



# 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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Health and Wellness in Australia - Industry Overview

## 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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