



Passport

Asian Speciality Drinks in Australia

Euromonitor International

February 2022

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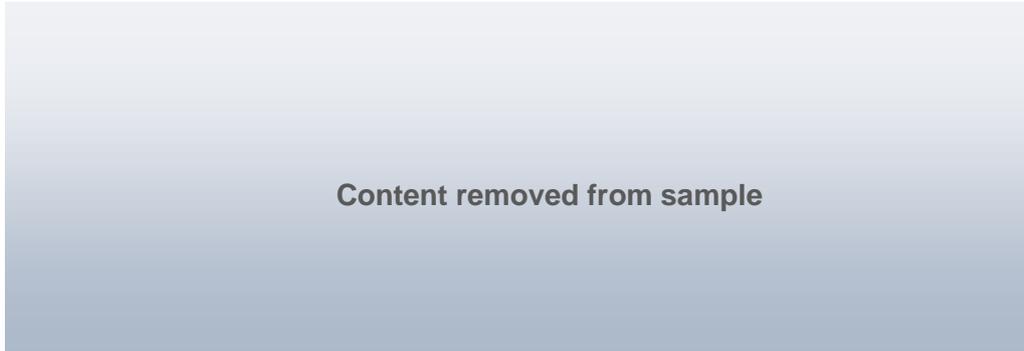
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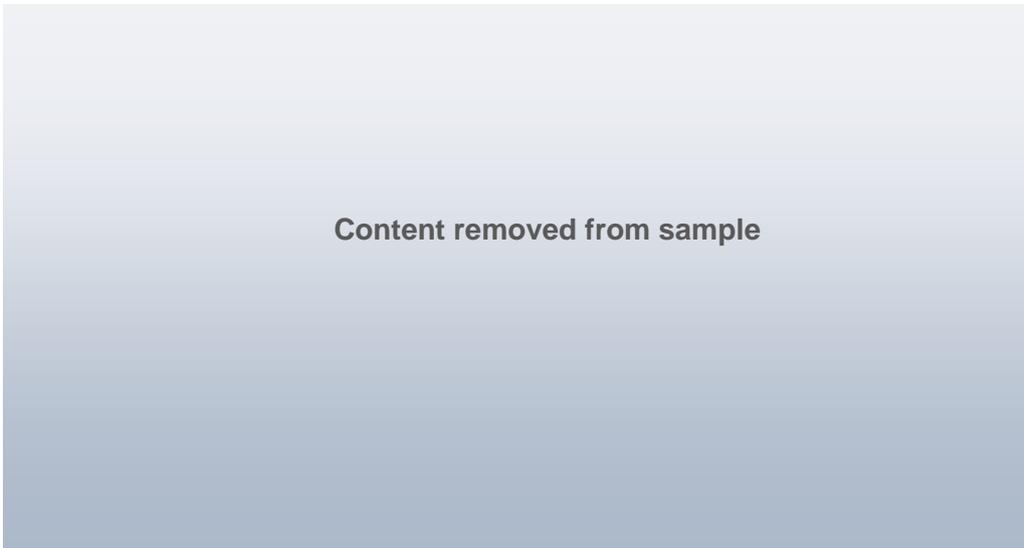
ASIAN SPECIALITY DRINKS IN AUSTRALIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

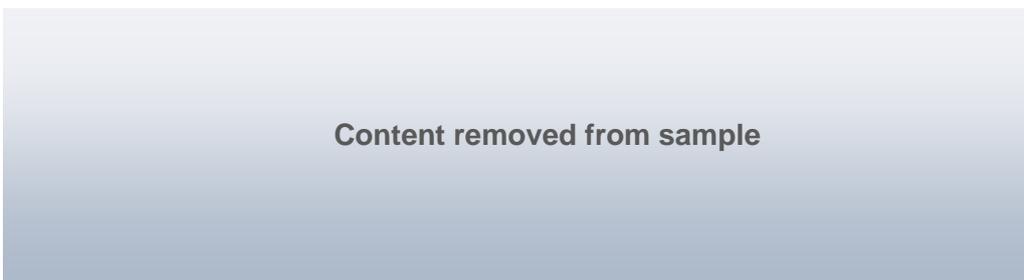


2021 DEVELOPMENTS

Asian speciality drinks goes mainstream

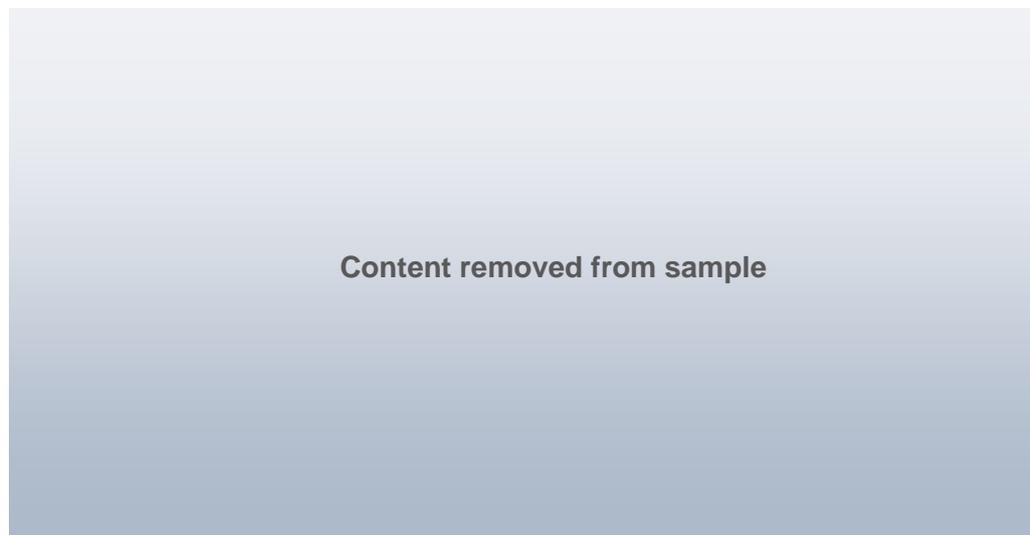


Asian speciality drinks suffers on-trade troubles due to the pandemic

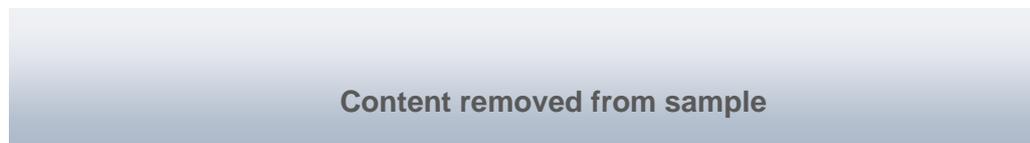


PROSPECTS AND OPPORTUNITIES

Opening up of Australian borders will help Asian speciality drinks grow



Reopening of restaurants will see positive growth for on-trade sales of Asian speciality drinks



