



Soft Drinks in New Zealand

January 2026

Table of Contents

EXECUTIVE SUMMARY

Volume sales see an uptick thanks to stabilising economic factors

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health and wellness trends become the defining structural driver of soft drinks in New Zealand

Flavour innovation remains a critical driver of differentiation in soft drinks

Sustainability trends continue to rise across New Zealand's soft drinks market

WHAT'S NEXT?

An ongoing positive performance driven by an improving economy and health-led trends

Future innovations will be backed by science-led claims

Distribution will become more strategic over the forecast period

COMPETITIVE LANDSCAPE

Coca-Cola Amatil (NZ) Ltd maintains its overall company lead thanks to myriad strengths

Allpress Espresso benefits from translation café-style coffee into a RTD offer

CHANNELS

Supermarkets maintains leading distribution channel place

Warehouse clubs and retail e-commerce continue to grow

Foodservice vs retail split

Fountain sales in New Zealand

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

[Bottled Water in New Zealand](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Bottled water sees a return to low volume growth, reflecting stabilising demand

INDUSTRY PERFORMANCE

Bottled water sales led by sparkling flavour innovations and value-driven hydration

Functional and sparkling flavoured bottled water attract consumer attention, competing with sports drinks and carbonates

WHAT'S NEXT?

Bottled water sales set to rise over the forecast period, with functional and sparkling flavoured options remaining popular

Digital and technology adoption to underpin efficiency, sustainability and on-the-go occasions

Health and wellness trends will drive growth through functional upgrades and everyday hydration

COMPETITIVE LANDSCAPE

Coca-Cola maintains its leadership over NZ Drinks due to strength of its overall portfolio

Aqa Lite continues to benefit from multiple strategies in sparkling flavoured bottled water

CHANNELS

Supermarkets maintains strongest distribution channel lead

E-commerce continues to grow, supported by digitally enabled convenience and forecourt retail

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025
Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025
Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025
Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025
Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025
Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025
Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025
Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030
Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030
Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030
Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

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Carbonates in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Modest volume growth for carbonates, with sales focussed on popular reduced-sugar options backed by promotions

INDUSTRY PERFORMANCE

Players attract attention with innovations in products and formats

Reduced sugar options align with overarching health and wellness trends

WHAT'S NEXT?

Carbonates set for measured volume growth as economic pressures ease

Health and wellness trends will drive innovation and sales

Sustainability set to become a structural driver of competitiveness in New Zealand carbonates

COMPETITIVE LANDSCAPE

Coca-Cola maintains leadership in carbonates through local scale, channel execution, and disciplined innovation

Natural Sugars benefits from the popularity of mixers, with its flagship Alchemy & Tonic brand

CHANNELS

Supermarkets maintains leading distribution channel place

Warehouse clubs continue to grow

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

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Concentrates in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of concentrates slump, reflecting a shift in demand based on health and convenience

INDUSTRY PERFORMANCE

Innovation in liquid concentrates aims to expand adult-led consumption occasions

Liquid concentrates manages to stay in a marginally positive performance

WHAT'S NEXT?

Concentrates expected to return to low positive volume growth, reflecting a widening range of consumption occasions

Health and wellness to structurally reshape concentrates demand, shifting growth toward low-sugar utility and at-home versatility

Sustainability trends to reinforce concentrates' relevance as an efficient, low-waste beverage format

COMPETITIVE LANDSCAPE

Barker Fruit Processors maintains lead through premium scale and capacity investment

Six Barrel Soda Co drives growth via craft-led expansion and operational reset

CHANNELS

Supermarkets anchor concentrates distribution thanks to wide consumer reach

Retail e-commerce continues to grow from a low base, with direct-to-consumer online sales particularly relevant for concentrates

Concentrates Conversions

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

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

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[Juice in New Zealand](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice maintains low positive volume growth, supported by new product developments and health and wellness trends

INDUSTRY PERFORMANCE

Innovations focus on low-sugar, organic, and functional attributes

Juice drinks show the strongest growth, benefitting from lower prices and new product developments

WHAT'S NEXT?

Juice sales expected to gradually decline over the forecast period

Not from concentrate 100% juice offers may become more popular

Opportunities continue for coconut water, due to low category maturity

COMPETITIVE LANDSCAPE

Frucor Suntory maintains its lead thanks to strength of overall portfolio and local production capabilities
Private label benefits from offering healthy juice options at affordable prices

CHANNELS

Supermarkets maintains dominant distribution channel lead for sales of juice
Retail e-commerce continues to grow, reflecting the ongoing rise of digital shopping

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025
Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025
Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025
Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025
Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025
Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025
Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025
Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025
Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030
Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030
Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030
Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

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[RTD Coffee in New Zealand](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

RTD coffee maintains double-digit growth, supported by new product innovation and wider availability

INDUSTRY PERFORMANCE

Volume sales driven by RTD coffee being cheaper than café coffee, with premiumisation supporting value growth
Local innovation polarises around two clear strategies

WHAT'S NEXT?

