



Euromonitor
International

Spirits in New Zealand

August 2026

Table of Contents

Spirits in New Zealand - Category analysis

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Spirits Summary

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Spirits

INDUSTRY PERFORMANCE

Spirits Embrace Rtd Innovation to Offset Demand Shifts

Lighthouse Gin Amplifies Heritage Storytelling to Drive Premium Sales

Nolo and Rtd Launches Reshape Consumer Occasions and Value Perceptions

Chart 2 - Volume Sales 2020-2030

Chart 3 - Volume Sales by Category 2025

WHAT'S NEXT?

Consumers Shift to Brands with Value, Authenticity and Lighter Profiles

Cocktails and On-Premise Experiences Reshape Brand Influence and Trial

Premiumisation Driven by Provenance and Economic Recovery Fuels Value Growth

Chart 4 - Forecast Volume Sales 2020-2030

Chart 5 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Lion – Beer, Wine and Spirits (Nz) Maintains Lead as Premium Gin and Nolo Spirits Reshape Competition

Chart 6 - Company Shares 2025

Chart 7 - Brand Shares 2025

CHANNELS

Liquorland Expands Craft Corners to Fuel Premium Spirits Discovery

Online Discovery Accelerates Brand Storytelling, but Volume Stays Offline

ECONOMIC CONTEXT

Chart 8 - Economic Context for Spirits

Chart 9 - Real Gdp Growth 2020-2030

Chart 10 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 11 - Consumer Context for Spirits

Chart 12 - Population 2020-2030

Chart 13 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Alcoholic Drinks in New Zealand - Industry Overview

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 14 - Key Industry Trends for Alcoholic Drinks

INDUSTRY PERFORMANCE

Moderation and At-Home Consumption Curb Volume Sales
Rtds Outperform as Innovation and Convenience Win Consumer Interest
Zeffer 0% and Free Af?Drinks Attract Health-Focused Consumers with No-Alcohol Innovation
Chart 15 - Volume Sales 2020-2030
Chart 16 - Volume Sales by Category 2025

WHAT'S NEXT?

Health-Led and Mindful Product Options Expand as Demand for Moderation Rises
Pal'S and White Claw Sustain Rtds Growth as Beer Volume Declines
Supermarkets and Convenience Stores Gain Share as At-Home Occasions Rise
Chart 17 - Forecast Volume Sales 2020-2030
Chart 18 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Chart 19 - Analyst insight for Alcoholic Drinks
Lion - Beer, Wine & Spirits (Nz)And Db Breweries Lose Ground as Rtd Innovators Accelerate Share
Chart 20 - Company Shares 2025
Chart 21 - Brand Shares 2025

CHANNELS

Licensed Bottle Stores Extend Lead as At-Home Drinking Rises
Liquorland Online and Farro Fresh Drive Online Sales with Curated Ranges

MARKET BACKGROUND

Legislation
Legal Purchasing Age and Legal Drinking Age
Drink Driving
Advertising
Smoking Ban
Opening Hours
On-Trade Establishments

TAXATION AND DUTY LEVIES

OPERATING ENVIRONMENT

Contraband/Parallel Trade
Duty Free
Cross-Border/Private Imports

PRODUCTS

Coca-Cola Oceania and Zeffer Expand Wellness and Convenience with New Launches
Free Af and Pal's Gain Share by Targeting Mindful Drinkers

ECONOMIC CONTEXT

Chart 22 - Economic Context for Alcoholic Drinks
Chart 23 - Real Gdp Growth 2020-2030
Chart 24 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 25 - Consumer Context for Alcoholic Drinks
Chart 26 - Population 2020-2030
Chart 27 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the 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/spirits-in-new-zealand/report.