CATEGORY DATA

Table 1 Off-trade Sales of Asian Speciality Drinks: Volume 2016-2021

million litres

	2016	2017	2018	2019	2020	2021
Asian Speciality Drinks	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Off-trade Sales of Asian Speciality Drinks: Value 2016-2021

AUD million

	2016	2017	2018	2019	2020	2021
Asian Speciality Drinks	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2016-2021

% volume growth

2020/21 2016-21 CAGR 2016/21 Total

Asian Speciality Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Off-trade Sales of Asian Speciality Drinks: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

Asian Speciality Drinks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Off-trade Asian Speciality Drinks: % Volume 2017-2021

% off-trade volume
Company

2017 2018 2019 2020 2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Off-trade Asian Speciality Drinks: % Volume 2018-2021

% off-trade volume
Brand (GBO)

Company (NBO) 2018 2019 2020 2021

Data removed from sample

Source: Trade Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 NBO Company Shares of Off-trade Asian Speciality Drinks: % Value 2017-2021

% off-trade value rsp Company	2017	2018	2019	2020	2021
----------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 LBN Brand Shares of Off-trade Asian Speciality Drinks: % Value 2018-2021

% off-trade value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
--------------------------------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 9 Forecast Off-trade Sales of Asian Speciality Drinks: Volume 2021-2026

million litres	2021	2022	2023	2024	2025	2026
Asian Speciality Drinks	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Off-trade Sales of Asian Speciality Drinks: Value 2021-2026

AUD million	2021	2022	2023	2024	2025	2026
Asian Speciality Drinks	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2021-2026

% volume growth

2021/22 2021-26 CAGR 2021/26 Total

Asian Speciality Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Off-trade Sales of Asian Speciality Drinks: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

