



# RTD Tea in New Zealand

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## RTD Tea in New Zealand - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Sales of RTD tea return to flat volume growth, driven by carbonated RTD tea and kombucha

#### INDUSTRY PERFORMANCE

RTD tea benefits from health and wellness trends, albeit with competition from “better-for-you” categories

Carbonated RTD tea and kombucha meet demand for naturally positioned alternatives to carbonates

#### WHAT'S NEXT?

RTD teas set for modest growth, driven by carbonated formats while still tea remains niche

Matcha signals the next evolution of RTD tea, shifting growth toward café-led, wellness-driven relevance

RTD tea channel strategies to shift toward omnichannel discovery, premium signalling and digital-led trials

#### COMPETITIVE LANDSCAPE

Unilever benefits from long-standing presence of Lipton in still RTD tea

Smaller brands act as disruptors in RTD tea developments, supporting overall performance

#### CHANNELS

Supermarkets remain as the dominant distribution channel for RTD tea, thanks to mainstream visibility

Retail e-commerce continues to grow from a low base

#### CATEGORY DATA

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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  
Warehouse clubs and retail e-commerce continue to grow  
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