



**Euromonitor
International**

Bottled Water in Australia

November 2025

Table of Contents

[Bottled Water in Australia - Category analysis](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Bottled water benefiting from health and wellness trend

INDUSTRY PERFORMANCE

Bottled water remains an essential component of daily hydration

Strong performance from products with functional benefits

WHAT'S NEXT?

Steady growth forecast for bottled water as category reinforces importance as the go-to hydration beverage

Environmental sustainability key in building goodwill amongst consumers and setting industry standards

Bottled water perfectly poised to be beneficiary of growing demand for functional beverages

COMPETITIVE LANDSCAPE

Mount Franklin benefits from extensive distribution and sustainability credentials

Private label leveraging value-driven strategies to find success in the market

CHANNELS

Supermarkets remains main channel

Retailers start tapping into e-commerce for staple products

CATEGORY DATA

Table 1 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 2 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 3 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 6 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 7 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 8 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 9 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 10 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 11 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 12 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Soft Drinks in Australia - Industry Overview](#)

EXECUTIVE SUMMARY

Consumers looking for products with a healthier profile

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Persistent economic challenges

Functional beverages and health need states drive premium growth

Working to add value

WHAT'S NEXT?

Recovery in consumer spending to support growth

Health and wellness to be a key influence on innovation

Ongoing expansion of e-commerce

COMPETITIVE LANDSCAPE

Coca-Cola Europacific Partners remains the largest player

St Ali seeing strong growth

CHANNELS

Supermarkets plays key role in the shopping habits of Australian consumers

Major retailers and niche brands contribute to e-commerce growth

Foodservice vs retail split

MARKET DATA

Table 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in Australia

Ongoing cost-of-living pressures challenge the foodservice industry

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/bottled-water-in-australia/report.