

Soft Drinks in New Zealand

Market Direction | 2024-11-14 | 91 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €2150.00
- Multiple User License (1 Site) €4300.00
- Multiple User License (Global) €6450.00

Report description:

Over the course of 2022-2023, inflation rates in New Zealand surged past 7%, as the country dealt with supply chain disruptions, infrastructure challenges, and the aftereffects of the Reserve Bank of New Zealand's (RBNZ) decision to reduce the Official Cash Rate (OCR) to record lows during the COVID-19 pandemic. This decision, combined with the government's fiscal stimulus measures - including wage subsidies - exacerbated the pressure on inflation. In response, the RBNZ raised the OCR from 0.25%...

Euromonitor International's Soft Drinks in New Zealand report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2019-2023), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution, packaging or pricing issues. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Asian Speciality Drinks, Bottled Water, Carbonates, Concentrates, Energy Drinks, Juice, RTD Coffee, RTD Tea, Sports Drinks.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Soft Drinks market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

Soft Drinks in New Zealand
Euromonitor International
November 2024

List Of Contents And Tables

SOFT DRINKS IN NEW ZEALAND

EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024

Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024

Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024

Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024

Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024

Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024

Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024

Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024

Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024

Table 10 ☐Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024

Table 11 ☐Off-trade Sales of Soft Drinks by Category: Value 2019-2024

Table 12 ☐Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024

Table 13 ☐Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024

Table 14 ☐Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024

Table 15 ☐NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024

Table 16 ☐LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024

Table 17 ☐NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024

Table 18 ☐LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024

Table 19 ☐NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 20 ☐LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 21 ☐NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 22 ☐LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 23 ☐Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 24 ☐Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 25 ☐Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 26 ☐Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 27 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 28 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 29 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 30 ☐Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 31 ☐Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 32 □Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 33 □Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 34 □Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 35 □Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Table 36 □Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

APPENDIX

Fountain sales in New Zealand

DISCLAIMER

SOURCES

Summary 1 Research Sources

CARBONATES IN NEW ZEALAND

KEY DATA FINDINGS

2024 DEVELOPMENTS

Lack of domestic CO2 supply impacting carbonates

Pepsi brand refresh

Cost of living pressures driving shift from foodservice to off-trade

PROSPECTS AND OPPORTUNITIES

On-trade expected to rebound as economy recovers

Off-shore CO2 dependency to place pressure on supplier margins and unit price growth

Health and wellness preferences to drive continued shift towards sugar-free products

CATEGORY DATA

Table 37 Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024

Table 38 Off-trade vs On-trade Sales of Carbonates: Value 2019-2024

Table 39 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024

Table 40 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024

Table 41 Off-trade Sales of Carbonates by Category: Volume 2019-2024

Table 42 Off-trade Sales of Carbonates by Category: Value 2019-2024

Table 43 Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024

Table 44 Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024

Table 45 Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024

Table 46 □Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024

Table 47 □NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024

Table 48 □LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024

Table 49 □NBO Company Shares of Off-trade Carbonates: % Value 2020-2024

Table 50 □LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024

Table 51 □Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029

Table 52 □Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 53 □Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 54 □Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 55 □Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029

