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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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.

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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

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 growths, producing world-renowned wine varieties.
- **Dairy**: New Zealand is a global leader in dairy trade, gaining expert market share in the past decade.
- **Meat**: New Zealand is the global leader in lamb and beef meat exports, with a strong presence in these markets and growing chicken exports.

**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 Chinese markets due to FTA and geographical proximity.

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

Stage I
Preliminary Screen

Stage II
Secondary Screen

Stage III
Develop Opportunities

Met criteria 594

Met criteria 51

Identified 20

Explored in depth 4

Flavoured beverages, other

Blueberries
Fresh cherries
Chocolate, blocks


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

- NON-ALCOHOLIC
- CIDER, Sake, & Similar
- BEER
- WINE
- SPIRITS

**BEVERAGES**

- **WATERS**
  - HS220110 (Mineral)
  - HS220190 (Still)
- **SOFT DRINK/FLAVOURED BEVERAGES**
  - HS220210 (Added sweetener)
  - HS220290 (No added sweetener)
- **FRUIT JUICES**
  - HS2009

**PROJECT FOCUS – NON-ALCOHOLIC BEVERAGES**

Note: Definitions are from the global Harmonised System (HS) of international trade codes (see https://en.wikipedia.org/wiki/Harmonized_System)
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 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 than 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”.

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. Foxton 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)
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 turmeric 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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New Zealand’s success in non-alcoholic beverages has three key drivers

**STRONG COUNTRY IMAGE**
- “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**
- 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**
- 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

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<th>STRENGTHS</th>
<th>WEAKNESSES</th>
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<tr>
<td>Abundant supply of sugar (NZ Sugar) and numerous unique raw materials as ingredients; ready access to global flavours and ingredients</td>
<td>Small size of domestic market</td>
</tr>
<tr>
<td>Largest global exporter of dairy ingredients</td>
<td>Distance to major high value markets (e.g. relative to Ireland and the UK)</td>
</tr>
<tr>
<td>Known and trusted supplier of safe and secure ingredients and products to most major global food &amp; beverage multinationals</td>
<td>Limited pool of domestic or resident capital</td>
</tr>
<tr>
<td>Robust regulatory system ensures food produced is safe and suitable</td>
<td>Small domestic private equity sector</td>
</tr>
<tr>
<td>Lower cost structure than Australia or the United States</td>
<td>No rich food and beverage cultural heritage or tradition to draw from for new product development (vs. France or Italy)</td>
</tr>
<tr>
<td>Low/no corruption, rule of law, efficient court system</td>
<td>Need to import tropical ingredients (i.e. mango); similar to other major producers</td>
</tr>
<tr>
<td>Welcoming of foreign investment, particularly greenfields value-added processing</td>
<td>Exchange rate variability</td>
</tr>
<tr>
<td>Strong local manufacturing/process technology skills</td>
<td></td>
</tr>
<tr>
<td>Customer/consumer awareness, particularly in Asia, of New Zealand as a source of quality, wholesome foods</td>
<td></td>
</tr>
<tr>
<td>International surveys highlight high levels of innovation and entrepreneurship</td>
<td></td>
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<tr>
<td>Close proximity to fast growing Asian markets</td>
<td></td>
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<td>Growth of Asian middle class; increasing wealth in Asia</td>
<td>Competitors with lower costs and greater economies of scale</td>
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<td>Changing global weather patterns (also a threat)</td>
<td>Continued consolidation of global multinationals leading to hollowing out their local offices (both a big challenge and a huge opportunity)</td>
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<td>Rich countries of Europe pricing themselves “out of the game”</td>
<td>The boom/bust economic cycle expresses itself in China</td>
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<td>Large and growing demand for products with soft characteristics (e.g. sustainable)</td>
<td>Global pandemic threatens channels and markets</td>
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<td>A number of alternative channels for beverages</td>
<td></td>
</tr>
<tr>
<td>Leverage success of New Zealand food industry; build on awareness of New Zealand in beverages</td>
<td></td>
</tr>
<tr>
<td>Growth of busy lifestyles and convenience foods and beverages</td>
<td></td>
</tr>
<tr>
<td>Medium-sized NZ firms collaborating on marketing and sales in new markets</td>
<td></td>
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</tbody>
</table>
New Zealand has a long history in non-alcoholic beverages across three broad eras of development

**PIONEER ERA (1860’s-1930’s)**
- 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)**
- 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+)**
- 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

Source: Coriolis; photo credit (old images out of copyright or fair use; low resolution; complete product/brand or promotional material for illustrative purposes)
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**

<table>
<thead>
<tr>
<th>Region</th>
<th>2000-2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auckland</td>
<td>140</td>
</tr>
<tr>
<td>Hawke’s Bay</td>
<td>120</td>
</tr>
<tr>
<td>Other N. Island</td>
<td>100</td>
</tr>
<tr>
<td>Wellington</td>
<td>80</td>
</tr>
<tr>
<td>Nelson/Tasman</td>
<td>60</td>
</tr>
<tr>
<td>Other S. Island</td>
<td>40</td>
</tr>
<tr>
<td>Canterbury</td>
<td>20</td>
</tr>
</tbody>
</table>

### # OF MANUFACTURERS BY REGION
**Operating units; 2019**

- Auckland: 38%
- Wellington: 9%
- Nelson/Tasman: 6%
- Other South Island: 5%
- Canterbury: 11%
- Other N. Island: 23%
- Hawke’s Bay: 8%

Source: Statistics NZ; Coriolis analysis, modelling and classification
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

Source: Statistics NZ; Coriolis analysis, modelling and classification
The New Zealand beverage industry has a relatively straightforward 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.

<table>
<thead>
<tr>
<th>Category</th>
<th>Value (NZ$)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Soft Drinks/Flavoured beverages</td>
<td></td>
<td>53%</td>
</tr>
<tr>
<td>Soft drinks, bottled/other</td>
<td>$48</td>
<td>17%</td>
</tr>
<tr>
<td>Other single fruit/veg</td>
<td>$48</td>
<td>17%</td>
</tr>
<tr>
<td>Mixed juices</td>
<td>$7</td>
<td>2%</td>
</tr>
<tr>
<td>Apple juice</td>
<td>$18</td>
<td>7%</td>
</tr>
<tr>
<td>Soft drinks, canned</td>
<td>$101</td>
<td>36%</td>
</tr>
<tr>
<td>Mineral water</td>
<td>$41</td>
<td>14%</td>
</tr>
<tr>
<td>Still water</td>
<td>$19</td>
<td>7%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>$282m</td>
<td></td>
</tr>
</tbody>
</table>

Juices 26%

Waters 21%

Source: Statistics NZ, Coriolis classification and analysis
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

Primarily apple juices as a by-product of apple growing
Wide range of branded beverages as a result of innovation and brand building

Source: Statistics NZ, Coriolis classification and analysis
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

Source: Statistics NZ; Coriolis classification and analysis
New Zealand non-alcoholic beverages exports can be segmented into three key markets, each with different strategic priorities.

**AUSTRALIAN MARKET**
- Differentiate products
- Build distribution
  - Emphasise story
  - Address price pressures through scale
  - Create point-of-difference

**EAST & SE ASIAN MARKETS**
- Position as premium
  - Ensure best leverage of FTAs*
  - Develop awareness of NZ as a trusted supplier
  - Identify defensible niche positions
  - Collaborate to reduce cost and build scale
  - Improve access
  - Position NZ as luxury/super-premium

**EUROPE/NORTH AMERICAN MARKETS**
- Fix underperformance
- Recreate wine success
  - Need a unique product/position to avoid a “coals to Newcastle” challenge; suggest unique New Zealand flavours
  - Develop a plan to succeed in the UK market; lessons from wine and honey
  - Position NZ as luxury/super-premium

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

- E/SE ASIA: 34%
  - Greater China: $56, 20%
  - Japan: $29, 10%
  - Other E/SE Asia: $11, 4%

- Australia: $145, 51%
- Greater China: $22, 8%
- Japan: $29, 10%
- Other E/SE Asia: $11, 4%
- Pacific Islands: $14, 5%
- Europe: $3, 1%
- Other: $2, 1%

TOTAL = $282m

Source: Statistics NZ; Coriolis classification and analysis
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

Source: Statistics NZ; Coriolis classification and analysis
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</table>
New Zealand has a long history in fruit production

- 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.

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

- Creating

MARKETING BOARD

- 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

**Core**
300,000t+
- Kiwifruit
- Apples

**Secondary**
5,000-30,000t+
- Mandarins
- Oranges
- Blackcurrants
- Strawberries
- Lemons
- Cherries

**Emerging**
1,001-5,000t
- Feijoas
- Pears
- Peaches
- Apricots
- Nectarines
- Boysenberries
- Blueberries
- Plums
- Persimmons

**Tertiary & future**
Under 1,000
- Nashi
- Raspberries
- Tangelos
- Feijoa
- Other brambles
- Tamarillos
- Limes
- Grapefruit
- Kiwiberries
- Passionfruit
- Table grapes
- Other

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 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

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

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

NEW ZEALAND PRODUCTION OF SELECT VEGETABLES USED IN JUICE
Tonnes; 1997-2018

Source: Plant & Food Fresh Facts (various years); Coriolis analysis
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

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

Source: UN Comtrade, Coriolis classification and analysis
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

Source: UN Comtrade, Coriolis classification and analysis
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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</table>
“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

Source: CIA World Fact Book
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*

- **NORTH ISLAND AQUIFERS**
  - Area: 44,620km²

- **SOUTH ISLAND AQUIFERS**
  - Area: 25,870km²

**TAUPO VOLCANIC ZONE SPRINGS**

**SOUTHERN ALPS ZONE SPRINGS**

**ACTIVE FAULTS**

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

Source: UN Comtrade, Coriolis classification and analysis
Growth in demand for New Zealand water exports is coming from China

NEW ZEALAND WATER EXPORT VALUE BY DESTINATION
US$; m; 1989-2019

Source: UN Comtrade, Coriolis classification and analysis
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 export volume.

WHAT IF NEW ZEALAND EXPORTED AS MUCH WATER AS FRANCE?

Hypothetical; litres; share of litres; 2020

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

Source: CIA World Fact Book; UN Comtrade; Coriolis classifications and analysis
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</tbody>
</table>
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”

<table>
<thead>
<tr>
<th>HS Code</th>
<th>Short</th>
<th>Detailed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>Juice</td>
<td>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</td>
</tr>
<tr>
<td>2201</td>
<td>Water</td>
<td>Waters, including natural or artificial mineral waters and aerated waters, not containing added sugar or other sweetening matter nor flavoured; ice and snow</td>
</tr>
<tr>
<td>2202</td>
<td>Soft Drinks</td>
<td>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)</td>
</tr>
</tbody>
</table>
What are soft drinks? Soft drinks are effectively water, sweetener and flavourings.

