Tea in New Zealand

December 2025

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Tea in New Zealand - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation, wellness routines and provenance-led purchasing shape tea consumption in a year of elevated but stabilising prices

INDUSTRY PERFORMANCE

Retail value sales of tea increased in 2025 as premium cues, wellness positioning and provenance claims drove engagement despite cost pressures

Black tea reclaims momentum as provenance, authenticity and ethical sourcing strengthen consumer trust

WHAT'S NEXT?

Moderate value growth ahead as premium blends, ethical sourcing and wellness narratives underpin category resilience

Functional, benefit-led blends gain traction as consumers seek targeted health outcomes from everyday beverages

Iced and cold-brew tea expected to reshape consumption occasions as younger audiences embrace refreshing, café-inspired formats

COMPETITIVE LANDSCAPE

Dilmah deepens its market leadership through provenance, purpose-driven branding and strong emotional resonance with New Zealand consumers

CHANNELS

Supermarkets retain dominance as value, familiarity and in-store discovery drive purchase behaviour

E-commerce emerges as the fastest-growing channel as convenience, speciality curation and subscription models gain traction

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

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