Soft Drinks in New Zealand

January 2026

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Carbonates in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Modest volume growth for carbonates, with sales focussed on popular reduced-sugar options backed by promotions

INDUSTRY PERFORMANCE

Players attract attention with innovations in products and formats

Reduced sugar options align with overarching health and wellness trends

WHAT'S NEXT?

Carbonates set for measured volume growth as economic pressures ease

Health and wellness trends will drive innovation and sales

Sustainability set to become a structural driver of competitiveness in New Zealand carbonates

COMPETITIVE LANDSCAPE

Coca-Cola maintains leadership in carbonates through local scale, channel execution, and disciplined innovation

Natural Sugars benefits from the popularity of mixers, with its flagship Alchemy & Tonic brand

CHANNELS

Supermarkets maintains leading distribution channel place

Warehouse clubs continue to grow

CATEGORY DATA

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Concentrates in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of concentrates slump, reflecting a shift in demand based on health and convenience

INDUSTRY PERFORMANCE

Innovation in liquid concentrates aims to expand adult-led consumption occasions
Liquid concentrates manages to stay in a marginally positive performance

WHAT'S NEXT?

Concentrates expected to return to low positive volume growth, reflecting a widening range of consumption occasions
Health and wellness to structurally reshape concentrates demand, shifting growth toward low-sugar utility and at-home versatility
Sustainability trends to reinforce concentrates' relevance as an efficient, low-waste beverage format

COMPETITIVE LANDSCAPE

Barker Fruit Processors maintains lead through premium scale and capacity investment
Six Barrel Soda Co drives growth via craft-led expansion and operational reset

CHANNELS

Supermarkets anchor concentrates distribution thanks to wide consumer reach
Retail e-commerce continues to grow from a low base, with direct-to-consumer online sales particularly relevant for concentrates
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KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice maintains low positive volume growth, supported by new product developments and health and wellness trends

INDUSTRY PERFORMANCE

Innovations focus on low-sugar, organic, and functional attributes
Juice drinks show the strongest growth, benefitting from lower prices and new product developments

WHAT'S NEXT?

Juice sales expected to gradually decline over the forecast period
Not from concentrate 100% juice offers may become more popular
Opportunities continue for coconut water, due to low category maturity

COMPETITIVE LANDSCAPE

Frucor Suntory maintains its lead thanks to strength of overall portfolio and local production capabilities
Private label benefits from offering healthy juice options at affordable prices

CHANNELS

Supermarkets maintains dominant distribution channel lead for sales of juice
Retail e-commerce continues to grow, reflecting the ongoing rise of digital shopping

CATEGORY DATA

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RTD Coffee in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee maintains double-digit growth, supported by new product innovation and wider availability

INDUSTRY PERFORMANCE

Volume sales driven by RTD coffee being cheaper than café coffee, with premiumisation supporting value growth
Local innovation polarises around two clear strategies

WHAT’S NEXT?

RTD coffee set for sustained expansion as iced formats embed all-day, on-the-go consumption
RTD coffee competition to intensify as brands sharpen their positioning and defend relevance against adjacent functional drinks
Health-led fortification to drive premium growth in RTD coffee as brands target energy, satiety and functional benefits

COMPETITIVE LANDSCAPE

Suntory Boss maintains robust leadership in RTD coffee, thanks to being the first to launch
Allpress Espresso benefits from leveraging its range as an extension of the café culture

CHANNELS

Supermarkets maintains strong distribution channel lead for RTD coffee
Retail e-commerce continues to develop from a relatively small base

CATEGORY DATA

RTD Tea in New Zealand

Energy Drinks in New Zealand

Energy drinks achieves double-digit volume growth, thanks sustained new product development and category repositioning

INDUSTRY PERFORMANCE

New product launches fragment the category to address different needs

Reduced sugar energy drinks align with overall sugar moderation trend

WHAT'S NEXT?

Energy drinks set for sustained volume growth over the forecast period, supported by lifestyle-led expansion

Health and wellness-led innovation will continue to expand energy drinks' uses

Digital-first convenience to anchor repeat-led growth for energy drinks

COMPETITIVE LANDSCAPE

V maintains lead over Red Bull, while Red Bull engages in strong brand activity, and Coca-Cola benefits from its overall portfolio

The Musashi bus attracts attention with its LED display to showcase the Energy Amplified brand line

CHANNELS

Supermarkets drive energy drinks sales, reinforced by scale, value-led promotions and digital reach

Growth further supported by digitisation strategies and loyalty-linked offers

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports drinks benefit from widening consumption occasions

INDUSTRY PERFORMANCE

Clean-label, recovery-led sports drinks reshape the category beyond performance hydration

Reduced sugar sports drinks align with sugar moderation trends

WHAT'S NEXT?

Sports drinks shifts into a growth-stage lifestyle category, supported by broader penetration and health-led innovation

Digital retail execution strengthens visibility, conversion, and repeat purchasing for sports drinks

Health-led reformulation and cognitive functionality redefine sports drinks beyond performance hydration

COMPETITIVE LANDSCAPE

Coca-Cola maintains robust lead thanks to strong brand trust of Powerade

Small new entrants disrupt sports drinks with new formulations to meet a wider range of needs

CHANNELS

Supermarkets anchor sports drinks distribution, thanks to enabling wide consumer reach

Forecourt retailers benefit from meeting on-the-go hydration needs

CATEGORY DATA

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Asian Speciality Drinks in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of Asian speciality drinks return to positive growth, as the category continues to grow from an emergent base

INDUSTRY PERFORMANCE

Asian speciality drinks sales led by diaspora demand and Asian grocery expansion

Cultural crossovers and flavour-led trends expand the consumer audience

WHAT'S NEXT?

Asian speciality drinks to post steady, niche-led growth, driven by diaspora demand and flavour crossover rather than mainstream scale

Health-led innovation to drive selective penetration of Asian speciality drinks

Distribution expansion to unlock mainstream trials through Woolworths' international food strategy

COMPETITIVE LANDSCAPE

Asian speciality drinks remains fragmented, with growth driven by specialist retail and emerging brands rather than national leaders

Chinese beverage brands gain increasingly availability via Asian grocery chains

CHANNELS

Local grocery stores drive Asian speciality drinks growth, leading distribution through speed to market, range, and community reach

Supermarkets and e-commerce continue to grow share

CATEGORY DATA

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