



Euromonitor
International

Bottled Water in New Zealand

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Bottled Water in New Zealand - Category analysis

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2025 DEVELOPMENTS

Bottled water sees a return to low volume growth, reflecting stabilising demand

INDUSTRY PERFORMANCE

Bottled water sales led by sparkling flavour innovations and value-driven hydration

Functional and sparkling flavoured bottled water attract consumer attention, competing with sports drinks and carbonates

WHAT'S NEXT?

Bottled water sales set to rise over the forecast period, with functional and sparkling flavoured options remaining popular

Digital and technology adoption to underpin efficiency, sustainability and on-the-go occasions

Health and wellness trends will drive growth through functional upgrades and everyday hydration

COMPETITIVE LANDSCAPE

Coca-Cola maintains its leadership over NZ Drinks due to strength of its overall portfolio

Aqua Lite continues to benefit from multiple strategies in sparkling flavoured bottled water

CHANNELS

Supermarkets maintains strongest distribution channel lead

E-commerce continues to grow, supported by digitally enabled convenience and forecourt retail

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Soft Drinks in New Zealand - Industry Overview

EXECUTIVE SUMMARY

Volume sales see an uptick thanks to stabilising economic factors

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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

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Supermarkets maintains leading distribution channel place

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