Coffee in New Zealand

December 2025

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Coffee in New Zealand - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Inflation, global supply pressures and home-brewing culture shape category performance

INDUSTRY PERFORMANCE

Retail value sales of coffee increased in 2025, driven primarily by pricing dynamics and selective premium trading-up

Fresh coffee beans lead category dynamism as home-brewing culture deepens and premium quality expectations rise

WHAT'S NEXT?

Coffee expected to record steady value growth supported by premiumisation, home-café routines and diversified format innovation

Cold formats, concentrates and RTDs reshape usage occasions as younger consumers shift toward convenience and portability

Ethical sourcing and sustainability commitments continue to shape brand credibility and premium positioning

COMPETITIVE LANDSCAPE

Nestlé maintains leadership through portfolio breadth, strong household penetration and health-aligned innovation

Coffee Supreme emerges as the most dynamic company as it broadens accessibility and deepens consumer loyalty

CHANNELS

Supermarkets remain the dominant channel as value-seeking shoppers favour consolidated grocery missions and strong promotional cycles

E-commerce continues to expand as digital grocery growth and specialty roaster direct-to-consumer models reshape purchasing behaviour

CATEGORY DATA

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Hot Drinks in New Zealand - Industry Overview

EXECUTIVE SUMMARY

Inflationary pressures, shifting household priorities and values-driven purchasing shape market performance in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health and wellness trends reshape category innovation and influence purchasing behaviour

Sustainability commitments strengthen brand credibility and reinforce premium positioning

WHAT'S NEXT?

Hot drinks are set to record modest value growth as inflation eases and consumers refocus on purposeful premiumisation

Wellness shifts from a trend to an embedded expectation across all major categories

Sustainability, traceability and responsible packaging become mandatory components of brand credibility

COMPETITIVE LANDSCAPE

Jacobs Douwe Egberts NZ strengthens category leadership through portfolio breadth, home-brewing relevance and strategic innovation
Coffee remains the most dynamic category as home-brewing habits accelerate premiumisation and innovation

CHANNELS

Supermarkets consolidate their role as the dominant retail channel as households prioritise value, convenience and reliable availability
E-commerce emerges as the fastest-growing channel as digital ecosystems evolve and specialty roasters expand direct-to-consumer reach

FOODSERVICE VS RETAIL SPLIT

Foodservice demand remains subdued as cost pressures persist and consumers shift café habits into the home
Retail channel benefits from home-brewing culture and rising demand for premium and functional formats

MARKET DATA

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SOURCES

key markets, competitive environment and future outlook across a range of industries.

- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/coffee-in-new-zealand/report.