



HW Hot Drinks in Australia

December 2025

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KEY DATA FINDINGS

2024 DEVELOPMENTS

Functional innovation and clean-label expectations redefine hot drinks wellness

INDUSTRY PERFORMANCE

Functional benefits gain momentum across other hot drinks and tea
Natural positioning remains relevant but increasingly overlaps with premium and sustainable cues
No sugar expands from indulgent powders into more everyday hot drink occasions

WHAT'S NEXT

Functional hot drinks expand into targeted wellbeing, including mental health
Natural hot drinks recover through sharper positioning and stronger value propositions
No sugar becomes more mainstream as taste improves and permissible indulgence grows

CATEGORY DATA

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EXECUTIVE SUMMARY

Health and wellness in Australia pivots towards sugar reduction, functionality and credible everyday benefits

INDUSTRY PERFORMANCE

Sugar reduction and metabolic health concerns shape category-wide performance
Functionality, gut health and protein move health and wellness beyond avoidance

WHAT'S NEXT?

Mainstream integration of functional, lower-sugar and clean-label products will drive future growth

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