



Euromonitor
International

Coffee in New Zealand

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Inflation, global supply pressures and home-brewing culture shape category performance

INDUSTRY PERFORMANCE

Retail value sales of coffee increased in 2025, driven primarily by pricing dynamics and selective premium trading-up
Fresh coffee beans lead category dynamism as home-brewing culture deepens and premium quality expectations rise

WHAT'S NEXT?

Coffee expected to record steady value growth supported by premiumisation, home-café routines and diversified format innovation
Cold formats, concentrates and RTDs reshape usage occasions as younger consumers shift toward convenience and portability
Ethical sourcing and sustainability commitments continue to shape brand credibility and premium positioning

COMPETITIVE LANDSCAPE

Nestlé maintains leadership through portfolio breadth, strong household penetration and health-aligned innovation
Coffee Supreme emerges as the most dynamic company as it broadens accessibility and deepens consumer loyalty

CHANNELS

Supermarkets remain the dominant channel as value-seeking shoppers favour consolidated grocery missions and strong promotional cycles
E-commerce continues to expand as digital grocery growth and specialty roaster direct-to-consumer models reshape purchasing behaviour

CATEGORY DATA

- Table 1 - Retail Sales of Coffee by Category: Volume 2020-2025
Table 2 - Retail Sales of Coffee by Category: Value 2020-2025
Table 3 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025
Table 4 - Retail Sales of Coffee by Category: % Value Growth 2020-2025
Table 5 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025
Table 6 - NBO Company Shares of Coffee: % Retail Value 2021-2025
Table 7 - LBN Brand Shares of Coffee: % Retail Value 2022-2025
Table 8 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030
Table 9 - Forecast Retail Sales of Coffee by Category: Value 2025-2030
Table 10 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030
Table 11 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

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EXECUTIVE SUMMARY

Inflationary pressures, shifting household priorities and values-driven purchasing shape market performance in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health and wellness trends reshape category innovation and influence purchasing behaviour
Sustainability commitments strengthen brand credibility and reinforce premium positioning

WHAT'S NEXT?

Hot drinks are set to record modest value growth as inflation eases and consumers refocus on purposeful premiumisation
Wellness shifts from a trend to an embedded expectation across all major categories
Sustainability, traceability and responsible packaging become mandatory components of brand credibility

COMPETITIVE LANDSCAPE

Jacobs Douwe Egberts NZ strengthens category leadership through portfolio breadth, home-brewing relevance and strategic innovation
Coffee remains the most dynamic category as home-brewing habits accelerate premiumisation and innovation

CHANNELS

Supermarkets consolidate their role as the dominant retail channel as households prioritise value, convenience and reliable availability
E-commerce emerges as the fastest-growing channel as digital ecosystems evolve and specialty roasters expand direct-to-consumer reach

FOODSERVICE VS RETAIL SPLIT

Foodservice demand remains subdued as cost pressures persist and consumers shift café habits into the home
Retail channel benefits from home-brewing culture and rising demand for premium and functional formats

MARKET DATA

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
Table 13 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
Table 14 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
Table 15 - Retail Sales of Hot Drinks by Category: Value 2020-2025
Table 16 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 17 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
Table 18 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
Table 19 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 20 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
Table 21 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
Table 22 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
Table 23 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
Table 24 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
Table 25 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
Table 26 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
Table 28 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
Table 29 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
Table 30 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 32 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
Table 34 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 35 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
Table 36 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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