**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
- Flavoursing (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

*Photo credit (pngimg; CC-BY-NC 1.0); Source: Time Magazine Feb 15, 2011; Mark Pendergrast “For God, Country and Coca-Cola” 1993*
Soft drinks are typically segmented by flavour

EXAMPLE: SOFT DRINK RANGE OF KARMA COLA & FOXTON FIZZ
Select examples from range; 2020

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

* 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

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

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

Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis
The value of New Zealand soft drink exports is growing based on solid volume growth and long term price growth.
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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Appendices
Since 2000, New Zealand has experienced an explosion in new beverage firm formation.

Identified/Profiled Firms by Year Founded

Time brand groups; 19th Century to 2019

Prior to 1950: 6
1950-1990: 8
1990-2000: 7
2000-2010: 25
2010-2019: 71

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

SELECT EXAMPLES

2016

2017

2018

2019
New Zealand growers are adding value by moving into juices

SELECT EXAMPLES

- 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

Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis
New Zealand traditional syrup/cordial firms are extending their brands and ranges into ready-to-drink (RTD)

Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis
New products are being created around product innovation

SELECT EXAMPLES

Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis
New Zealand producers are differentiating themselves by using unique local botanicals, particularly horopito and kawakawa
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

Source: various; photo credit (fair use; low resolution; complete product/brand for illustrative purposes); Coriolis analysis
The beverage industry has a constant stream of new product categories that emerge across the Anglo-European world.

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

* 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

California is onto the trend earlier (5+ years)

Takes off more rapidly in New Zealand once it reaches critical mass

Source: Google; Coriolis analysis
New Zealand beverage firms go through a typical pattern of growth

SIMPLIFIED MODEL OF NEW ZEALAND BEVERAGE FIRM EVOLUTION
Conceptual model; 2020

1. **Single Product Firm**
2. **Packaging & Form Extensions**
3. **Flavour Extensions**
4. **New Brands New Segments**
5. **Acquisitions**
6. **Acquired by Global Firm**

- **Low barriers to entry**
- **New beverage firms are typically formed around a new product category**
- **Leveraging fixed costs in production and distribution**
- **Constantly increasing need for capital as the business grows**
- **May list on share market during growth**

Source: Coriolis analysis
Three high profile examples show the pattern

EXAMPLES OF NEW ZEALAND BEVERAGE FIRM EVOLUTION
Simplified examples; select dates

**ORIGINALS**

- **Charlie’s**
  - Founded in 1999
  - Initially fresh orange juice
  - Expand into other products
  - Listed on NZX in 2005
  - Charlie’s acquires Phoenix in 05
  - Opens plant in South Australia in 2008
  - Acquired by Asahi of Japan for $129m in 2011

- **Phoenix**
  - Founded in 1986
  - Initially ginger beer
  - Expand into other beverage products

- **‘FRESH-UP’**
  - Brand founded in 1962
  - Initially fresh orange juice; Launch Just Juice 81
  - Became ENZA 92 and Frucor 96
  - Expand into other beverage products
  - Launches V Energy in 1997
  - Sold to Private Equity for $50m in 98
  - Becomes Pepsi bottler; acquires Spring Valley (AU)
  - Acquired by Danone in 2002 for $294m
  - Acquired by Suntory in 2009 for €600m

Source: Coriolis analysis
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

<table>
<thead>
<tr>
<th>STAGE I: SMALL IN A NEW CATEGORY</th>
<th>STAGE II: GROWTH GETS HARDER</th>
<th>STAGE III: THE OFFER YOU CAN’T REFUSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>- New category emerges elsewhere and is copied in New Zealand (e.g. Kombucha)</td>
<td>- Product available nationwide across high end outlets; further growth requires entry into larger, more competitive channels that demand high margins across larger volumes</td>
<td>- Product is available across all channels</td>
</tr>
<tr>
<td>- About one every 2-4 years</td>
<td>- Supermarkets</td>
<td>- Exports are growing to Australia; Australian imports may now be arriving</td>
</tr>
<tr>
<td>- Often started by returned expats</td>
<td>- Chain foodservice</td>
<td>- Large multinationals with strong distribution have entered the category</td>
</tr>
<tr>
<td>- Barriers to entry are low (New Zealand has been creating +10 new firms/year)</td>
<td>- Convenience stores</td>
<td>- Original firms that “started the category”</td>
</tr>
<tr>
<td>- Benchtop scale to shed is easy</td>
<td>- 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.)</td>
<td>- Are struggling to manage growth</td>
</tr>
<tr>
<td>- 2-3 person operation (“husband and wife” operations)</td>
<td>- National distribution is challenging and outgrows patchwork of regional distributors of mixed quality and performance; firm considers building own distribution network</td>
<td>- Have a constant need for capital</td>
</tr>
<tr>
<td>- Product unit prices ($/l) are relatively high; product targets premium consumers</td>
<td>- Many channels require vendor supplied equipment (e.g. fridges)</td>
<td>- Have raised capital in multiple rounds from multiple sources</td>
</tr>
<tr>
<td>- Distribution done through “a truck” and a patchwork of distributors</td>
<td>- Competition is growing as category has attracted other new entrants; multinational(s) launch “me-too” copycat products</td>
<td>- Has launched numerous line extensions and new brands</td>
</tr>
<tr>
<td>- Some sales channels are easy to access</td>
<td>- Launching line extensions to build volume</td>
<td>- Are seeking to leverage fixed costs and distribution infrastructure</td>
</tr>
<tr>
<td>- Farmers markets</td>
<td></td>
<td>- Multinationals offer distribution to leading fast growth smaller firms to draw them “into their web”</td>
</tr>
<tr>
<td>- Gourmet/specialty (e.g. Farro)</td>
<td></td>
<td>- Originating firms either (1) list on the NZX, (2) are acquired by major multinational or (3) dwindle and retreat into obscurity</td>
</tr>
<tr>
<td>- Health Food (e.g. Commonsense)</td>
<td></td>
<td></td>
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</table>
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

<table>
<thead>
<tr>
<th>Category</th>
<th>Coca-Cola Amatil</th>
<th>Suntory Frucor-Suntory</th>
<th>Asahi Better Drinks</th>
<th>Kirin/Lion Beverages</th>
</tr>
</thead>
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<tr>
<td><strong>TRADITIONAL SOFT DRINKS</strong></td>
<td>Coca-Cola, Sprite, Fanta, Lift, L&amp;P</td>
<td>Pepsi, 7UP, Mountain Dew, Lucozade</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>MIXERS</strong></td>
<td>Schweppes</td>
<td>Phoenix Organic</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>SPORTS DRINKS</strong></td>
<td>Powerade</td>
<td>Gatorade</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>ENERGY DRINKS</strong></td>
<td>Monster Energy Mother</td>
<td>Rockstar V Energy</td>
<td>Phoenix Organic Energy</td>
<td>-</td>
</tr>
<tr>
<td><strong>WATER</strong></td>
<td>Pump</td>
<td>H2Go NZ Natural</td>
<td>Phoenix Organic</td>
<td>-</td>
</tr>
<tr>
<td><strong>FLAVOURED WATER</strong></td>
<td>Pumped</td>
<td>H2Go Mizon NZ Natural</td>
<td>Phoenix Organic</td>
<td>-</td>
</tr>
<tr>
<td><strong>JUICE</strong></td>
<td>Keri Juice Most Thexton’s</td>
<td>McCoy Ribena</td>
<td>Charlie’s Honest Fizz Phoenix Organic</td>
<td>-</td>
</tr>
<tr>
<td><strong>ADULT SOFT DRINKS</strong></td>
<td>Deep Springs</td>
<td>Amplify kombucha*</td>
<td>Charlie’s Honest Fizz Phoenix Organic</td>
<td>GoodBuzz Höpt Mac’s</td>
</tr>
<tr>
<td><strong>CORDIAL</strong></td>
<td>Rose’s Baker Hall</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>COFFEE &amp; TEA BEVERAGES</strong></td>
<td>Barista Bros Grinders Fuze Tea</td>
<td>V Iced Coffee</td>
<td>Phoenix Chai Ti Tonics Real Iced Tea</td>
<td>Havana Coffee Teza</td>
</tr>
</tbody>
</table>

* Not manufactured in NZ; Source: various company websites; Coriolis analysis and classifications
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<td><strong>8 WATER NEW ZEALAND</strong></td>
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<tr>
<td><strong>HYDRATION</strong></td>
<td>Cameroon Russell</td>
</tr>
<tr>
<td><strong>MSTER</strong></td>
<td>Wellness beverages and effervescent tablets; Supporting travel recovery, boosting immunity, circulation and hangover recuperation.</td>
</tr>
<tr>
<td><strong>KEY PRODUCTS</strong></td>
<td>1 Above Hydration, 1 Above effervescent tablets</td>
</tr>
<tr>
<td><strong>OWNERS</strong></td>
<td>Russell, others</td>
</tr>
<tr>
<td><strong>CO. #</strong></td>
<td>7783476</td>
</tr>
<tr>
<td><strong>ADDRESS</strong></td>
<td>131 Kerrs Road, Wiri, Auckland</td>
</tr>
<tr>
<td><strong>PHONE</strong></td>
<td>+64 9 379 5708</td>
</tr>
<tr>
<td><strong>WEBSITE</strong></td>
<td><a href="http://www.live1above.com">www.live1above.com</a></td>
</tr>
<tr>
<td><strong>FOUNDED</strong></td>
<td>2010</td>
</tr>
<tr>
<td><strong>STAFF #</strong></td>
<td>5</td>
</tr>
<tr>
<td><strong>HIGHLIGHTS</strong></td>
<td>Frequent flyers, business people and athletes choice for fighting jetlag. Distribution development in the USA, Australia, South East Asia, China and Japan in 2020</td>
</tr>
</tbody>
</table>
### 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  
**Revenue $M**: $2 - $5m (2019) Est.  
**Source**: Company  
**Highlights**: Developed and produced in The Foodbowl, published clinical trial studies '20; launching into Taiwan, ME '20;

### ALPINE DRINKS NZ

**Owner**: Arjan Odiredra  
**Description**: Water bottling manufacturer sourcing water from the Heretaunga aquifier in Hawke's Bay.

**Key Products**: Still and sparkling, bottled and boxed water

**Brands**: Alpine Drinks  
**Owners**: Odiredra  
**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  
**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; Marneth & Prime Flavoured milk products; plant capacity is 50m bottles per year.

