



# Concentrates in New Zealand

January 2026

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## Concentrates in New Zealand - Category analysis

### 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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## Soft Drinks in New Zealand - Industry Overview

### EXECUTIVE SUMMARY

Volume sales see an uptick thanks to stabilising economic factors

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Health and wellness trends become the defining structural driver of soft drinks in New Zealand

Flavour innovation remains a critical driver of differentiation in soft drinks

Sustainability trends continue to rise across New Zealand's soft drinks market

## WHAT'S NEXT?

An ongoing positive performance driven by an improving economy and health-led trends

Future innovations will be backed by science-led claims

Distribution will become more strategic over the forecast period

## COMPETITIVE LANDSCAPE

Coca-Cola Amatil (NZ) Ltd maintains its overall company lead thanks to myriad strengths

Allpress Espresso benefits from translation café-style coffee into a RTD offer

## CHANNELS

Supermarkets maintains leading distribution channel place

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