Asian Speciality Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

SOFT DRINKS IN AUSTRALIA - INDUSTRY OVERVIEW

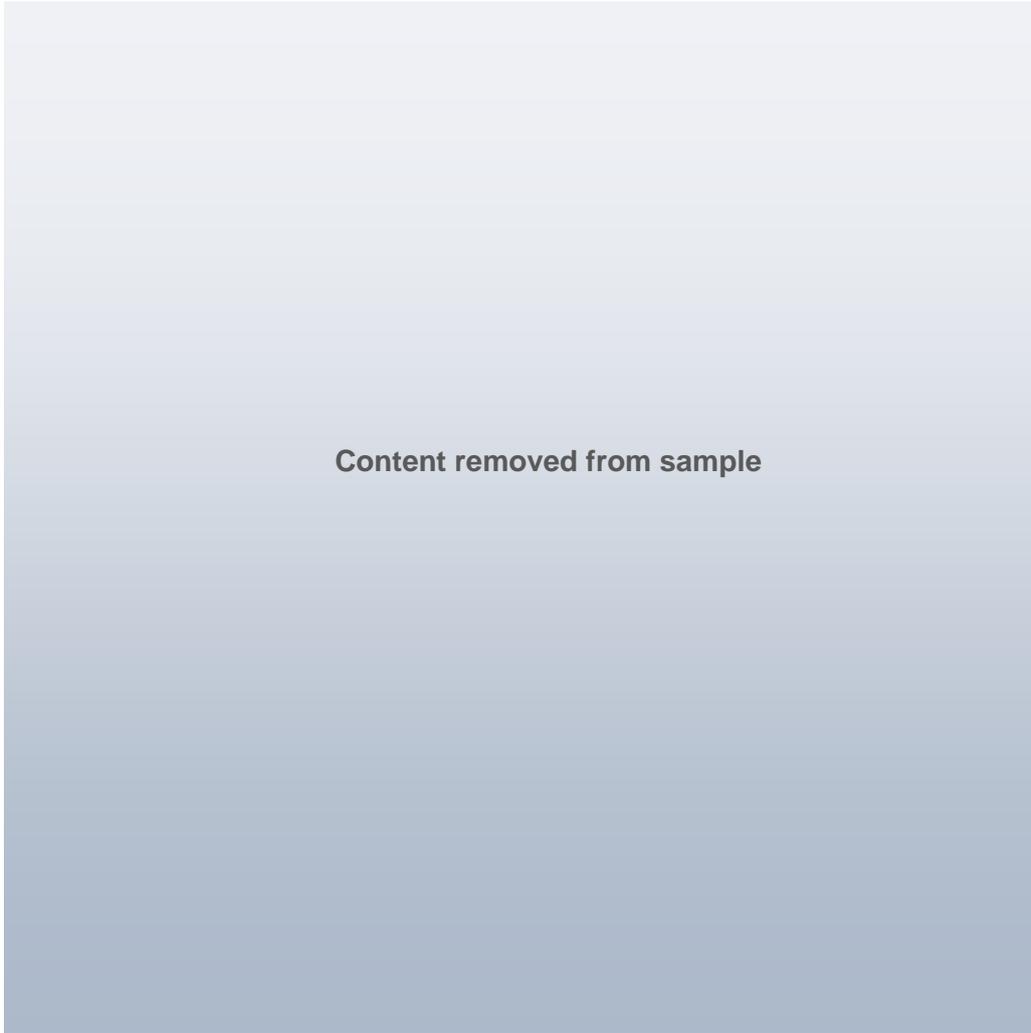
EXECUTIVE SUMMARY

Soft drinks in 2021: The big picture

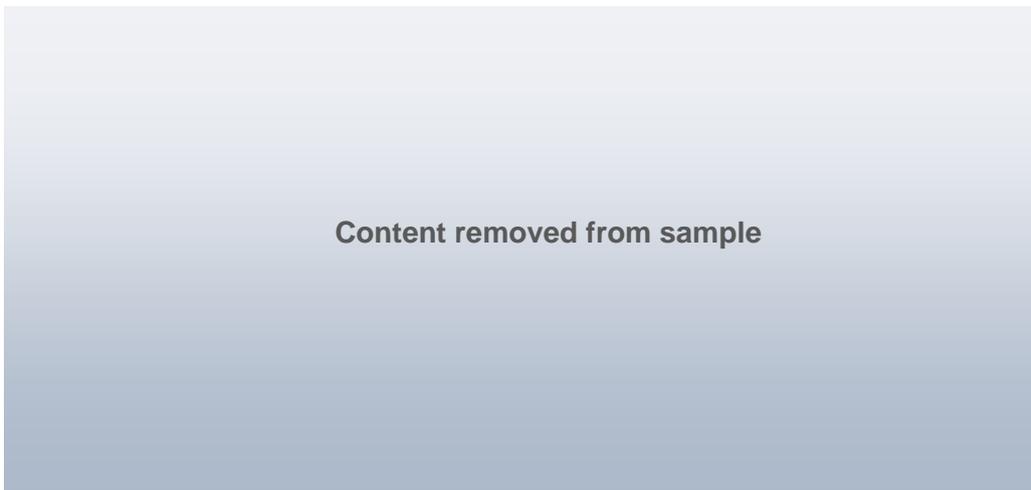
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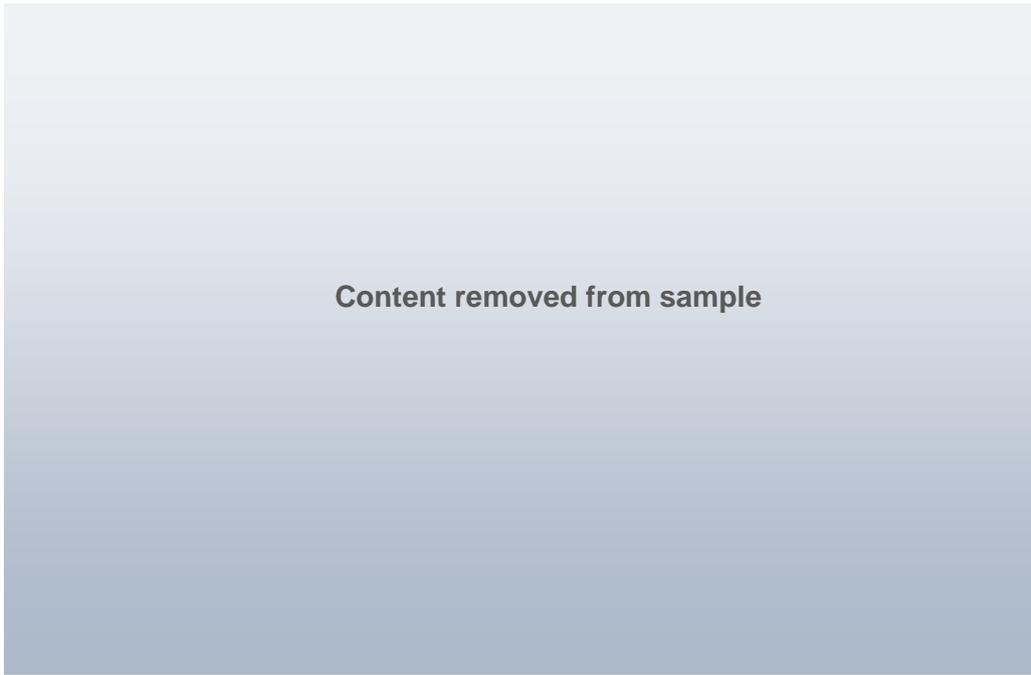
2021 key trends

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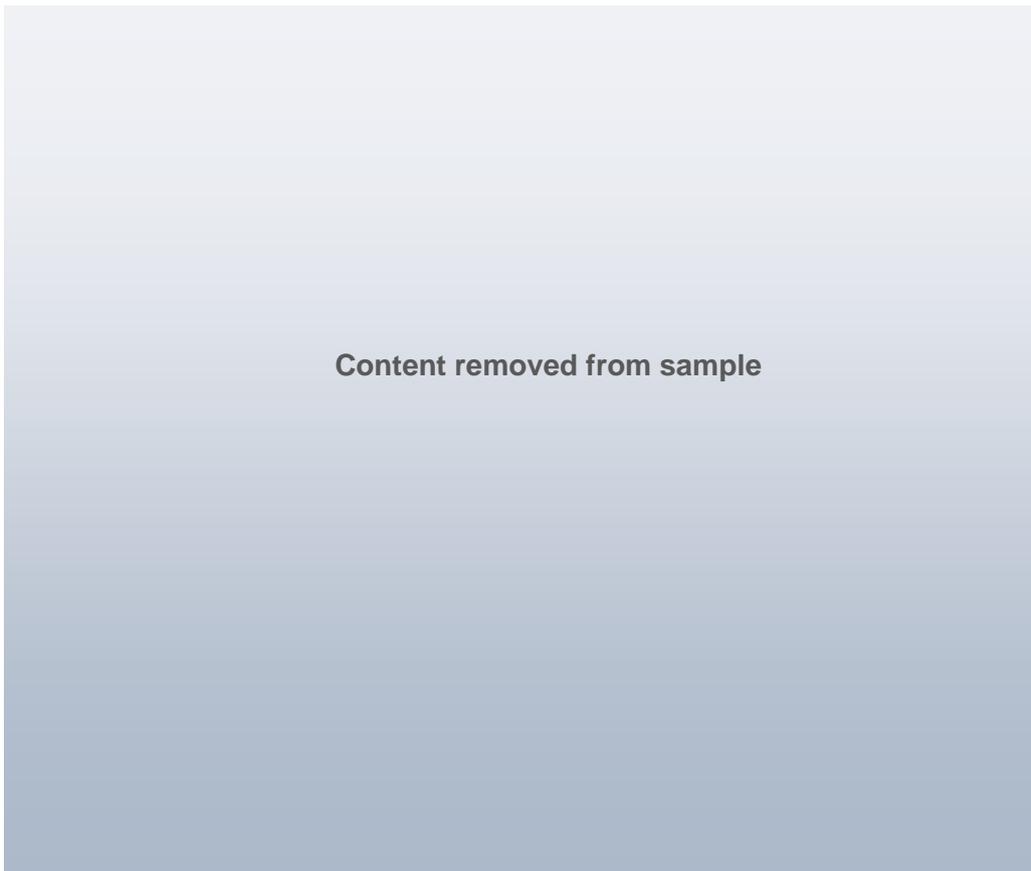