**Key Products**: Varied Apple Juice, Varied Apples paired with fruits & wellness ingredients

**Brands**: The Apple Press  
**Owners**: Beaton family 55%, Erickson family 10%, others  
**CO. #**: 4506558  
**Address**: Ta Ara Kahikatea, Whakatu, Hastings, Hawkes Bay  
**Phone**: +64 800 568 3277  
**Website**: www.apollofoods.co.nz, www.theapplepress.co.nz

**Founded**: 2013  
**Staff #**: 27  
**Source**: Coriolis  
**Highlights**: State of the art beverages 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**: Bottled 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, SOL2O, Blue Spring Water  
**Owners**: Anderson 96%, Lee family, Donnell 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  
**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 Orakei Artesian Aquifer and contract bottled; domestic plus delivery model and export.

**Key Products:** Water 1.5L, 10L boxes, bottled water

**Brands:** Water in a box, U Water

**Owners:** Carol Corran, Wicks, others

**Co. #:** 1479092

**Address:** Unit 26/18 Airborne Road, Albany, Auckland

**Phone:** +64 9 415 6564  
**Website:** www.aquaceuticals.co.nz

**Founded:** 2004  
**Staff #:** 4  
**Revenue $M:** $1 - $5m (2019) Est.  
**Source:** Coriolis

### ARAI 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 #:** 4  
**Revenue $M:** $0 - $1m (2019) Est.  
**Source:** Coriolis

### 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  
**Revenue $M:** $2 - $4m (2019) Est.  
**Source:** Coriolis

### 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  
**Revenue $M:** $0.5 - $2m (2019) Est.  
**Source:** Coriolis
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, cardials 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%, Dankers 1%

CO. #: 135218

ADDRESS: 72 Shaw Road, Geraldine, Canterbury

PHONE: +64 3 693 8969


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 Unsweltered Blackadder Blackcurrant Juice, for brain health and 500ml premium cardials in ’16; new CEO in Feb ’18; finalist in 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: Joana Nolan

DESCRIPTION: Fermented food and beverage manufacturer; broad distribution throughout NZ in New World, Bin Inn, other specialty 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 #


Source: Coriolis


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 #


Source: Coriolis


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 #


Source: Coriolis

HIGHLIGHTS: Revenues $2 - $5m (2019) Est.
**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, Barich 50%

**CO. #** 803057/286873

**ADDRESS**
76 Lady Ruby Drive, East Tamaki, Auckland

**PHONE**
+64 9 914 7180

**WEBSITE**
www.tslplastics.nz

**FOUNDED**
1996/1986

**STAFF #** 50 + SEASONAL #

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

**HIGHLIGHTS**

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**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 is LiveBrew daily probiotic beverage.

**KEY PRODUCTS**
Probiotic beverage supplement

**BRANDS**
LiveBrew, EquiBrew, ClafBrew, StockBrew,

**OWNERS**
Hughes, Prassinos, Pearson & others

**CO. #** 2243451

**ADDRESS**
Rotoua
Bay of Plenty

**PHONE**
0508 2462 739

**WEBSITE**
www.biobrew.net.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, LeSnax, Twirlies, Cheesels, Rashuns, Burger Rings, Poppo Jacks, Nobby’s, 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.bluebirdco.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**

---

CORIOLIS
**BRENCHLEY**

**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 Waitakouka Valley Road, Waimauku, Auckland

**PHONE**  +64 9 964 0542

**WEBSITE**  www.brix.co.nz

**FOUNDED**  2016

**STAFF #**  80  
**REVENUE $M**  $20 - $50m (2019) Est.

**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

---

**ECOLOGY + CO**

**CO-OWNER**  Diane 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. #**  $137641

**ADDRESS**  86 Collingue Road, Devonport, Auckland

**PHONE**  +64 27 280 2828

**WEBSITE**  www.ecologyandco.com

**FOUNDED**  2014

**STAFF #**  3  
**REVENUE $M**  $1 - $2m (2018)  
Source: Coriolis

**HIGHLIGHTS**  

---

**CHI INTERNATIONAL**

**MANAGING DIRECTOR**  Ray Nicholls  
**DESCRIPTION**  Sparkling herbal beverage manufacturer; based in Auckland.

**KEY PRODUCTS**  Sparkling beverages

**BRANDS**  Ch'i

**OWNERS**  Williamon, Nicholls

**CO. #**  364499

**ADDRESS**  Unit A, 2 Sawmill Road, Riverhead, Auckland

**PHONE**  +64 9 412 2348

**WEBSITE**  www.chidrinks.com

**FOUNDED**  1987

**STAFF #**  5  
**REVENUE $M**  $2 - $3m (2019) Est.

**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, Annestown, Nelson

**PHONE**  +64 3 547 9300

**WEBSITE**  www.chia.co.nz

**FOUNDED**  2012

**STAFF #**  5  
**REVENUE $M**  $2 - $5m (2019) Est.

**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, Fussa Tea, Knit Blue, Barista Bros, Keri

**OWNERS**
Coca-Cola Amatil Limited (ASK:CL)

**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 to 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 viengar

**BRANDS**
Daily Organics

**OWNERS**
Ward, Gwynne

**CO. #**
4676763

**ADDRESS**
2 Matakana Valley Road, Matakana, Auckland

**PHONE**
+64 508 356 5323

**WEBSITE**
www.dailyorganics.com

**FOUNDED**
2013

**STAFF #**
3 + SEASONAL #

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

**HIGHLIGHTS**
Acquired beverages portfolio and brands from Davies Foods ‘18

**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**

**OWNERS**
DKSH AG

**CO. #**
6902814

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

**PHONE**
+64 508 356 3323

**WEBSITE**
www.loadeddrinks.com

**FOUNDED**
1958/2018

**STAFF #**
16 + 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 Ltd

**CO. #**
4115480

**ADDRESS**
Level 2, 27 Bath Street, Ponell, 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.
<table>
<thead>
<tr>
<th>Company</th>
<th>Description</th>
<th>Key Products</th>
<th>Founder</th>
<th>Owners</th>
<th>Brands</th>
<th>Seasonal Products</th>
<th>Revenue ($m)</th>
<th>Staff</th>
<th>Highlights</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ECOWAI</strong></td>
<td>Bottled water company based in Putaruru, sourcing the Blue Spring Te Waihou Spring; uses 100% recycled plastic and glass.</td>
<td>still water, sparkling water</td>
<td>Barry Hillyer</td>
<td>Hillyer</td>
<td>Ecowai</td>
<td></td>
<td></td>
<td></td>
<td>New cherry juice products finalists in the 2018 Fine Food New Zealand Most Innovative Retail Grocery Product category</td>
<td><a href="http://www.ecowai.co.nz">www.ecowai.co.nz</a></td>
</tr>
<tr>
<td><strong>EDEN JUICE</strong></td>
<td>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.</td>
<td>Cherry juice, blueberry juice, Sparkling Juice range</td>
<td>Gary Bignell</td>
<td>Bignell Family 70%, Gourmet Paprika 30%</td>
<td>Eden Orchards</td>
<td></td>
<td></td>
<td></td>
<td>New cherry juice products finalists in the 2018 Fine Food New Zealand Most Innovative Retail Grocery Product category</td>
<td><a href="http://www.edenorchards.co.nz">www.edenorchards.co.nz</a></td>
</tr>
<tr>
<td><strong>EDEN ORCHARDS</strong></td>
<td>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 45ha from Central Otago; Eden Juice partnership with Gourmet Paprika</td>
<td>Cherries, apricots, nectarines, peaches, cherry juice, sparkling cherry juice</td>
<td>Gary Bignell</td>
<td>Bignell</td>
<td>Eden Orchards</td>
<td></td>
<td></td>
<td></td>
<td>New cherry juice products finalists in the 2018 Fine Food New Zealand Most Innovative Retail Grocery Product category</td>
<td><a href="http://www.edenorchards.co.nz">www.edenorchards.co.nz</a></td>
</tr>
<tr>
<td><strong>ELLIOTT CORPORATION</strong></td>
<td>Organic kiwifruit beverage manufacturer based in Auckland.</td>
<td>Juice Beverage</td>
<td>Glenn Elliott</td>
<td>Elliott, Le Queene</td>
<td>King of Kiwi</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><a href="http://www.kingofkiwi.co.nz">www.kingofkiwi.co.nz</a></td>
</tr>
</tbody>
</table>
# Fleck Water

**Director:** Craig Purdy  
**Description:** Artisan bottled water company from Queenstown.

**Key Products:** Bottled water

**Brands:** Fleck

**Owners:** Purdy and Robinson  
**Address:** 2485 Gibbston Highway, Queenstown, Otago  
**Phone:** +64 204 189 7232  
**Website:** www.fleck.co.nz

**Founded:** 2019  
**Staff:** 2  
**Revenue:** $0 - $0.5m (2019) Est.  
**HIGHLIGHTS:** Fleck sparkling mineral water launched Dec 2019; Silver Medal at Outstanding NZ Food Producers Awards 2020

# 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  
**Address:** 5968327  
**Phone:** +64 27 318 8998  
**Website:** www.forthebettergood.com

**Founded:** 2016  
**Staff:** 2  
**Revenue:** $0 - $0.5m (2019) Est.  
**HIGHLIGHTS:**

# Fountain Drinks

**Managing Director:** Gary Roberson  
**Description:** Specialist manufacturer of pasteur syrups (18 standard range flavours) and dispensing equipment.

**Key Products:** Pasteur syrups, cold brew coffee, cordials, dispensing equipment

**Brands:** Fountain drinks  
**Owners:** Private (Robertson)  
**Address:** 89 Hugo Johnston Drive Penrose, Auckland  
**Phone:** +64 9 525 0892  
**Website:** www.fountaindrinks.co.nz

**Founded:** 1997  
**Staff:** 8  
**Revenue:** $2 - $5m (2019) Est.  
**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 Foxton.

**Key Products:** Carbonated beverages

**Brands:** Foxton Fizz

**Owners:** Private NZ; 46% Wilson and Watson others  
**Address:** 8 Whyte Street, Foxton, Manawatu-Wanganui  
**Phone:** +64 6 363 8271  
**Website:** www.foxtonfizz.co.nz

**Founded:** 1918/2006  
**Staff:**  
**Revenue:** $1 - $3m (2019) Est.  
**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

BRANDS V Energy, Just Juice, Fresh Up, Simply Squeezed, K2go, NZ Natural, Amplify kombucha, Rockstar, Suntory BOSS Coffee, Ribena, Jacob’s, licensed bottler for Pepsi, etc.

