



Euromonitor
International

Other Hot Drinks in Australia

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Inflationary pressure, cocoa volatility, and rising wellness trends shape category performance

INDUSTRY PERFORMANCE

High cocoa prices and health-led consumer behaviour constrain chocolate-based powders
Matcha latte emerges as the most dynamic segment as functional and lifestyle trends boost appeal

WHAT'S NEXT?

Modest category growth expected despite ongoing commodity volatility and rising competition
Functional diversification becomes central to category innovation as consumers seek nutritional indulgence
Sustainability becomes a key lever of differentiation as consumers expect planet-friendly indulgence

COMPETITIVE LANDSCAPE

Nestlé maintains leadership through strong brand equity, domestic production, and functional expansion
Morning Made accelerates growth through wellness positioning, digital engagement, and national retail expansion

CHANNELS

Supermarkets remain the primary distribution channel, supported by broad reach and health-led assortment expansion
E-commerce grows rapidly as convenience, digital discovery, and D2C models expand category reach

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EXECUTIVE SUMMARY

Hot drinks maintain steady value growth amid inflation easing and shifting consumer priorities

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health, functionality and clean-label trends reshape product development
Ethical sourcing and sustainability strengthen brand positioning
Matcha shifts from niche trend to mainstream staple

WHAT'S NEXT?

Outlook shaped by stabilising prices, renewed confidence and evolving consumer priorities
Functional reformulation and wellness-led innovation to accelerate
Sustainability set to become a baseline expectation

COMPETITIVE LANDSCAPE

Nestlé maintains category leadership through breadth, innovation and domestic investment
Coffee stands as the most dynamic category, fuelled by both premium and affordable innovation

CHANNELS

Supermarkets remain the dominant channel supported by value seeking and private label expansion
E-commerce remains the fastest-growing channel through expanded fulfilment and digitally led retail execution

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