

Carbonates in New Zealand

January 2026

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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

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Soft Drinks in New Zealand - Industry Overview

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

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