RTD coffee set for sustained expansion as iced formats embed all-day, on-the-go consumption
RTD coffee competition to intensify as brands sharpen their positioning and defend relevance against adjacent functional drinks
Health-led fortification to drive premium growth in RTD coffee as brands target energy, satiety and functional benefits

COMPETITIVE LANDSCAPE

Suntory Boss maintains robust leadership in RTD coffee, thanks to being the first to launch
Allpress Espresso benefits from leveraging its range as an extension of the café culture

CHANNELS

Supermarkets maintains strong distribution channel lead for RTD coffee
Retail e-commerce continues to develop from a relatively small base

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025
Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025
Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025
Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025
Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025
Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of RTD tea return to flat volume growth, driven by carbonated RTD tea and kombucha

INDUSTRY PERFORMANCE

RTD tea benefits from health and wellness trends, albeit with competition from “better-for-you” categories

Carbonated RTD tea and kombucha meet demand for naturally positioned alternatives to carbonates

WHAT'S NEXT?

RTD teas set for modest growth, driven by carbonated formats while still tea remains niche

Matcha signals the next evolution of RTD tea, shifting growth toward café-led, wellness-driven relevance

RTD tea channel strategies to shift toward omnichannel discovery, premium signalling and digital-led trials

COMPETITIVE LANDSCAPE

Unilever benefits from long-standing presence of Lipton in still RTD tea

Smaller brands act as disruptors in RTD tea developments, supporting overall performance

CHANNELS

Supermarkets remain as the dominant distribution channel for RTD tea, thanks to mainstream visibility

Retail e-commerce continues to grow from a low base

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Energy Drinks in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Energy drinks achieves double-digit volume growth, thanks sustained new product development and category repositioning

INDUSTRY PERFORMANCE

New product launches fragment the category to address different needs

Reduced sugar energy drinks align with overall sugar moderation trend

WHAT'S NEXT?

Energy drinks set for sustained volume growth over the forecast period, supported by lifestyle-led expansion

Health and wellness-led innovation will continue to expand energy drinks' uses

Digital-first convenience to anchor repeat-led growth for energy drinks

COMPETITIVE LANDSCAPE

V maintains lead over Red Bull, while Red Bull engages in strong brand activity, and Coca-Cola benefits from its overall portfolio

The Musashi bus attracts attention with its LED display to showcase the Energy Amplified brand line

CHANNELS

Supermarkets drive energy drinks sales, reinforced by scale, value-led promotions and digital reach

Growth further supported by digitisation strategies and loyalty-linked offers

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025

Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in New Zealand](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports drinks benefit from widening consumption occasions

INDUSTRY PERFORMANCE

Clean-label, recovery-led sports drinks reshape the category beyond performance hydration

Reduced sugar sports drinks align with sugar moderation trends

WHAT'S NEXT?

Sports drinks shifts into a growth-stage lifestyle category, supported by broader penetration and health-led innovation

Digital retail execution strengthens visibility, conversion, and repeat purchasing for sports drinks

Health-led reformulation and cognitive functionality redefine sports drinks beyond performance hydration

COMPETITIVE LANDSCAPE

Coca-Cola maintains robust lead thanks to strong brand trust of Powerade

Small new entrants disrupt sports drinks with new formulations to meet a wider range of needs

CHANNELS

Supermarkets anchor sports drinks distribution, thanks to enabling wide consumer reach
Forecourt retailers benefit from meeting on-the-go hydration needs

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025
Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025
Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025
Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025
Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025
Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025
Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025
Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025
Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030
Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030
Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030
Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

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[Asian Speciality Drinks in New Zealand](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of Asian speciality drinks return to positive growth, as the category continues to grow from an emergent base

INDUSTRY PERFORMANCE

Asian speciality drinks sales led by diaspora demand and Asian grocery expansion
Cultural crossovers and flavour-led trends expand the consumer audience

WHAT'S NEXT?

Asian speciality drinks to post steady, niche-led growth, driven by diaspora demand and flavour crossover rather than mainstream scale
Health-led innovation to drive selective penetration of Asian speciality drinks
Distribution expansion to unlock mainstream trials through Woolworths' international food strategy

COMPETITIVE LANDSCAPE

Asian speciality drinks remains fragmented, with growth driven by specialist retail and emerging brands rather than national leaders
Chinese beverage brands gain increasingly availability via Asian grocery chains

CHANNELS

Local grocery stores drive Asian speciality drinks growth, leading distribution through speed to market, range, and community reach
Supermarkets and e-commerce continue to grow share

CATEGORY DATA

Table 145 - Off-trade Sales of Asian Speciality Drinks: Volume 2020-2025
Table 146 - Off-trade Sales of Asian Speciality Drinks: Value 2020-2025
Table 147 - Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2020-2025
Table 148 - Off-trade Sales of Asian Speciality Drinks: % Value Growth 2020-2025
Table 149 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Volume 2021-2025
Table 150 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Volume 2022-2025
Table 151 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Value 2021-2025
Table 152 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Value 2022-2025
Table 153 - Forecast Off-trade Sales of Asian Speciality Drinks: Volume 2025-2030

Table 154 - Forecast Off-trade Sales of Asian Speciality Drinks: Value 2025-2030

Table 155 - Forecast Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2025-2030

Table 156 - Forecast Off-trade Sales of Asian Speciality Drinks: % Value Growth 2025-2030

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