Competitive landscape

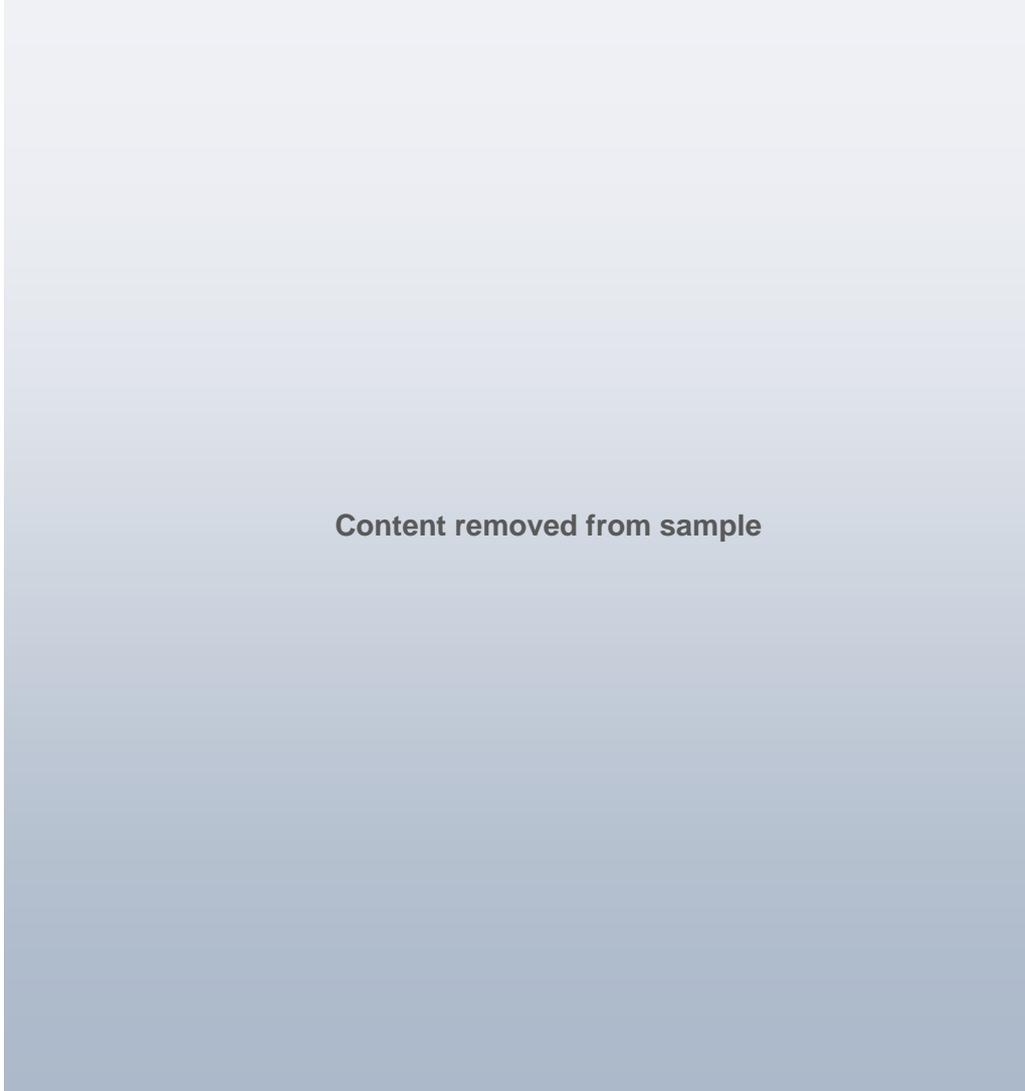




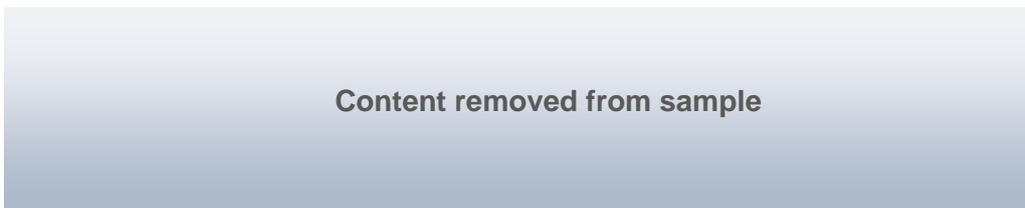
Retailing developments



Foodservice vs retail split



What next for soft drinks?



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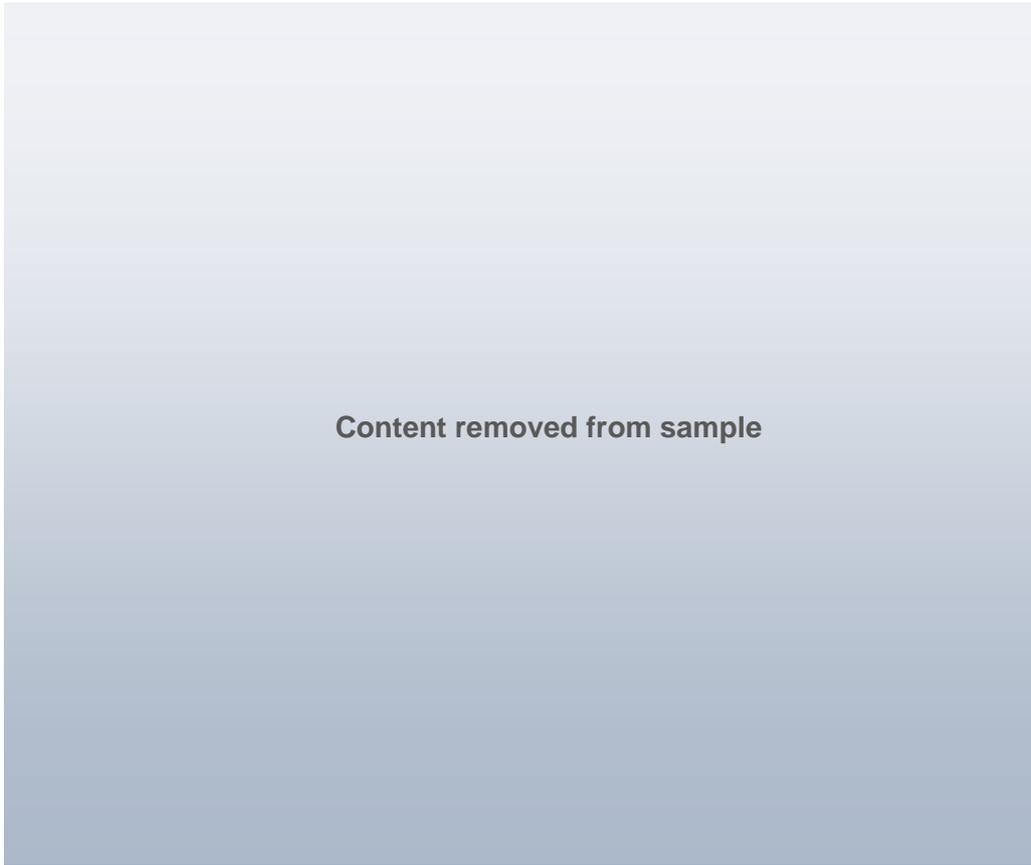
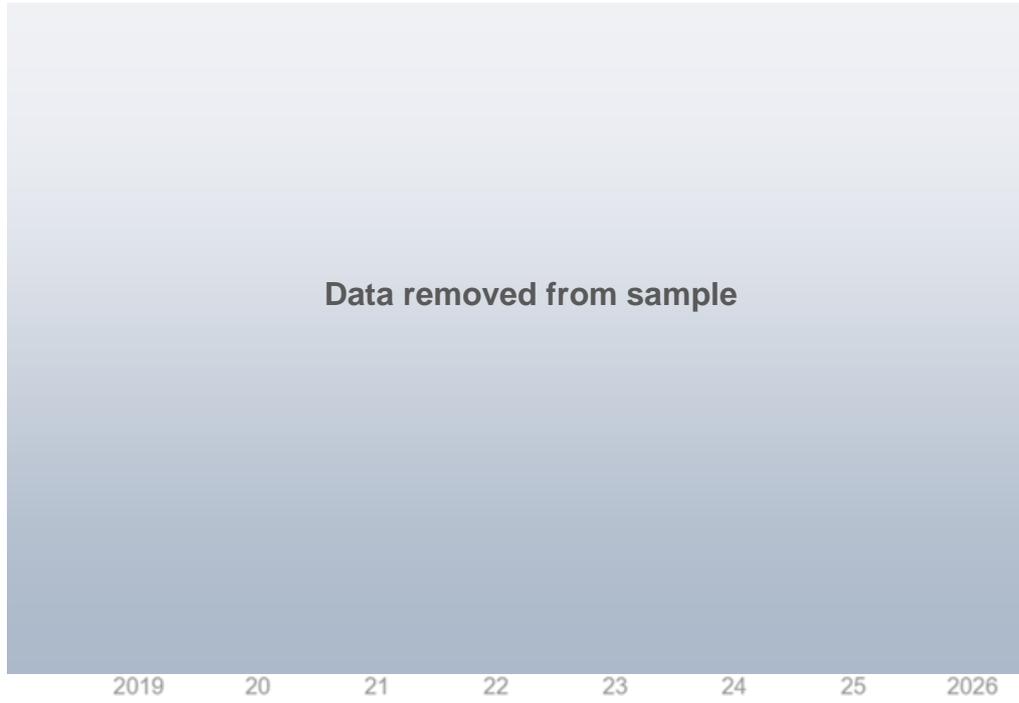


