saint Georges Bay Road,
Parnell,
Auckland

PHONE +64 21 027 07642

WEBSITE www.organicmechanic.co.nz

FOUNDED 2013

STAFF # 5 + **SEASONAL #**

REVENUE \$M \$1 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS

VIGOR & VITALITY



CEO Hayden Booker

DESCRIPTION Non dairy 'milk' manufacturer; nuts and seed based; based in Tauranga.

KEY PRODUCTS Nut and seed "mylk", seeds

BRANDS Vigor and Vitality

OWNERS Booker

CO. # 5124901

ADDRESS 293 Cameron Road,
Tauranga,
Bay of Plenty

PHONE +64 22 355 4524

WEBSITE www.vvmylk.nz

FOUNDED 2014

STAFF # 2 + **SEASONAL #**

REVENUE \$M \$0 - \$2m (2019) Est.
Source: Coriolis

HIGHLIGHTS

VISTA DRINKS/FREE-FLOW MANUFACTURING



CO-FOUNDER Scott Day

DESCRIPTION Flavoured sparkling water brand based in Auckland; partnership with Lion for sales and merchandising; Sister company Free-Flow Manufacturing a contract beverage manufacturing company, manufactures Vista.

KEY PRODUCTS Flavoured sparkling water

BRANDS Vista

OWNERS RSN Ltd (Day, Hopper, Sorensen) 75%, Gibbons 25%

CO. # 6197613/7329956

ADDRESS 3/116a Harris Road
East Tamaki,
Auckland

PHONE +64 21 128 4481

WEBSITE www.vistadrinks.co.nz
www.free-flow.co.nz

FOUNDED 2016

STAFF # 26 + **SEASONAL #**

REVENUE \$M \$1 - \$5m (2019) Est.
Source: Coriolis

HIGHLIGHTS Gibbons acquires 25% ownership, Jan 19; partnership with Lion for sales and merchandising of beverages, Feb 19, brings Vista into Lions Drink Collective division

WAIKIRIKAU KOMBUCHA



DESCRIPTION Wild harvest native plants kombucha beverages company.

KEY PRODUCTS kombucha beverages

BRANDS Waikirika

OWNERS

CO. #

ADDRESS

PHONE

WEBSITE

FOUNDED 2019

STAFF # + **SEASONAL #**

REVENUE \$M \$0.5 - \$1m (2019) Est.
Source: Coriolis

HIGHLIGHTS

WALTER & WILD



MANAGING DIRECTOR Harry Hart

DESCRIPTION Food manufacturer; amalgamation of Hubbards Foods, Hansells and table sauce products from Cerebos Gregg's (required divestment; Hansells operations include contract manufacturing; food service; distribution; 2 manufacturing sites in Auckland; 25% stake in Hansells Masterton (contract manufacturer; 63 employees); operations in AU and UK; exports to China, Pl's, HK, UK; Hubbard Foods is #3 cereal supplier in NZ; I Love Food Co pies and cookies.

KEY PRODUCTS Puddings, deserts, spices, flavours, soups, beverages, cordials, dressings, dips, tomato sauce, steak sauce, sauces, cereals, muesli, granola, pies, sausage rolls, cookies (+500 products)

BRANDS Alfa One, Aunt Betty's, Hansells, Vitafresh, Hubbards, Gregg's, F. Whitlock & Sons, Vitasport, The Coconut Collaborative, Teza, Weight Watchers, I love Pies, I Love Baking, Aunty's,

OWNERS Graeme Hart 67%, Harrison Hart 33% (Rank Group)

CO. # 6828715

ADDRESS Rank Group Holdings
Floor 9, 148 Quay Street,
Auckland

PHONE +64 9 579 7199

WEBSITE www.walterandwild.com
www.hubbards.co.nz
www.hansells.com
www.ilovefoodco.com

FOUNDED 2018

STAFF # 340 + **SEASONAL #**

REVENUE \$M \$150 - \$160m (2018) Est.
Source: Coriolis

HIGHLIGHTS Acquired Hubbards Foods, Hansells and table sauce products from Cerebos Gregg's in Jun '18; acquired I Love Food Co in Oct '18

WESTS (NZ)



CO-OWNER Alf Loretan

DESCRIPTION Soft drink manufacturer; factory store; own PET bottle manufacturing on site; exports to Pacific Islands.

KEY PRODUCTS Soft drinks, honey drinks, cordials, syrups, bottled water, postmix

BRANDS Wests

OWNERS Loretan family

CO. # 1900019

ADDRESS 135 Bay View Road,
South Dunedin, Dunedin,
Otago

PHONE +64 3 455 4448

WEBSITE www.wests.co.nz

FOUNDED 1876/2007

STAFF # 8 + **SEASONAL #**

REVENUE \$M \$5 - \$10m (2019) Est.
Source: Coriolis

HIGHLIGHTS Business for sale late 2019

WILD DISPENSARY



MANAGING DIRECTOR Ruth Vaughan

DESCRIPTION Natural health company based in Dunedin producing small batch wild herb formulas. Specialise in liquid tonics, functional vinegars as well as a therapeutic range. Celebrating local, native and wild crafted plants, Wild Dispensary curates a comprehensive range of medicinal herbal formulations. Our range of tonics, vinegars and therapeutic tinctures harness the power of plants to keep you and your families well.

KEY PRODUCTS Switchel and Firecider (as functional beverage concentrates), liquid tonics, functional vinegars, therapeutic tincture range

BRANDS Wild Dispensary

OWNERS Vaughan, Davies, Macfarlane

CO. # 6200070

ADDRESS 74 Signal Hill Road,
Opoho, Dunedin,
Otago

PHONE +64 21 185 0471

WEBSITE www.wilddispensary.co.nz

FOUNDED 2017

STAFF # 3 + **SEASONAL #** 3

REVENUE \$M \$0.5 - \$3m (2019) Est.
Source: Company

HIGHLIGHTS

A broad range of organisations support the beverages industry



- Represent producers, brand owners and suppliers of beverages, juices, flavoured dairy, water and non-alcoholic beverages
- Funding via membership fees
- www.nzbeveragecouncil.org.nz

Beverage Industry
Advocacy



- Represents the manufacturers and suppliers behind New Zealand's food, beverage and grocery brands
- Funding via membership fees
- www.fgc.org.nz

Manufacturer
Advocacy



- Business development advice and access to science and research facilities across five locations
- Funding government and user pays
- www.foodinnovationnetwork.co.nz

Science, Product
Development and Advisory



- Represent 5,000 produce growers
- Commodity Levy (FruitFed and VegFed) Order 2007
- 21 product groups pay levy
- www.hortnz.co.nz

Grower Support &
Advocacy

GLOSSARY OF TERMS

A\$/AUD	Australian dollar	n/a	Not available/not applicable
ABS	Absolute change	N. America	North America (USA, Canada)
ANZSIC	AU/NZ Standard Industry Classification	Nec/nes	Not elsewhere classified/not elsewhere specified
AU	Australia	NZ	New Zealand
Australasia	Australia and New Zealand	NZ\$/NZD	New Zealand dollar
b	Billion	Pac Isl or PI	Pacific Islands
CAGR	Compound Annual Growth Rate	R&D	Research and Development
CN	China	S Asia	South Asia (Indian Subcontinent)
CRI	Crown Research Institute	SE Asia	South East Asia
E Asia	East Asia	S.H	Southern Hemisphere
FAO	Food and Agriculture Organisation of the United Nations	T or t	Tonne
FY	Financial year (of firm in question)	US/USA	United States of America
HK	Hong Kong	US\$/USD	United States dollar
JV	Joint venture		
m	Million		