Table 56 □Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

JUICE IN NEW ZEALAND

KEY DATA FINDINGS

2024 DEVELOPMENTS

Juice producers feeling the squeeze

Health and wellness remains a priority, despite cost of living pressures

Cost of living pressures driving shift from foodservice to off-trade

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

PROSPECTS AND OPPORTUNITIES

Uncertainty over orange supply hangs over local juice industry

Rise of sober-curious trend to impact juice demand

On-trade expected to rebound as economy recovers

CATEGORY DATA

Table 57 Off-trade Sales of Juice by Category: Volume 2019-2024

Table 58 Off-trade Sales of Juice by Category: Value 2019-2024

Table 59 Off-trade Sales of Juice by Category: % Volume Growth 2019-2024

Table 60 Off-trade Sales of Juice by Category: % Value Growth 2019-2024

Table 61 NBO Company Shares of Off-trade Juice: % Volume 2020-2024

Table 62 LBN Brand Shares of Off-trade Juice: % Volume 2021-2024

Table 63 NBO Company Shares of Off-trade Juice: % Value 2020-2024

Table 64 LBN Brand Shares of Off-trade Juice: % Value 2021-2024

Table 65 Forecast Off-trade Sales of Juice by Category: Volume 2024-2029

Table 66 □Forecast Off-trade Sales of Juice by Category: Value 2024-2029

Table 67 □Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029

Table 68 □Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

BOTTLED WATER IN NEW ZEALAND

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflationary pressures ease, unit price growth slows but still elevated

Cost-of-living pressures drive shift from foodservice to off-trade

Sustainability and cost-of-living concerns lead to lower off-trade demand

PROSPECTS AND OPPORTUNITIES

Further easing of inflationary pressures and slower value sales growth

Sustainability considerations likely to increase as economy recovers

Rise of sugar-free and sober-curious trends presents opportunities

CATEGORY DATA

Table 69 Off-trade Sales of Bottled Water by Category: Volume 2019-2024

Table 70 Off-trade Sales of Bottled Water by Category: Value 2019-2024

Table 71 Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024

Table 72 Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024

Table 73 NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024

Table 74 LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024

Table 75 NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024

Table 76 LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024

Table 77 Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029

Table 78 □Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029

Table 79 □Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029

Table 80 □Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

SPORTS DRINKS IN NEW ZEALAND

KEY DATA FINDINGS

2024 DEVELOPMENTS

Unit price growth slows amid cost-of-living pressures

PRIME Hydration secures local distributor

Sport sponsorship remains a key marketing tool

PROSPECTS AND OPPORTUNITIES

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Opportunities to target female and millennial consumers
Easing inflationary pressures expected to slow value sales growth
Opportunities for local players focused on sugar-free options

CATEGORY DATA

Table 81 Off-trade Sales of Sports Drinks: Volume 2019-2024
Table 82 Off-trade Sales of Sports Drinks: Value 2019-2024
Table 83 Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024
Table 84 Off-trade Sales of Sports Drinks: % Value Growth 2019-2024
Table 85 NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024
Table 86 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024
Table 87 NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024
Table 88 LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024
Table 89 Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029
Table 90 □Forecast Off-trade Sales of Sports Drinks: Value 2024-2029
Table 91 □Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029
Table 92 □Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

ENERGY DRINKS IN NEW ZEALAND

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflationary pressures ease, but unit price growth remains elevated

PRIME Energy secures local distributor

Cost-of-living pressures drive shift from foodservice to off-trade

PROSPECTS AND OPPORTUNITIES

Opportunities to target female and millennial consumers
Easing inflationary pressures expected to slow value sales growth
Opportunities for local players focused on sugar-free options

CATEGORY DATA

Table 93 Off-trade Sales of Energy Drinks: Volume 2019-2024
Table 94 Off-trade Sales of Energy Drinks: Value 2019-2024
Table 95 Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024
Table 96 Off-trade Sales of Energy Drinks: % Value Growth 2019-2024
Table 97 NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024
Table 98 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024
Table 99 NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024
Table 100 LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024
Table 101 Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029
Table 102 □Forecast Off-trade Sales of Energy Drinks: Value 2024-2029
Table 103 □Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029
Table 104 □Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

CONCENTRATES IN NEW ZEALAND

KEY DATA FINDINGS

2024 DEVELOPMENTS

Lack of dynamism impacts powdered concentrates

Downtrading to private label in response to cost-of-living pressures

Barkers of Geraldine expand into non-traditional adjacencies

PROSPECTS AND OPPORTUNITIES

Health and wellness trends expected to gain traction with economic recovery

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Digital engagement as a key growth driver for local brands