Chart 1 Soft Drinks Off-Trade Volume Sales Growth Scenarios: 2019-2026

Off-Trade Volume Sales, Retail Volume, 2019 - 2026

Soft Drinks - Australia

Passport Baseline C19 Pessimistic1



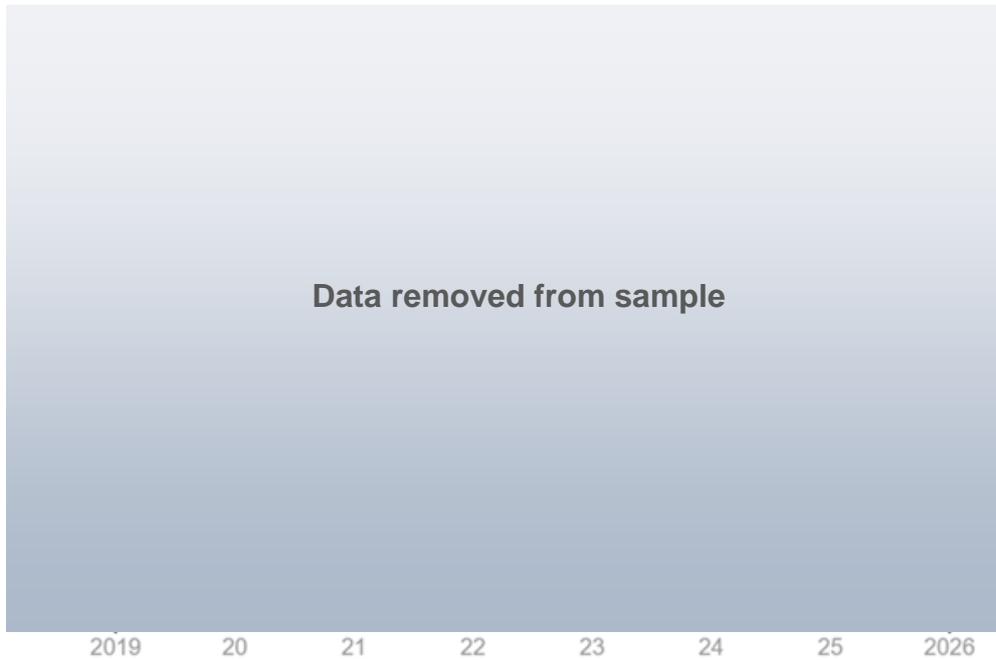
Source: Euromonitor International Industry Forecast Model

Chart 2 Soft Drinks On-Trade Volume Sales Growth Scenarios: 2019-2026

On-Trade Volume Sales, Retail Volume, 2019 - 2026

Soft Drinks - Australia

Passport Baseline C19 Pessimistic1



Source: Euromonitor International Industry Forecast Model

Chart 3 Soft Drinks Impact of Drivers on Off-Trade Volume Sales: 2019-2026

Off-Trade Volume Sales Retail Volume 2019 - 2026

Australia - Soft Drinks

Off-Trade Volume Sales Growth

Passport Baseline

Driver effects

GDP Per Capita

Product Price

Habit Persistence

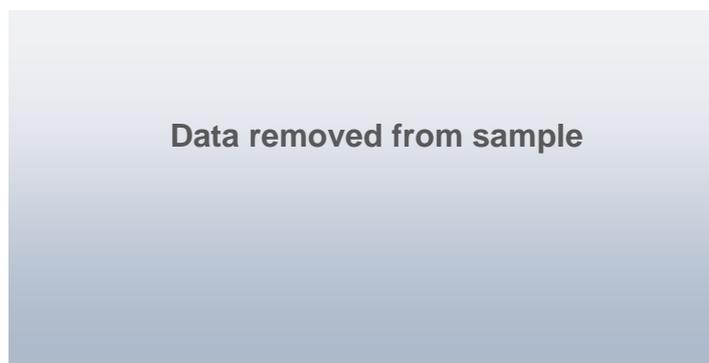
Population

Demographics

(Millennials; Share of Households of a Couple with Children)

Soft Drivers

(- Competition; + Lifestyle trends)



Source: Euromonitor International Industry Forecast Model

Chart 4 Soft Drinks Impact of Drivers on On-Trade Volume Sales: 2019-2026

On-Trade Volume Sales Retail Volume 2019 - 2026

Australia - Soft Drinks

On-Trade Volume Sales Growth

○ Passport Baseline

Driver effects

■ GDP Per Capita

■ Product Price

■ Habit Persistence

■ Population

■ Demographics

(Population Ageing; Share of Baby Boomers)

■ Climate

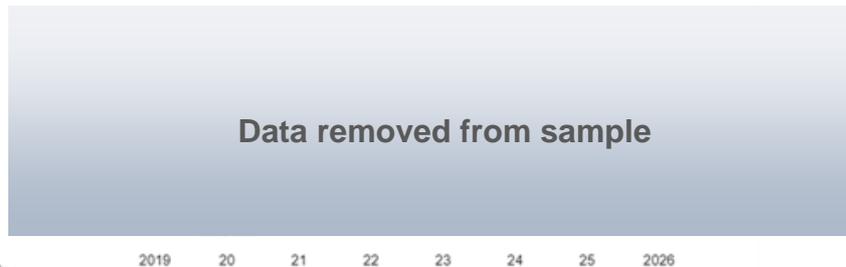
(Average Summer Max Temperature; Mean Maximum Temperature)