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

CO. # 013026

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: AP18


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

GOJU

OWNER Tom Hartles

DESCRIPTION Wellness tonic

KEY PRODUCTS Wellness tonic

BRANDS Goju

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

CO. # 6259952

ADDRESS Auckland

PHONE

WEBSITE www.gojuhots.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 www.goodfizz.co.nz

FOUNDED 2018

STAFF # 2 + SEASONAL #

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

HIGHLIGHTS
<table>
<thead>
<tr>
<th>Company Name</th>
<th>Description</th>
<th>Owner(s)</th>
<th>Co-Owners</th>
<th>Key Products</th>
<th>REVENUE ($M)</th>
<th>Staff</th>
<th>Staff + Seasonal</th>
<th>Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GOODBUZZ BEVERAGE CO</strong></td>
<td>Manufacturer of Kombucha based in Tauranga.</td>
<td>Alex Campbell</td>
<td>C &amp; M Priddy</td>
<td>kombucha</td>
<td>$2 - $5m (2019) Est.</td>
<td>8</td>
<td>+ SEASONAL</td>
<td></td>
</tr>
<tr>
<td><strong>GREENLEAF ORGANICS</strong></td>
<td>Biogro organic Switchel apple cider vinegar beverage and tonic company based in Auckland.</td>
<td>C &amp; M Priddy</td>
<td></td>
<td>Switchel beverage tanks and shots, hemp and cashew milk, Globrews beverage powder</td>
<td>$2 - $5m (2019) Est.</td>
<td>3</td>
<td>+ SEASONAL</td>
<td></td>
</tr>
<tr>
<td><strong>GUTSY GOOD FOOD</strong></td>
<td>Manufacturer of kombucha based in Waikato.</td>
<td></td>
<td></td>
<td>kombucha beverages</td>
<td>$0.5 - $1m (2019) Est.</td>
<td>3</td>
<td>+ SEASONAL</td>
<td></td>
</tr>
<tr>
<td><strong>HAKANOA HANDMADE DRINKS</strong></td>
<td>Traditional ginger beer and syrup manufacturers; based in Auckland; contract brewed in Tauranga.</td>
<td>Rebekah Hay</td>
<td></td>
<td>Ginger beer, chai and cafe syrups, ginger syrups, dressings</td>
<td>$1 - $3m (2019) Est.</td>
<td>3</td>
<td>+ SEASONAL</td>
<td></td>
</tr>
</tbody>
</table>
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
HF Eos

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

HANSSELLS 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, 17th, 18th

BRANDS
Hansells, Kapiti Kitchen, The Goodness, Supreme, Replata, Covert, Floor Pro, Elite, Horleys

OWNERS
Stewart 27.5%, Dr Oetker Queen 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 #

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 Masterton, supplying New Zealand restaurants and cafes.

KEY PRODUCTS
Still water, sparkling water

BRANDS
Water

OWNERS
Harrington, Pirc

CO. # 5741427

ADDRESS
126 Trafalgar Street, Nelson

PHONE +64 3 928 0142

WEBSITE www.wotre.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. # 9429066843838

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.

### Life Infiniti Group NZ

- **CEO**: Adrian Shaw
- **Description**: Bottled water company sourcing water in Otakiri Aquifer, exporting to Singapore, other Asian Countries and Middle East, Ian distribution in NZ.

### 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, Asia; processes 70,000t, 70% of NZ carrot crop.

### 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 Unovent ventilation systems and Solatube skylights to homes throughout New Zealand.
**Karma Cola**

**CO-FOUNDER** Chris Morrison

**DESCRIPTION** Manufacturer of Fairtrade organic craft sodas; sole 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, Swoon, kombucha

**OWNERS** Morrison, Cairns, Redden, Coley, others

**CO. ##** 4458783

**ADDRESS** 72 Williamson Avenue, Auckland

**PHONE** +64 9 360 9691

**WEBSITE** www.allgoodorganics.co.nz

**FOUNDED** 2013

**STAFF #** 20 + SEASONAL #


**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

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**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 Cleddon-Kawakawa Road, Clevedon, Auckland

**PHONE** +64 21 883 362

**WEBSITE** www.forageandferment.co.nz

**FOUNDED** 2016

**STAFF #** 4 + SEASONAL #

**REVENUE $M** $0.5 - $3m (2019) Est.

**Source:** Company

**HIGHLIGHTS** Winners of the Outstanding NZ Food Producers Awards 2020

---

**Kiwi Beverages**

**MANAGING DIRECTOR** David Theelen

**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


**OWNERS**

**CO. ##**

**ADDRESS** 4/5 76 Hunua Road, Papakura, Auckland

**PHONE** 0275 093 381

**WEBSITE** www.kiwibeverages.co.nz

**FOUNDED** 2019

**STAFF #** 4 + SEASONAL #

**REVENUE $M** $1 - $5m (2019) Est.

**Source:** Coriolis

**HIGHLIGHTS**

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**Kiwi Kai Nelson**

**OWNER** Reni Wangere-Gargulo

**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** Gargulo

**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**

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**Coriolis**

** Keep It Real

<table>
<thead>
<tr>
<th><strong>DIRECTOR</strong></th>
<th><strong>DESCRIPTION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Kelli-Jo Walker</td>
<td>Fermented food and beverage manufacturer based in Auckland; distributing to organic and specialist stores in NZ.</td>
</tr>
</tbody>
</table>

**KEY PRODUCTS** Wild kefir soda beverages, kraut, kimchi

**BRANDS** Forage and Ferment

**OWNERS** Walker and Allen

**CO. ##** 6166403

**ADDRESS** 272 Cleddon-Kawakawa Road, Clevedon, Auckland

**PHONE** +64 21 883 362

**WEBSITE** www.forageandferment.co.nz

**FOUNDED** 2016

**STAFF #** 4 + SEASONAL #

**REVENUE $M** $0.5 - $3m (2019) Est.

**Source:** Company

**HIGHLIGHTS** Winners of the Outstanding NZ Food Producers Awards 2020

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**OWNERS**

**CO. ##**

**ADDRESS** 4/5 76 Hunua Road, Papakura, Auckland

**PHONE** 0275 093 381

**WEBSITE** www.kiwibeverages.co.nz

**FOUNDED** 2019

**STAFF #** 4 + SEASONAL #

**REVENUE $M** $1 - $5m (2019) Est.

**Source:** Coriolis

**HIGHLIGHTS**

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**KEY PRODUCTS** Food retailing; RTD adult beverages

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**OWNERS** Gargulo

**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**
<table>
<thead>
<tr>
<th>Company Name</th>
<th>Description</th>
<th>Owners</th>
<th>Address</th>
<th>Phone</th>
<th>Website</th>
<th>Founded</th>
<th>Staff</th>
<th>Revenue</th>
<th>Key Products</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Kiwifruit Processing Company</strong></td>
<td>Producers of kiwifruit purees and by-products based in Tauranga; used in pharmaceutical and nutraceutical applications; export to Asia, Europe and the Americas (over 20 countries); multiple Chamber of Commerce and Export Business award winner.</td>
<td>Grant Jeffrey</td>
<td>37 Newnham Road, Te Puna, Tauranga, Bay of Plenty</td>
<td>+64 7 552 5513</td>
<td><a href="http://www.kiwifruitz.co.nz">www.kiwifruitz.co.nz</a></td>
<td>2000</td>
<td>7</td>
<td>$5 - $10m (2019)</td>
<td><em>KiwiFruit</em>, freeze-dried powder</td>
<td>Invested in automated pouch line for blast frozen <em>KiwiFruit</em> purees in '14; expanded seed exports in '15; expanded puree exports in '16; increasing gold puree export from 2019; organically certified since early 2000's.</td>
</tr>
<tr>
<td><strong>Kombucha Bros</strong></td>
<td>Craft Kombucha beverage company based in Nelson; selling in cans and glass; Ataahua range uses native botanicals; exported to over 20 countries.</td>
<td>Brandon Turnage</td>
<td>70 Achilles Ave, Nelson</td>
<td>+64 3 548 2126</td>
<td><a href="http://www.kombuchabros.co.nz">www.kombuchabros.co.nz</a></td>
<td>2019</td>
<td>3</td>
<td>$0.5 - $2m (2019)</td>
<td>Kombucha beverages in 330ml cans and glass at 330mls; 1.25L, 2L glass riggers, plus alcoholic kombucha and cocktails</td>
<td></td>
</tr>
<tr>
<td><strong>Kombucha City</strong></td>
<td>Locally owned and operated artisan kombucha brewery, producing handcrafted beverages. Available in three flavours. Sold online and into retail and hospitality venues. Based in Auckland.</td>
<td></td>
<td>15 Dee Place, Torbay</td>
<td>+64 27 488 2934</td>
<td><a href="http://www.kombuchacity.co.nz">www.kombuchacity.co.nz</a></td>
<td>2016</td>
<td>1</td>
<td>$0 - $1m (2019)</td>
<td>Kombucha</td>
<td></td>
</tr>
<tr>
<td><strong>Lifeforce Water</strong></td>
<td>Tonic and beverage company.</td>
<td>Steve Papps</td>
<td>6096015</td>
<td>+64 7 824 8420</td>
<td><a href="http://www.lifeforcetonics.co.nz">www.lifeforcetonics.co.nz</a></td>
<td>2017</td>
<td>2</td>
<td>$0 - $2m (2019)</td>
<td>Tonics and beverages, minerals, health supplements</td>
<td></td>
</tr>
</tbody>
</table>

**Co-Owner**: Grant Jeffrey

**Key Products**: Green and gold kiwifruit puree, kiwifruit seed, freeze-dried powder
## LION NZ

**MANAGING DIRECTOR**
Rory Glass

**DESCRIPTION**
Lion NZ is New Zealand’s largest alcoholic beverages; Wither Hills winery in Marlborough; 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, Maas, Parkhead, Harrington’s, Emerson’s, Speights, Little Creatures, The Fermentist, Lion Red, Lion Brown, Waitakura
- Draught, Wilber Hills, Lindauer, Havana, Texas

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

<table>
<thead>
<tr>
<th>CO. #</th>
<th>33986/1035696</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDRESS</td>
<td>27 Napier Street, Freemans Bay, Auckland</td>
</tr>
<tr>
<td>PHONE</td>
<td>+64 9 347 2000</td>
</tr>
<tr>
<td>WEBSITE</td>
<td><a href="http://www.kirinholdings.co.jp">www.kirinholdings.co.jp</a>, <a href="http://www.drinkscollective.nz">www.drinkscollective.nz</a></td>
</tr>
</tbody>
</table>

**FOUNDED** 1860/1948/1977

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

**REVENUE $M** $617.6m (2018)

**HIGHLIGHTS**
- Acquired Havana coffee Dec ’18; acquired 25% share in Goodbuzz Beverage Co in ’17; acquired Harrington’s Beereries in Jul ’18, said Tastykiss assets to Goodman Fielder ’18; opened The Fermentist & Waitakura brewery in ChOx 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 Ridgby