Economic recovery presents opportunities for local craft and artisanal brands

CATEGORY DATA

Concentrates Conversions

Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 105 Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024

Table 106 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024

Table 107 Off-trade Sales of Concentrates by Category: Value 2019-2024

Table 108 Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024

Table 109 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024

Table 110 NBO Company Shares of Off-trade Concentrates: % Value 2020-2024

Table 111 LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024

Table 112 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024

Table 113 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024

Table 114 □NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024

Table 115 □LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024

Table 116 □Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029

Table 117 □Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029

Table 118 □Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029

Table 119 □Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

RTD TEA IN NEW ZEALAND

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cost-of-living pressures cause consumer belt-tightening

Dilmah enters RTD tea

Cost-of-living pressures drive shift from foodservice to off-trade

PROSPECTS AND OPPORTUNITIES

Economic recovery expected to drive renewed health and wellness focus

RTD tea set to grow at the expense of traditional tea

Increased competition likely to benefit budget-conscious consumers

CATEGORY DATA

Table 120 Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 121 Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 122 Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 123 Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 124 Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024

Table 125 NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 126 LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 127 NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 128 LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 129 □Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 130 □Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 131 □Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 132 □Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

RTD COFFEE IN NEW ZEALAND

KEY DATA FINDINGS

2024 DEVELOPMENTS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Unit price growth slows as category becomes more mainstream

Nestle enters RTD coffee

Millennials drive RTD coffee consumption

PROSPECTS AND OPPORTUNITIES

Increased cannibalisation from coffee expected as RTD coffee becomes more mainstream

Sustainability and origin to appeal to consumers

Slowing value sales growth amid improving economic conditions

CATEGORY DATA

Table 133 Off-trade Sales of RTD Coffee: Volume 2019-2024

Table 134 Off-trade Sales of RTD Coffee: Value 2019-2024

Table 135 Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024

Table 136 Off-trade Sales of RTD Coffee: % Value Growth 2019-2024

Table 137 NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024

Table 138 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024

Table 139 NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024

Table 140 LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024

Table 141 Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029

Table 142 □Forecast Off-trade Sales of RTD Coffee: Value 2024-2029

Table 143 □Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029

Table 144 □Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

ASIAN SPECIALITY DRINKS IN NEW ZEALAND

KEY DATA FINDINGS

2024 DEVELOPMENTS

Asian speciality drinks sees growth from mainstream channels

Strong Asian migration helps to restore growth in the category

PROSPECTS AND OPPORTUNITIES

Cultural events and festivals offer opportunities to increase customer base

Growing health consciousness likely to support consumption

CATEGORY DATA

Table 145 Off-trade Sales of Asian Speciality Drinks: Volume 2019-2024

Table 146 Off-trade Sales of Asian Speciality Drinks: Value 2019-2024

Table 147 Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2019-2024

Table 148 Off-trade Sales of Asian Speciality Drinks: % Value Growth 2019-2024

Table 149 NBO Company Shares of Off-trade Asian Speciality Drinks: % Volume 2020-2024

Table 150 LBN Brand Shares of Off-trade Asian Speciality Drinks: % Volume 2021-2024

Table 151 NBO Company Shares of Off-trade Asian Speciality Drinks: % Value 2020-2024

Table 152 LBN Brand Shares of Off-trade Asian Speciality Drinks: % Value 2021-2024

Table 153 Forecast Off-trade Sales of Asian Speciality Drinks: Volume 2024-2029

Table 154 □Forecast Off-trade Sales of Asian Speciality Drinks: Value 2024-2029

Table 155 □Forecast Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2024-2029

Table 156 □Forecast Off-trade Sales of Asian Speciality Drinks: % Value Growth 2024-2029

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Soft Drinks in New Zealand

Market Direction | 2024-11-14 | 91 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€2150.00
	Multiple User License (1 Site)	€4300.00
	Multiple User License (Global)	€6450.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-11"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com