■ Market Environment

(Cafés/Bars Transactions per Capita; Consumer Foodservice Outlets Through Standalone; Consumer Foodservice Outlets Through Travel; Consumer Foodservice Transactions per Capita; Fast Food Transactions per Capita; Foodservice Alcoholic Drinks Volume; Number of Cafés; Vodka Foodservice Volume Sales per Capita)

■ Soft Drivers

(- Competition; + Product variety)



Source: Euromonitor International Industry Forecast Model

MARKET DATA

Table 13 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2016-2021

million litres

	2016	2017	2018	2019	2020	2021
Off-trade	Data removed from sample					
On-trade						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2016-2021

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	Data removed from sample		
On-trade			
Total			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2016-2021

AUD million	2016	2017	2018	2019	2020	2021
Off-trade	Data removed from sample					
On-trade						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2016-2021

% constant value growth	2020/21	2016-21 CAGR	2016/21 Total
Off-trade	Data removed from sample		
On-trade			
Total			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2020

million litres	Off-trade	On-trade	Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Excludes powder concentrates

Table 18 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2020

% volume analysis

	Off-trade	On-trade	Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Excludes powder concentrates

Table 19 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2020

AUD million

	Off-trade	On-trade	Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2020

% value analysis

	Off-trade	On-trade	Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2016-2021

million litres

	2016	2017	2018	2019	2020	2021
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 22 Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2016-2021

% volume growth

	2020/21	2016-21 CAGR	2016/21 Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 Off-trade Sales of Soft Drinks by Category: Value 2016-2021

AUD million

	2016	2017	2018	2019	2020	2021
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 Off-trade Sales of Soft Drinks by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Bottled Water	Data removed from sample		
Carbonates			
Concentrates			
Juice			
RTD Coffee			
RTD Tea			
Energy Drinks			
Sports Drinks			
Asian Speciality Drinks			
Soft Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Sales of Soft Drinks by Total Fountain On-trade: Volume 2016-2021

million litres	2016	2017	2018	2019	2020	2021
Total Fountain On-trade	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2016-2021

% fountain volume growth	2020/21	2016-21 CAGR	2016/21 Total
Total Fountain On-trade	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2017-2021

% off-trade volume Company	2017	2018	2019	2020	2021
Data removed from sample					

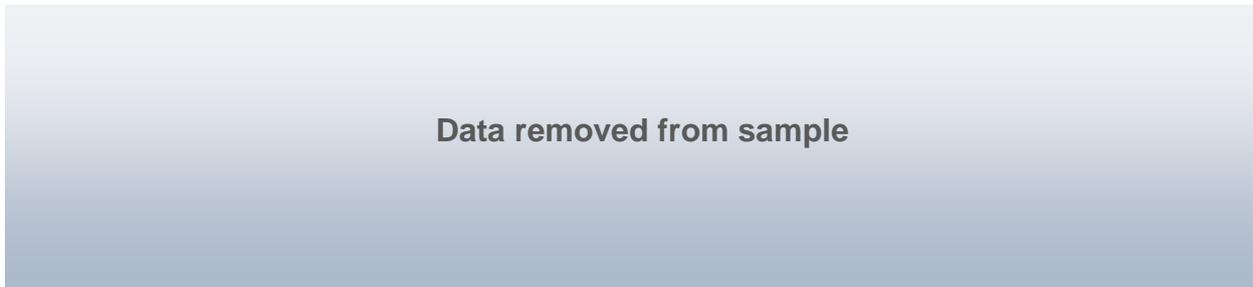
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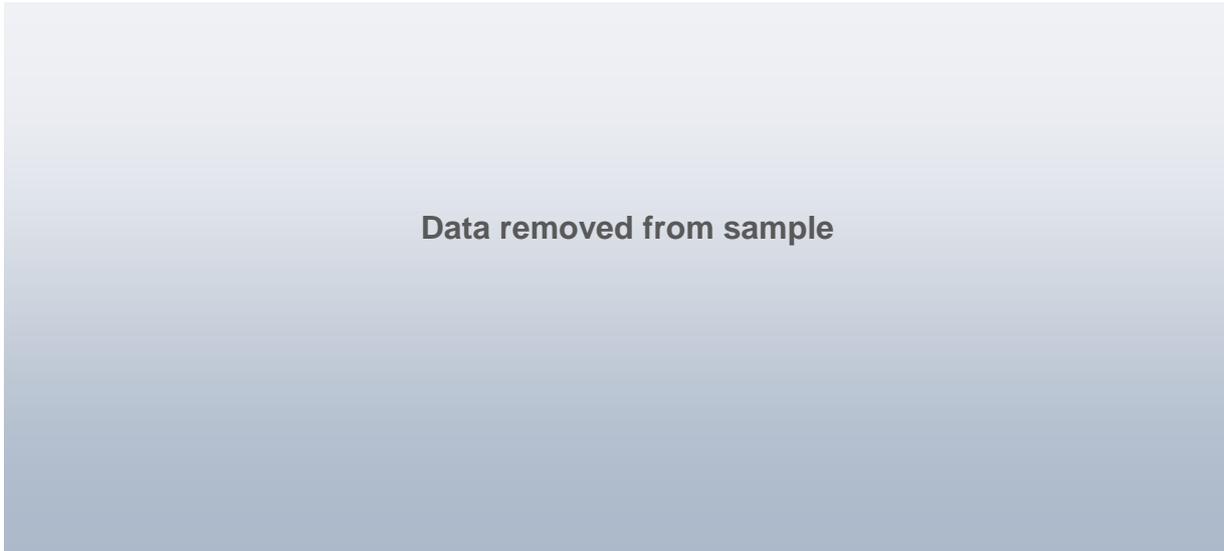
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2018-2021