**DESCRIPTION**
Tamarind based tonic beverage shots.

**KEY PRODUCTS**
- tonic beverage

**BRANDS**
- Little elephant

**OWNERS**
- Rickey, Govorka

<table>
<thead>
<tr>
<th>CO. #</th>
<th>7686896</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDRESS</td>
<td>25D Airdfield Road, Auckland</td>
</tr>
<tr>
<td>PHONE</td>
<td>+64 20 4189 4184</td>
</tr>
<tr>
<td>WEBSITE</td>
<td><a href="http://www.littleelephant.co">www.littleelephant.co</a></td>
</tr>
</tbody>
</table>

**FOUNDED** 2019

**STAFF #** 2 + SEASONAL #

**REVENUE $M** $0 - $1m (2019) Est.

**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)

<table>
<thead>
<tr>
<th>CO. #</th>
<th>7308096</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDRESS</td>
<td>119 Lerfoord Crescent, Avondale, Auckland</td>
</tr>
<tr>
<td>PHONE</td>
<td>-</td>
</tr>
<tr>
<td>WEBSITE</td>
<td><a href="http://www.redeemdrinks.com">www.redeemdrinks.com</a></td>
</tr>
</tbody>
</table>

**FOUNDED** 2019

**STAFF #** + SEASONAL #

**REVENUE $M** $0.2 - $1m (2019) Est.

**HIGHLIGHTS**

## LOFT FOODS

**MANAGING DIRECTOR**
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%

<table>
<thead>
<tr>
<th>CO. #</th>
<th>500060</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDRESS</td>
<td>12 Brigade Road Mangere, Auckland</td>
</tr>
<tr>
<td>PHONE</td>
<td>+64 9 600 5754</td>
</tr>
<tr>
<td>WEBSITE</td>
<td><a href="http://www.loftfoods.co.nz">www.loftfoods.co.nz</a></td>
</tr>
</tbody>
</table>

**FOUNDED** 2014

**STAFF #** 28 + SEASONAL #

**REVENUE $M** $5 - $10m (2019) Est.

**HIGHLIGHTS**

---

**CORIOLIS**

16
## 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, Castibreu, GoldRush, Major Phineas Dingleberry’s, Stara, Sunrise Juice, WAI Casa Flavoured Water

**Owners**: Patel family  
**CO. #**: 1137188  
**Address**: 15 Waka Street, Otahuhu, Auckland  
**Phone**: +64 9 276 8185  
**Website**: www.makan.co.nz  
**Founded**: 2001  
**Staff #**: 35  
**Revenue $M**: $7 - $12m (2019) Est.  
**Source**: Coriolis

## MAMA’S BREW SHOP

**Co-Owner**: Liv McGregor  
**Description**: Craft Kombucha and collaboration with Thompson’s Victor Gin to produce an alcoholic cocktail with kombucha and gin, based in Helensville.

**Key Products**: Kombucha (bottles and keg) and cocktails in a can

**Brands**: Maka’s Brew Shop, Happy Hour

**Owners**: McGregor, Schliebs  
**CO. #**: 6016310  
**Address**: 16 Rautovahi Road, Helensville, Auckland  
**Phone**: +64 21 549 624  
**Website**: www.mamabrewshop.com  
**Founded**: 2016  
**Staff #**: 2  
**Revenue $M**: $0.5 - $2m (2019) Est.  
**Source**: Coriolis

## MAMAKU BLUE BERRIES

**Owner**: Harry and Anne Frost  
**Description**: Blueberry and gooseberry farm, orchard and winery with function centre; first established orchard in 1980s; 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 3840  
**Website**: www.mamakublue.co.nz  
**Founded**: 2000  
**Revenue $M**: $1m  
**Source**: Coriolis

## MAURIORA KOMBUCHA

**Co-Founder**: Natalia Kirwan  
**Description**: Kombucha beverage company with four flavours.

**Key Products**: Kombucha

**Brands**: Mauriora Kombucha

**Owners**: Kirwan, Gibbs  
**CO. #**: 7136673  
**Address**: 414 Wessley Street, Avondale, Christchurch, Canterbury  
**Phone**:  
**Website**: www.mauriorakombucha.nz  
**Founded**: 2018  
**Staff #**:  
**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 Moa 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. #**
2235353

**ADDRESS**
660 Main Road, Stoke, Nelson

**PHONE**
+64 3 547 5357

**WEBSITE**
www.mccashins.co.nz

**WEBSITE**
www.rochdalecider.co.nz

**WEBSITE**
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 Balkoumini

**DESCRIPTION**
Juice company based in the Wairarapa, pressing and bottling apples, also producing cider and contrast 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, Balkoumini, Vallance, McClure

**CO. #**
2235353

**ADDRESS**
112 Abkauka Road Greytown, Wairarapa

**PHONE**
+64 6 304 8012

**WEBSITE**
www.mela.co.nz

**WEBSITE**
www.stokebeer.co.nz

**FOUNDED**
2009

**STAFF #**
7 + 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 Louburn, Canterbury; distributed exclusively by Avana Sanctuary in Malaysia.