% off-trade volume Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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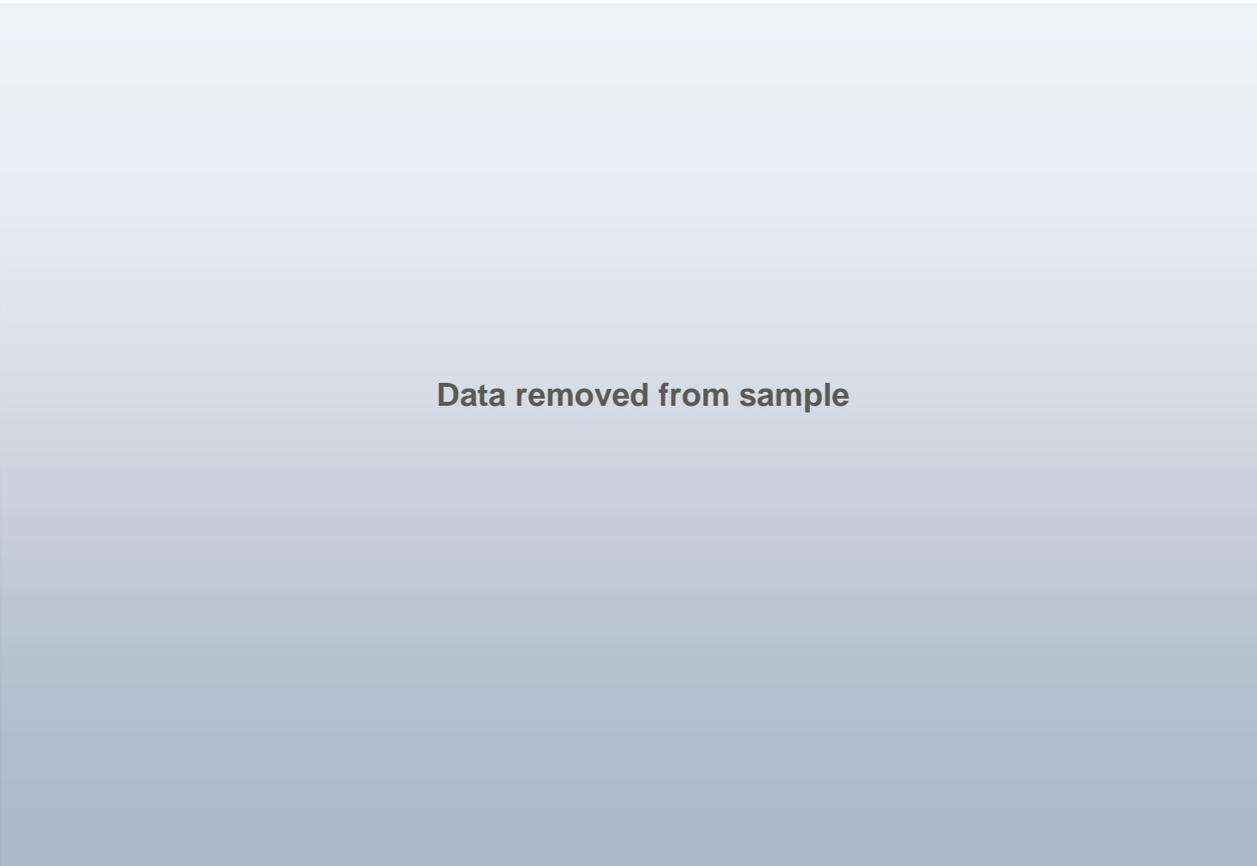
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 29 NBO Company Shares of Off-trade Soft Drinks: % Value 2017-2021

% off-trade value rsp Company	2017	2018	2019	2020	2021
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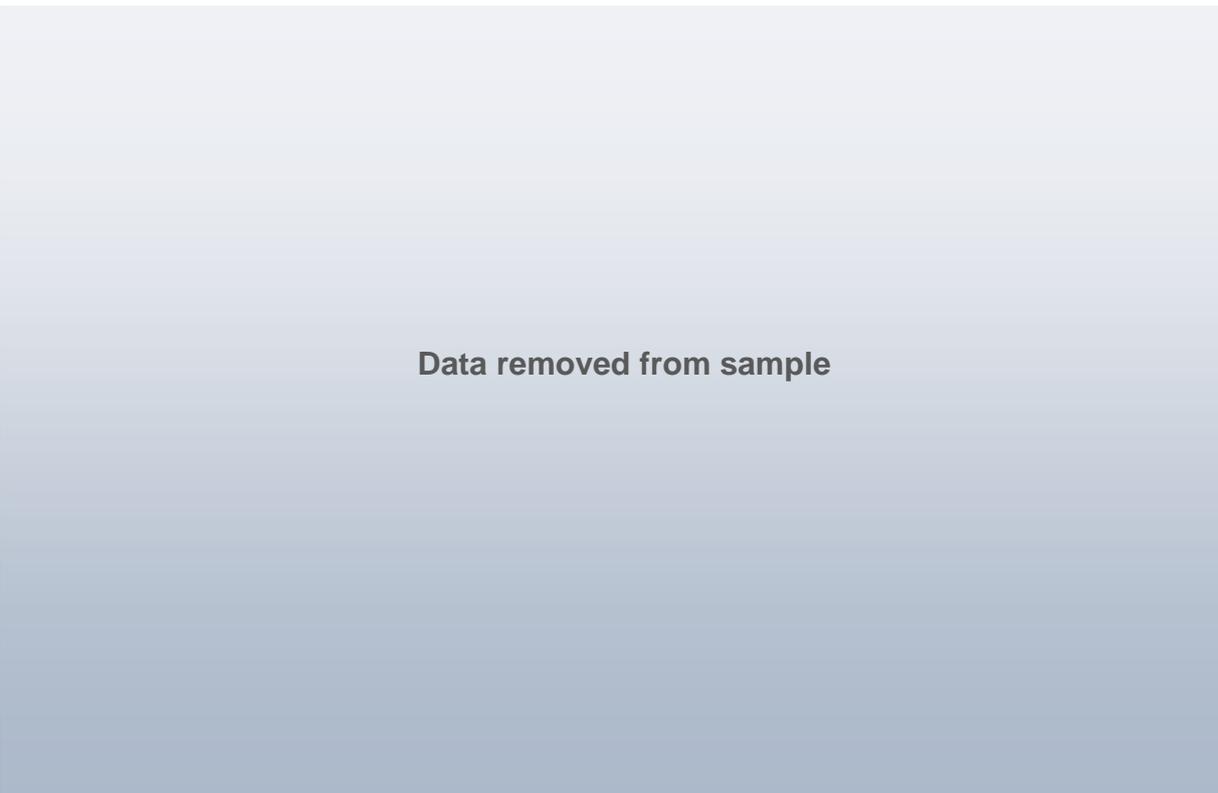




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 30 LBN Brand Shares of Off-trade Soft Drinks: % Value 2018-2021

% off-trade value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 31 Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2016-2021

% retail rtd volume	2016	2017	2018	2019	2020	2021
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Energy Drinks						
Juice						
RTD Tea						
Soft Drinks						
Sports Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 32 Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Energy Drinks						
Juice						
RTD Tea						
Soft Drinks						
Sports Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 33 Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2016-2021

% off-trade

	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Mixed Retailers						
- Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 34 Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2021

% off-trade	BW	C	Con	F/VJ	RTD C	RTD T
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Food/drink/tobacco specialists						
--- Independent Small Grocers						
--- Other Grocery Retailers						
- Mixed Retailers						
- Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						

- Direct Selling
Total

Data removed from sample

ED SPD ASD

Store-Based Retailing
- Grocery Retailers
-- Modern Grocery Retailers
--- Convenience Stores
--- Discounters
--- Forecourt Retailers
--- Hypermarkets
--- Supermarkets
-- Traditional Grocery Retailers
--- Food/drink/tobacco specialists
--- Independent Small Grocers
--- Other Grocery Retailers
- Mixed Retailers
- Non-Grocery Specialists
Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: BW = bottled water; CB = carbonates; CN = concentrates; JU = juice; RTDC = RTD coffee; RTDT = RTD tea; ED = energy drinks; SPD = sports drinks; ASD = Asian speciality drinks