**KEY PRODUCTS**
Juice (250ml, 400ml, 1L, 3L)

**BRANDS**
Mill Orchard

**OWNERS**
White Family

**CO. #**
1245892

**ADDRESS**
31 Rossiters Road, Louburn Canterbury

**PHONE**
+64 3 312 8333

**WEBSITE**
www.millorchard.co.nz

**FOUNDED**
2002

**STAFF #**
12 + SEASONAL #

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

**HIGHLIGHTS**
BioGro certified for 35 years, punnets use recyclable PET

### MONAVALE 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 #**
10 + SEASONAL #

**REVENUE $M**
$1m Source: Coriolis

**HIGHLIGHTS**
BioGro certified for 35 years, punnets use recyclable PET
<table>
<thead>
<tr>
<th>MOTHER AND DAUGHTER</th>
<th>NATURALLY PURE NEW ZEALAND</th>
<th>NEKTA NUTRITION</th>
<th>NEW LEAF KOMBUCHA</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OWNER</strong> Barbara East</td>
<td><strong>CEO</strong> Brett Tucker</td>
<td><strong>MANAGING DIRECTOR</strong> Adriana Tang</td>
<td><strong>CO-FOUNDER</strong> Derek Hllen</td>
</tr>
<tr>
<td><strong>DESCRIPTION</strong> Premium cordial manufacturer based in Wanaka.</td>
<td><strong>DESCRIPTION</strong> Artesian water bottling company based in Tai Tapu, Canterbury. Producing branded and private label bottles and boxes; also consents to take water at multiple locations around NZ.</td>
<td><strong>DESCRIPTION</strong> Specialist beverage manufacturer; specialising in kiwifruit and health beverages; manufacturing plant in Auckland; exports to China, UK, HK, Malaysia, Australia, Pacific.</td>
<td><strong>DESCRIPTION</strong> Auckland based small batch brew organic manufacturer of kombucha; onsite taproom.</td>
</tr>
<tr>
<td><strong>KEY PRODUCTS</strong> Cordial and sparkling ready to drink soda</td>
<td><strong>KEY PRODUCTS</strong> Water bottled, boxed, bulk bladders</td>
<td><strong>KEY PRODUCTS</strong> Kiwifruit juices, blackcurrent juice, yoghurt powder mix, probiotics, colostrum powder</td>
<td><strong>KEY PRODUCTS</strong> Kombucha beverages</td>
</tr>
<tr>
<td><strong>BRANDS</strong> Mother &amp; Daughter</td>
<td><strong>BRANDS</strong> Pure Waters of New Zealand, Aqualaze, SpringFresh</td>
<td><strong>BRANDS</strong> Nekta, Liquid Kiwifruit, Liquid Kiwi, Yoghurt Mix</td>
<td><strong>BRANDS</strong> New Leaf</td>
</tr>
<tr>
<td><strong>OWNERS</strong> East and Rawlings</td>
<td><strong>OWNERS</strong> Kitno, Sinclair, McCurdy, others</td>
<td><strong>OWNERS</strong> Tang family 95%, Alpha Group 5%</td>
<td><strong>OWNERS</strong> Hillen Family</td>
</tr>
<tr>
<td><strong>CO. #</strong> 6108831</td>
<td><strong>CO. #</strong> 2237440</td>
<td><strong>CO. #</strong> 1981447</td>
<td><strong>CO. #</strong> 6492733</td>
</tr>
<tr>
<td><strong>ADDRESS</strong> 1 Hollybank Lane Wanaka, Otago</td>
<td><strong>ADDRESS</strong> 364 Barnes Road, Tai Tapu, Canterbury</td>
<td><strong>ADDRESS</strong> 7 Hatea Drive, Wiri, Auckland</td>
<td><strong>ADDRESS</strong> 37 Crummer Road, Grey Lynn, Auckland</td>
</tr>
<tr>
<td><strong>PHONE</strong> +64 27 355 2431</td>
<td><strong>PHONE</strong> +64 3 329 6442</td>
<td><strong>PHONE</strong> +64 9 250 3789</td>
<td><strong>PHONE</strong> +64 9 360 0199</td>
</tr>
<tr>
<td><strong>WEBSITE</strong> <a href="http://www.motheranddaughter.co.nz">www.motheranddaughter.co.nz</a></td>
<td><a href="http://www.naturallypurenz.com">www.naturallypurenz.com</a></td>
<td><a href="http://www.nekta.com">www.nekta.com</a></td>
<td><a href="http://www.newleafkombucha.nz">www.newleafkombucha.nz</a></td>
</tr>
<tr>
<td><strong>FOUNDED</strong> 2016</td>
<td><strong>FOUNDED</strong> 2009</td>
<td><strong>FOUNDED</strong> 1993</td>
<td><strong>FOUNDED</strong> 2017</td>
</tr>
<tr>
<td><strong>STAFF #</strong> 2</td>
<td><strong>STAFF #</strong> + SEASONAL #</td>
<td><strong>STAFF #</strong> 6</td>
<td><strong>STAFF #</strong> 3</td>
</tr>
<tr>
<td><strong>REVENUE $M</strong> $0.2 - $1m (2019) Est. Source: Corioli</td>
<td><strong>REVENUE $M</strong> $2 - $5m (2019) Est. Source: Corioli</td>
<td><strong>REVENUE $M</strong> $3 - $5m (2019) Est. Source: Company</td>
<td><strong>REVENUE $M</strong> $0.2 - $1m (2019) Est. Source: Corioli</td>
</tr>
<tr>
<td><strong>HIGHLIGHTS</strong></td>
<td><strong>HIGHLIGHTS</strong> New Zealand’s first pure kombucha taproom.</td>
<td><strong>HIGHLIGHTS</strong> Supplier of beverage and cocktail mix to Carthy Pacific First and Business Class, 2020 brand refresh to focus on probiotic and digestive benefits</td>
<td><strong>HIGHLIGHTS</strong></td>
</tr>
<tr>
<td>NEW ZEALAND ARTESIAN WATER</td>
<td>NEW ZEALAND MIRACLE WATER</td>
<td>NEW ZEALAND QUALITY WATERS</td>
<td>NO UGLY</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------</td>
<td>---------------------------</td>
<td>---------</td>
</tr>
<tr>
<td><strong>E’stel</strong></td>
<td><strong>HBay Water</strong></td>
<td><strong>NZQW</strong></td>
<td><strong>No Ugly</strong></td>
</tr>
<tr>
<td><strong>CEO</strong> Andrew Strang</td>
<td><strong>CEO</strong> Xinhang Ju</td>
<td><strong>DIRECTOR</strong> Magdaline Wee</td>
<td><strong>CO-FOUNDER</strong> Jo Taylor</td>
</tr>
<tr>
<td><strong>DESCRIPTION</strong> 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.</td>
<td><strong>DESCRIPTION</strong> 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.</td>
<td><strong>DESCRIPTION</strong> 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.</td>
<td><strong>DESCRIPTION</strong> Wellness tonic beverage and cocktail manufacturer based in Auckland; supplied in glass and cans; developed in conjunction with FoodBowl.</td>
</tr>
<tr>
<td><strong>KEY PRODUCTS</strong> Bottled water, boxed water, glass and RPET</td>
<td><strong>KEY PRODUCTS</strong> bagged water, boxed water</td>
<td><strong>KEY PRODUCTS</strong> Still, lightly flavoured spring water beverages</td>
<td><strong>KEY PRODUCTS</strong> Beverages and fruit tonic</td>
</tr>
<tr>
<td><strong>BRANDS</strong> E’stel</td>
<td><strong>BRANDS</strong> Hawke’s Bay Water, HB Water</td>
<td><strong>BRANDS</strong> NZO Volcanic Spring Water, WAIZ</td>
<td><strong>BRANDS</strong> No Ugly, Denzien Gin</td>
</tr>
<tr>
<td><strong>OWNERS</strong> Punski Fund, Strang, McLeod, Wood, Herring, others</td>
<td><strong>OWNERS</strong> Xinhang Ju (24%), NZ Spring International (CH). 6%</td>
<td><strong>OWNERS</strong> NZO International 51%, Wee 49%</td>
<td><strong>OWNERS</strong> Taylor, Underdown, others</td>
</tr>
<tr>
<td><strong>CO. #</strong> 4766339</td>
<td><strong>CO. #</strong> 5723130</td>
<td><strong>CO. #</strong> 1886777</td>
<td><strong>CO. #</strong> 6382934</td>
</tr>
<tr>
<td><strong>ADDRESS</strong> 93 Beatty Street, Annesbrook, Nelson</td>
<td><strong>ADDRESS</strong> 145 Elwood Road, Waipatu, Hastings, Hawke’s Bay</td>
<td><strong>ADDRESS</strong> 83 Domain Road, Putaruru, Whakatāne</td>
<td><strong>ADDRESS</strong> 418 Napier Street, Freemans Bay, Auckland</td>
</tr>
<tr>
<td><strong>PHONE</strong> +64 3 547 2840</td>
<td><strong>PHONE</strong> +64 6 651 1991</td>
<td><strong>PHONE</strong> +64 7 883 8499</td>
<td><strong>PHONE</strong></td>
</tr>
<tr>
<td><strong>FOUNDED</strong> 2019</td>
<td><strong>FOUNDED</strong> 2015</td>
<td><strong>FOUNDED</strong> 2006</td>
<td><strong>FOUNDED</strong> 2017</td>
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<tr>
<td><strong>STAFF #</strong> 35</td>
<td><strong>STAFF #</strong> 26</td>
<td><strong>STAFF #</strong> 20</td>
<td><strong>STAFF #</strong> 5</td>
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<tr>
<td><strong>SEASONAL #</strong></td>
<td><strong>SEASONAL #</strong></td>
<td><strong>SEASONAL #</strong></td>
<td><strong>SEASONAL #</strong></td>
</tr>
<tr>
<td><strong>HIGHLIGHTS</strong> In process to switching all bottles to 100% RPET (recycled plastic)</td>
<td><strong>HIGHLIGHTS</strong> Recently established New Zealand New Water Ltd</td>
<td><strong>HIGHLIGHTS</strong> 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</td>
<td><strong>HIGHLIGHTS</strong> Collaboration with Denzien Gin</td>
</tr>
<tr>
<td>Company</td>
<td>CEO</td>
<td>DESCRIPTION</td>
<td>KEY PRODUCTS</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Norton Road Organics</td>
<td>Tony Vesper</td>
<td>Bottled water manufacturer; dedicated, hi-tech automated water bottling facility sourcing water from the Hawke’s Bay, currently 1000m+ bottles for domestic market; capacity for 32,000 bottles/yr = 220m bottles/yr; private label plus branded production.</td>
<td>Still sparkling bottled water, soda water, tonic water, ginger ale, etc.</td>
</tr>
<tr>
<td>NZ Drinks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NZ Juice Group</td>
<td>Owen Park</td>
<td>Juice processor; based in Hastings; exports to China and Taiwan.</td>
<td></td>
</tr>
<tr>
<td>Olbies</td>
<td></td>
<td>Kombucha beverage manufacturer, Biogro certified organic, also using cold-pressed organic fruits &amp; vegetables; distributed across New Zealand; subscription service.</td>
<td></td>
</tr>
</tbody>
</table>

**Brief Description of Olbies:**
Kombucha RTD beverages

**Brief Description of NZ Juice Group:**
Juice processor; based in Hastings; exports to China and Taiwan.

**Brief Description of NZ Drinks:**
Bottled water manufacturer; dedicated, hi-tech automated water bottling facility sourcing water from the Hawke’s Bay, currently 1000m+ bottles for domestic market; capacity for 32,000 bottles/yr = 220m bottles/yr; private label plus branded production.

**Brief Description of Norton Road Organics:**
Organic produce and juice company based in the Hawke’s Bay; juice retail at select organic stores across New Zealand.

**Brief Description of Olbies:**
Kombucha beverage manufacturer, Biogro certified organic, also using cold-pressed organic fruits & vegetables; distributed across New Zealand; subscription service.

**Brief Description of NZ Juice Group:**
Juice processor; based in Hastings; exports to China and Taiwan.

**Brief Description of NZ Drinks:**
Bottled water manufacturer; dedicated, hi-tech automated water bottling facility sourcing water from the Hawke’s Bay, currently 1000m+ bottles for domestic market; capacity for 32,000 bottles/yr = 220m bottles/yr; private label plus branded production.

**Brief Description of Norton Road Organics:**
Organic produce and juice company based in the Hawke’s Bay; juice retail at select organic stores across New Zealand.
**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 403,000m³/yr.

**BRANDS**
OnePure

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

**CO. #**
3986438

**ADDRESS**
14/191 Queen Street, Grumble 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**
Successfully procuring and exporting a range of premium NZ products throughout Oceania; forging strong relationships with supply channels and working alongside premium NZ food brands; obtained a Certificate of Recognition from NZ Stay in addition to becoming a member of the New Zealand Fernmark Licence.

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**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 e-commerce and own retail store in Shanghai; Oranda Waters water manufacturing facility.

**BRANDS**
Oranda, Oranda 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**
$5m (+)

**Source:** Coriolis

**HIGHLIGHTS**

---

**OSOM FOODS**

**FOUNDER**
Abheek Patell

**DESCRIPTION**
Ayurvedic probiotic functional beverage, produced in Auckland.

**BRANDS**
Osom

**OWNERS**
Patell

**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 Artesian Award Finalist, 2018; Singapore Labels and Packaging Award- Gold, 2019

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**OTAKIRI SPRINGS**

**MANAGING DIRECTOR**
Jim Robertson

**DESCRIPTION**
Bottle water manufacturer; based in Whakatane.

**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 (Hangfu CN) proposed and expansion plans in pipeline, resource consent granted for 1 billion litres (up from 438m)
### PACIFIC ROOTS

**CO-FOUNDER**  
Zbigniew Dumienski

**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**  
Kunieli, Dumienski

**CO. #**  
7408696

**ADDRESS**  
Suite 3a 1.53 Stoddard Road, Mount Roskill, Auckland

**PHONE**  
+64 21 145 9609

**WEBSITE**  
www.pacificrootskava.com

**FOUNDED**  
2019

**STAFF #**  
+ SEASONAL #

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

**HIGHLIGHTS**  
Consented to take 140,000m³ water from Hawke’s Bay; invested in glass line; largest seller of 1L water in NZ; recently developed Collagen water in partnership with Adiakoko and marketing campaign with Rachel Hunter; only NZ producer of still canned water (fully recyclable)

### 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 soak water, wine, beer, aloe vera juice, coffee, juice

**BRANDS**  
Parkers, O Pure, Pure plus, 1835 Single Origin Coffee, Devina, Deca City, ABCD, Travelmate

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

**CO. #**  
$539761

**ADDRESS**  
38 Whakatiro Road, Hastings, Hawke’s Bay

**PHONE**  
+64 21 145 9609

**WEBSITE**  
www.parkers.kivi

**FOUNDED**  
2014

**STAFF #**  
12  
+ SEASONAL # 10

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

**HIGHLIGHTS**

### PETE’S NATURAL

**JOINT CEO’S**  
Peter & Marlene Blommaert

**DESCRIPTION**  
Boutique soft drink manufacturer; based in Nelson.

**KEY PRODUCTS**  
Soft drinks, sparkling water

**BRANDS**  
Pete’s Natural

**OWNERS**  
Blommaert, Suy

**CO. #**  
2266470

**ADDRESS**  
32 Hau Road, Matakohe, Nelson

**PHONE**  
+64 21 078 5738

**WEBSITE**  
www.petesnatural.co.nz

**FOUNDED**  
2009

**STAFF #**  
5  
+ SEASONAL #

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

**HIGHLIGHTS**

### PHORIC

**CO-OWNER**  
Bradley Hogan

**DESCRIPTION**  
“Clean” Energy Drink manufacturers using 100% natural ingredients, manufactured in Tauranga.

**KEY PRODUCTS**  
Energy Drink

**BRANDS**  
Phoric

**OWNERS**  
Hogan & Surich

**CO. #**  
5722608

**ADDRESS**  
164 Kauri Road, Whenuapai, Auckland

**PHONE**  
https://www.phoric.co.nz

**FOUNDED**  
2015

**STAFF #**  
2  
+ SEASONAL #

**REVENUE $M**  
$0 - $1m (2019) Est.  
Source: Corioli

**HIGHLIGHTS**
<table>
<thead>
<tr>
<th>Company</th>
<th>Description</th>
<th>Key Products</th>
<th>Owners</th>
<th>Revenue (2019)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plimmerton Kombucha</td>
<td>Kombucha beverage company based in Porirua, Wellington.</td>
<td>Kombucha ready to drink beverages</td>
<td>Ryan O'Connell</td>
<td>$0 - $1m</td>
</tr>
<tr>
<td>Middle-Earth</td>
<td>Middle Earth brand and website covering wine, cider and bottled water companies based in Brightwater, Nelson, three separate firms.</td>
<td>Bottled water (still and sparkling, 300ml &amp; 750ml), cider (canned), wine (bottles and cans)</td>
<td>Grey, O'Connell</td>
<td>$5 - $10m</td>
</tr>
<tr>
<td>Profruit (2006)</td>
<td>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.</td>
<td>Apple juice, kiwifruit juice, organic juice</td>
<td>Fehy 51%, Lambert 49%</td>
<td>$3 - $5m</td>
</tr>
<tr>
<td>Pure One</td>
<td>Plymouth, Taranaki; thermal spa and accommodation operations.</td>
<td>Bottled water</td>
<td>Coral Lambert</td>
<td>$1 - $2m</td>
</tr>
</tbody>
</table>
## RED SHOOTS

### Overview
- **Description**: Artesian beverage company producing cocktail mixers based in Auckland; supply supermarkets, liquor stores and Dan Murphy’s in Australia, bottle and mail packaging; also produce Lemonfresh, lemon and lime pouches.

### Key Products
- Juice mixers

### Brands
- Good Cocktail Co
- Lemon Fresh

### Ownership
- Co-owner: Rhona MacKenzie

### Contact Information
- **Address**: 11 Alberton Street, Auckland
- **Phone**: Not listed
- **Website**: [www.redshoots.co.nz](http://www.redshoots.co.nz)
- **Founded**: 2018
- **Staff**: 6
- **Highlights**: Voted by Metro magazine in 2019 as one of NZ’s best Kombuchas. Supplied New Zealanders from Dunedin to Whangarei with a traditionally brewed and bottled craft Kombucha. Completely natural and traditional Kombucha without food technology additives.

---

## RENE'S KOMBUCHA

### Overview
- **Description**: Certified organic (OFNZ) craft Kombucha manufacturer. Family-owned and operated in Northland. Glass/cordboard packaging and reusable 1L 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
- René's

### Ownership
- **Owners**: R Archner & L Miller

### Contact Information
- **Address**: 281A Mountain Road, Maungaturoto, Northland
- **Phone**: +64 9 431 8871
- **Website**: [www.reneskombucha.com](http://www.reneskombucha.com)
- **Founded**: 2013
- **Staff**: 2
- **Revenue**: $0.2 - $1m (2019)
- **Highlights**: Voted by Metro magazine in 2019 as one of NZ’s best Kombuchas. Supplied New Zealanders from Dunedin to Whangarei with a traditionally brewed and bottled craft Kombucha. Completely natural and traditional Kombucha without food technology additives.

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## SCALES CORPORATION

### Overview
- **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. 1.16bn of orchards; 3 packinghouses, 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, P Posy, Little Darlings, Fern Ridge Fresh, Profruit, Meateor Foods

### Ownership
- **Owners**: (NZX:SL) China Resources Nu Fung 15%, others

### Contact Information
- **Address**: 52 Cashel Street, Christchurch, Canterbury
- **Phone**: +64 3 379 7720
- **Website**: [www.scalescorporation.co.nz](http://www.scalescorporation.co.nz), [www.mrapple.co.nz](http://www.mrapple.co.nz), [www.meateor.co.nz](http://www.meateor.co.nz)
- **Founded**: 1897
- **Staff**: 715
- **Revenue**: $485m (2019)
- **Highlights**: Packed 4.7m trays of fruit; 5.95m trays of apples of juice sold ‘19; 110,970t petfood ingredients sold; EBIT $60m ‘19; launched Posy apple in China as Polarcold company for $151.4m in ‘18; sold bulk storage business Liqueo to SBT Group in ‘18; Alliance acquired 50% Meateor, formed JV ‘18; Dec ‘18 acquired 60% Shelby Foods (petfood ingredients)

---

## SHOTT BEVERAGES

### Overview
- **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

### Ownership
- **Owners**: Beverage Holdings 75%, Louisian family, Briere 13%, Jorden Custodias 7%, Shearer 5%

### Contact Information
- **Address**: 10 Kirkcaldy Street, Petone, Wellington
- **Phone**: +64 4 568 8701
- **Website**: [www.shottbeverages.com](http://www.shottbeverages.com), [www.quarterpast.com](http://www.quarterpast.com)
- **Founded**: 2006
- **Staff**: 37
- **Highlights**: Finalists in the 2018 Fine Food New Zealand Most Innovative Foodservice Product category; Opened new manufacturing facility in Auckland.
SKINNY FIZZ COMPANY

FOUNDER & CEO
Deli Lo

DESCRIPTION
Kombucha, Plant milk, Chocolate, Alcoholic kombucha, Plant-based convenience meals

KEY PRODUCTS
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 kombuchas in AU, NZ and UK, manufacturing based in Tauranga.

OWNERS
Back, key staff, others

CO. #
6475919

ADDRESS
4 Jackson Street, Petone, Wellington

PHONE
+64 27 529 6889

WEBSITE
www.soulfresh.co.nz

FOUNDED
2018

STAFF #
5 + SEASONAL #

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

HIGHLIGHTS
First released Dec 2018; Soulful Breakfast in 2020.

SOULFRESH NZ

FOUNDER & CEO
Didi Lo

DESCRIPTION
Premium syrups, bottled soda beverages

KEY PRODUCTS
BRANDS
Six Barrels Soda Co

OWNERS
Stewart 50%, Slater 50%

CO. #
2161660

ADDRESS
Lakes Lane, 40 Taraniaki Street, Te Ara, Wellington

PHONE
+64 22 077 9533

WEBSITE
www.sixbarrelsoda.co

FOUNDED
2008

STAFF #
6 + SEASONAL #

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

HIGHLIGHTS
Introducing Lofroth Kombucha cans in late 2019; Launched Beatleg Booth Alcoholic Kombuchas in early 2020