Note: Excludes powder concentrates

Table 35 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2021-2026

million litres

2021 2022 2023 2024 2025 2026

Off-trade
On-trade
Total

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 36 Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2021-2026

% volume growth

2021/22 2021-26 CAGR 2021/26 Total

Off-trade
On-trade
Total

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 37 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2021-2026

AUD million	2021	2022	2023	2024	2025	2026
Off-trade	Data removed from sample					
On-trade						
Total						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 38 Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2021-2026

% constant value growth	2021/22	2021-26 CAGR	2021/26 Total
Off-trade	Data removed from sample		
On-trade			
Total			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 39 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2021-2026

million litres	2021	2022	2023	2024	2025	2026
Bottled Water	Data removed from sample					
Carbonates						
Concentrates						
Juice						
RTD Coffee						
RTD Tea						
Energy Drinks						
Sports Drinks						
Asian Speciality Drinks						
Soft Drinks						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: Excludes powder concentrates

Table 40 Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2021-2026

% volume growth	2021/22	2021-26 CAGR	2021/26 Total
Bottled Water	Data removed from sample		
Carbonates			

Concentrates
 Juice
 RTD Coffee
 RTD Tea
 Energy Drinks
 Sports Drinks
 Asian Speciality Drinks
 Soft Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note: Excludes powder concentrates

Table 41 Forecast Off-trade Sales of Soft Drinks by Category: Value 2021-2026

AUD million

2021 2022 2023 2024 2025 2026

Bottled Water
 Carbonates
 Concentrates
 Juice
 RTD Coffee
 RTD Tea
 Energy Drinks
 Sports Drinks
 Asian Speciality Drinks
 Soft Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 42 Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

Bottled Water
 Carbonates
 Concentrates
 Juice
 RTD Coffee
 RTD Tea
 Energy Drinks
 Sports Drinks
 Asian Speciality Drinks
 Soft Drinks

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 43 Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2021-2026

million litres

2021 2022 2023 2024 2025 2026

Total Fountain On-trade

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

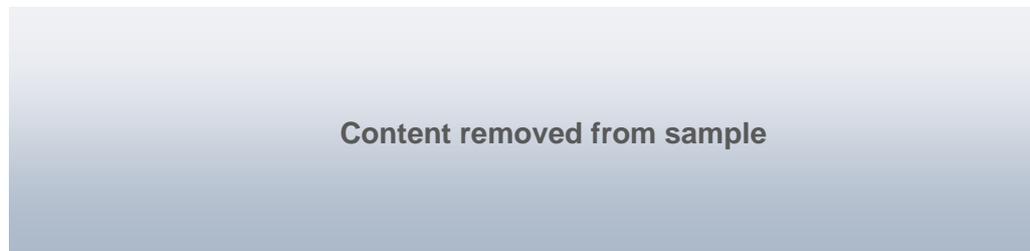
Table 44 Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2021-2026

% fountain volume growth	2021/22	2021-26 CAGR	2021/26 Total
Total Fountain On-trade	Data removed from sample		

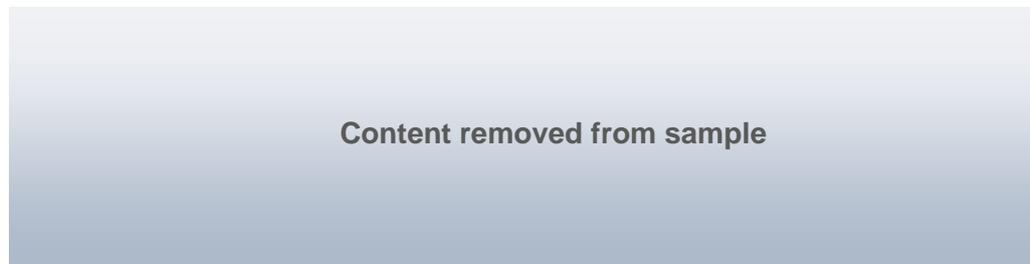
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

APPENDIX

Fountain sales in Australia



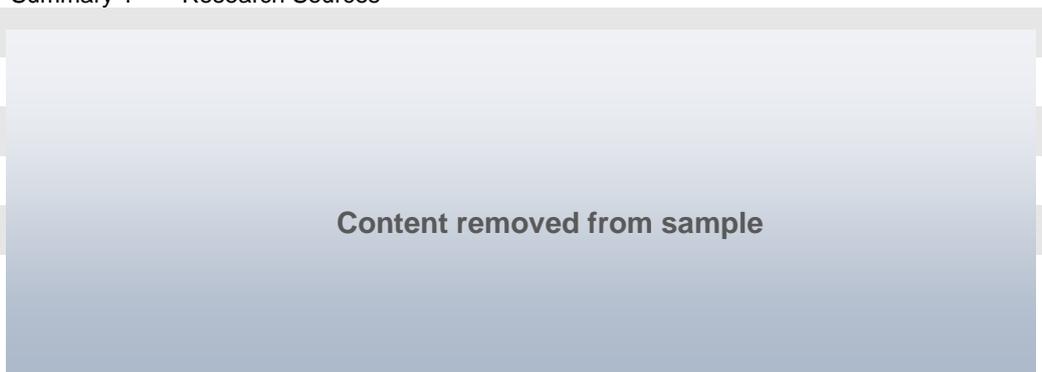
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SOURCES

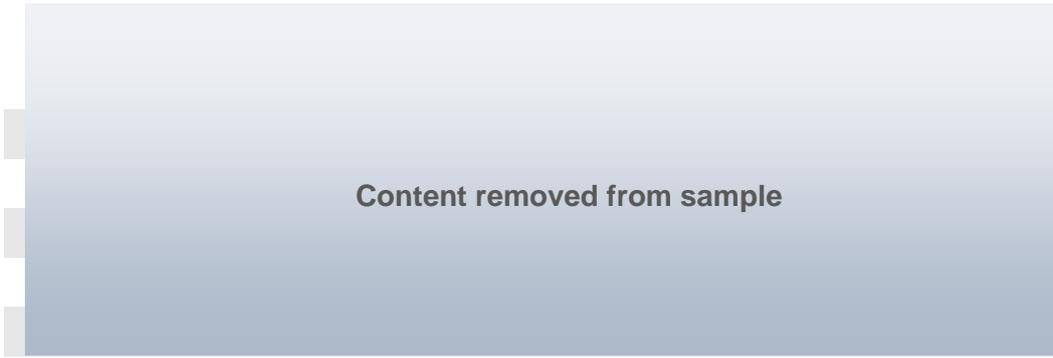
Sources used during the research included the following:

Summary 1 Research Sources



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Source: Euromonitor International