SPARKLING SPRING

CEO
George Putlin

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

KEY PRODUCTS
Bottled water, coolers, delivery

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
<table>
<thead>
<tr>
<th>Company</th>
<th>CEO &amp; MD</th>
<th>DESCRIPTION</th>
<th>KEY PRODUCTS</th>
<th>BRANDS</th>
<th>OWNERS</th>
<th>CO. #</th>
<th>ADDRESS</th>
<th>PHONE</th>
<th>WEBSITE</th>
<th>FOUNDED</th>
<th>STAFF #</th>
<th>REVENUE $M</th>
<th>HIGHLIGHTS</th>
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</thead>
<tbody>
<tr>
<td><strong>Stratosphere</strong></td>
<td>Richard Te Hurinui Jones</td>
<td>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.</td>
<td>Organic Soda Syrups, Kombucha Concentrate</td>
<td>Soda Press Co</td>
<td>Romeril Family; Soda Stream</td>
<td>1790052</td>
<td>2/38 Matakana Valley Road, Matakana, Auckland</td>
<td>+64 3 2653 444</td>
<td><a href="http://www.sodapressco.com">www.sodapressco.com</a></td>
<td>2013</td>
<td>$6 - $8m (2019)</td>
<td>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 2022; Winner of numerous international awards</td>
<td></td>
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<tr>
<td><strong>Taha Beverages</strong></td>
<td></td>
<td>Kavakava, ginger &amp; manuka honey flavoured sparkling beverage brand, leased in Otahuhu; hand-pick kavakava plant; distribution and sales partner in Hong Kong; distribution through NZ retailers (Fresh Choice, New World, Pak'n Save) plus tourist outlets, cafes, restaurants and bars; contract manufactured.</td>
<td>Sparkling tonic beverage</td>
<td>Taha</td>
<td>Jones 85%, Harman 15%</td>
<td>2442746</td>
<td>8 Lang View Crescent, Otahuhu, Auckland</td>
<td>+64 21 619 075</td>
<td><a href="http://www.taha.nz">www.taha.nz</a></td>
<td>2010</td>
<td>1</td>
<td>$0.5 - $1.5m (2019) Est. Source: Corioles</td>
<td></td>
</tr>
<tr>
<td><strong>The Antipodes Water Company</strong></td>
<td>Angelo Bagliss</td>
<td>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.</td>
<td>Still and sparkling bottled water</td>
<td>Antipodes</td>
<td>Woolley family, Shanks 42%, Greive 25%, Thorne family,Goddle 20%, Godde family 7%, Caesarian 8%</td>
<td>129268</td>
<td>106 Lewis Road, Whakatane, Bay of Plenty</td>
<td>+64 7 304 8452</td>
<td><a href="http://www.antipodes.co.nz">www.antipodes.co.nz</a></td>
<td>2003</td>
<td>11</td>
<td>$5 - $10m (2019) Est. Source: Corioles</td>
<td>Awarded champion sparkling water at The 28th Berkeley Springs International Water Tasting and Awards in 118; new CEO in May '19</td>
</tr>
<tr>
<td><strong>The Better Drinks Co</strong></td>
<td></td>
<td>Manufacturer, marketer and distributor of beverages; production sites in NZ and AU; distributor rights for Lipton Iced Tea and Benecos Energy Products in NZ; Pacific Islands; exports to over 13 countries.</td>
<td>Juice, Soft Drinks, iced tea, Energy Drinks, Water</td>
<td>Charlie’s, Phoenix Organics, Lipton Iced Tea, Cool Ridge, Juicy Lucy’s</td>
<td>Asahi Group via Asahi Holdings (AU)</td>
<td>969423</td>
<td>Suite 101, 1 Cleveland Road, Parnell, Auckland</td>
<td>+64 9 837 6740</td>
<td><a href="http://www.betterdrinks.co.nz">www.betterdrinks.co.nz</a> <a href="http://www.asahi.com.au">www.asahi.com.au</a> <a href="http://www.phoenixorganics.co.nz">www.phoenixorganics.co.nz</a></td>
<td>1999</td>
<td>100</td>
<td>$28m (2018) Source: AR18</td>
<td>Exclusive distribution rights announced in 2019 for Lipton Iced Tea; Total assets of $25m</td>
</tr>
<tr>
<td>COMPANY NAME</td>
<td>DESCRIPTION</td>
<td>OWNER</td>
<td>HIGHLIGHTS</td>
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<tr>
<td><strong>THE BEVERAGE BOUTIQUE</strong></td>
<td>Arterian water company based in Paeroa, (head office in Auckland); manufacturing, development, production, export and sales of private label water; exporting globally.</td>
<td>Dion Mortimer</td>
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<tr>
<td><strong>THE BROTHERS COLDPRESS</strong></td>
<td>Artisan juice company based in Wellington.</td>
<td>Roger Young</td>
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<tr>
<td><strong>THE FRESH FRUIT COMPANY OF NZ</strong></td>
<td>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 Tenderkirs Asparagus and partner with Leasing Rock Cherries (32 acres, 13 varieties); subsidiary Three Good Men grow and pack from three partners over 1,000ha, exporting 20,000t; Freshpak processed apple products operations.</td>
<td>Glenn Pool</td>
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</tr>
<tr>
<td><strong>THE HOMEGROWN JUICE COMPANY</strong></td>
<td>Manufacturer of raw cold pasteurised (HPP) juices; largest plantings of orange orchards in NZ, located in Otago and Hawkes Bay; retail and food service.</td>
<td>Stephen Brownlie</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>CO-OWNER</th>
<th>DESCRIPTION</th>
<th>BRANDS</th>
<th>OWNERS</th>
<th>CO.</th>
<th>ADDRESS</th>
<th>PHONE</th>
<th>WEBSITE</th>
<th>FOUNDED</th>
<th>STAFF</th>
<th>REVENUE</th>
<th>HIGHLIGHTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>THE BEVERAGE BOUTIQUE</strong></td>
<td></td>
<td>Plastic bottles of water</td>
<td>Mortimer</td>
<td>3471331</td>
<td>Paeroa, Waikato</td>
<td>+64 9 376 8999</td>
<td><a href="http://www.thebeverageboutique.co.nz">www.thebeverageboutique.co.nz</a></td>
<td>2015</td>
<td>29</td>
<td>$15 - $30m</td>
<td></td>
</tr>
<tr>
<td><strong>THE BROTHERS COLDPRESS</strong></td>
<td>Bottled juice beverages</td>
<td>The Brothers</td>
<td>Wastaf, Young</td>
<td>862002</td>
<td>2/19 Arthur Street, Te Aro, Wellington</td>
<td></td>
<td><a href="http://www.thebrotherscoldpress.com">www.thebrotherscoldpress.com</a></td>
<td>2015</td>
<td></td>
<td>$1 - $3m</td>
<td></td>
</tr>
<tr>
<td><strong>THE FRESH FRUIT COMPANY OF NZ</strong></td>
<td>Apples, squash, asparagus, cherries, fruit purees, apple juice, fruit pie mixes</td>
<td>Breeze, Sonya, Cheekie, Royal Joburn, proprietory apple varieties, Freshpak, Three Good Men</td>
<td>Ogilvy, Owen 43%, Mangan, Petter 45%, Pool family 10%</td>
<td>412966</td>
<td>46 Jervois Road, Horo Hake, Auckland</td>
<td>+64 9 376 9990</td>
<td><a href="http://www.freshco.co.nz">www.freshco.co.nz</a></td>
<td>1988</td>
<td>95</td>
<td>$30 - $50m</td>
<td></td>
</tr>
<tr>
<td><strong>THE HOMEGROWN JUICE COMPANY</strong></td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>GENERAL MANAGER</th>
<th>DESCRIPTION</th>
<th>BRANDS</th>
<th>OWNERS</th>
<th>CO.</th>
<th>ADDRESS</th>
<th>PHONE</th>
<th>WEBSITE</th>
<th>FOUNDED</th>
<th>STAFF</th>
<th>REVENUE</th>
<th>HIGHLIGHTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>THE FRESH FRUIT COMPANY OF NZ</strong></td>
<td>Manuacturer of raw cold pasteurised (HPP) juices; largest plantings of orange orchards in NZ, located in Otago and Hawkes Bay; retail and food service.</td>
<td>Kiwi Fresh Orange Co (Brownlie family)</td>
<td></td>
<td>4387684</td>
<td>407 Williams Street, Mahara, Hastings, Hawke’s Bay</td>
<td>+64 6 878 8140</td>
<td><a href="http://www.homegrownjuice.co.nz">www.homegrownjuice.co.nz</a></td>
<td>2013</td>
<td>80</td>
<td>$15 - $30m</td>
<td></td>
</tr>
</tbody>
</table>
## 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

<table>
<thead>
<tr>
<th>Brands</th>
<th>owners</th>
<th>Co. #</th>
<th>Address</th>
<th>Phone</th>
<th>Website</th>
<th>Founded</th>
<th>Staff #</th>
<th>Revenue $M</th>
<th>Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brod Kvas</td>
<td>Britsows</td>
<td>5747907</td>
<td>57 Sonter Road, Christchurch, Canterbury</td>
<td>+64 27 777 9867</td>
<td><a href="http://www.thekvasco.com">www.thekvasco.com</a></td>
<td>2015</td>
<td>2</td>
<td>$2 - $5m (2019) Est.</td>
<td>Source: Coriols</td>
</tr>
</tbody>
</table>

## THE ORGANIC MECHANIC

**Co-founder**  
Groedan Parker

**Description**  
Manufacturer of Kombucha, hemp.

**Key Products**  
Kombucha

<table>
<thead>
<tr>
<th>Brands</th>
<th>Owners</th>
<th>Co. #</th>
<th>Address</th>
<th>Phone</th>
<th>Website</th>
<th>Founded</th>
<th>Staff #</th>
<th>Revenue $M</th>
<th>Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td>OM</td>
<td>Parker, Liew, Joshi, Coriols</td>
<td>4511418</td>
<td>69 Saint Georges Bay Road, Papnell, Auckland</td>
<td>+61 21 027 07642</td>
<td><a href="http://www.organmechanic.co.nz">www.organmechanic.co.nz</a></td>
<td>2013</td>
<td>5</td>
<td>$1 - $5m (2019) Est.</td>
<td>Source: Coriols</td>
</tr>
</tbody>
</table>

## VIGOR & VITALITY

**CEO**  
Hayden Booker

**Description**  
Nondairy ‘milk’ manufacturer; nuts and seed based; based in Tauranga.

**Key Products**  
Nut and seed “mylk”, seeds

<table>
<thead>
<tr>
<th>Brands</th>
<th>Owners</th>
<th>Co. #</th>
<th>Address</th>
<th>Phone</th>
<th>Website</th>
<th>Founded</th>
<th>Staff #</th>
<th>Revenue $M</th>
<th>Highlights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vigor and Vitality</td>
<td>Booker</td>
<td>5124901</td>
<td>293 Cameron Road, Tauranga, Bay of Plenty</td>
<td>+64 22 353 4524</td>
<td><a href="http://www.vampilk.nz">www.vampilk.nz</a></td>
<td>2014</td>
<td>2</td>
<td>$0 - $2m (2019) Est.</td>
<td>Source: Coriols</td>
</tr>
</tbody>
</table>

## VISTA DRINKS/FREE-FLOW MANUFACTURING

**Co-founder**  
Scott Day

**Description**  
Flavoured sparkling water brand based in Auckland; partnership with Lion for sales and marketing; sister company Free-Flow Manufacturing a contract beverage manufacturing company, manufactures Vista.

**Key Products**  
Flavoured sparkling water

<table>
<thead>
<tr>
<th>Brands</th>
<th>Owners</th>
<th>Co. #</th>
<th>Address</th>
<th>Phone</th>
<th>Website</th>
<th>Founded</th>
<th>Staff #</th>
<th>Revenue $M</th>
<th>Highlights</th>
</tr>
</thead>
</table>

**Highlights**  
Gibbons acquires 25% ownership, Jan 19; partnership with Lion for sales and marketing of beverages, Feb 19, brings Vista into Lion Drink Collective division
<table>
<thead>
<tr>
<th>Company</th>
<th>Managing Director</th>
<th>Description</th>
<th>Key Products</th>
<th>Brands</th>
<th>Owners</th>
<th>Co. #</th>
<th>Address</th>
<th>Phone</th>
<th>Website</th>
<th>Founded</th>
<th>Staff #</th>
<th>Revenue $M (2019)</th>
<th>HIGHLIGHTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waikirika Kombucha</td>
<td>Harry Hurt</td>
<td>Wild harvest native plants kombucha beverages</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>$0.5 - $1m</td>
<td>Business for sale late 2019</td>
</tr>
<tr>
<td>Walter &amp; Wild</td>
<td>Alf Loreton</td>
<td>Soft drink manufacturer; factory store; own PET battle manufacturing on site; exports to Pacific Islands.</td>
<td>Soft drinks, honey drinks, cordials, syrups, bottled water, postmix</td>
<td>Alfa One, Aunt Betty's, Hansells, Vitafresh, Hubbards, Gregg's, F. Whitlock &amp; Sons, ViitaSport, The Coconut Collaborative, Tezo, Weight Watchers, I Love Pie, I Love Baking, Aunty's, Alfa One, Aunt Betty's, Hansells, Vitafresh, Hubbards, Gregg's, F. Whitlock &amp; Sons, ViitaSport, The Coconut Collaborative, Tezo, Weight Watchers, I Love Pie, I Love Baking, Aunty's,</td>
<td>Loretan family</td>
<td>1900019</td>
<td>135 Bay View Road, South Dunedin, Dunedin, Otago</td>
<td>+64 3 455 4448</td>
<td><a href="http://www.wests.co.nz">www.wests.co.nz</a></td>
<td>1876/2007</td>
<td>8</td>
<td>$5 - $10m</td>
<td>Business for sale late 2019</td>
</tr>
<tr>
<td>Wests (NZ)</td>
<td></td>
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<tr>
<td>Wild Dispensary</td>
<td>Ruth Vaughan</td>
<td>Natural health company based in Dunedin producing small batch wild herb formulas. Specialise in liquid tonics, functional vinegars as well as a therapeutic range.</td>
<td>Switchel and Fizcider (as functional beverage concentrated), liquid tonics, functional vinegars, therapeutic texture range</td>
<td>Wild Dispensary</td>
<td>Vaughan, Davies, Macfarlane</td>
<td>6200070</td>
<td>74 Signal Hill Road, Opoho, Dunedin, Otago</td>
<td>+64 21 183 0471</td>
<td><a href="http://www.wilddispensary.co.nz">www.wilddispensary.co.nz</a></td>
<td>2017</td>
<td>3</td>
<td>$0.5 - $3m</td>
<td></td>
</tr>
</tbody>
</table>
A broad range of organisations support the beverages industry

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

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

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

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

Source: Coriolis from industry websites
## GLOSSARY OF TERMS

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