



Hot Drinks in New Zealand

December 2025

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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

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[Coffee in New Zealand](#)

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

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[Tea in New Zealand](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation, wellness routines and provenance-led purchasing shape tea consumption in a year of elevated but stabilising prices

INDUSTRY PERFORMANCE

Retail value sales of tea increased in 2025 as premium cues, wellness positioning and provenance claims drove engagement despite cost pressures

Black tea reclaims momentum as provenance, authenticity and ethical sourcing strengthen consumer trust

WHAT'S NEXT?

Moderate value growth ahead as premium blends, ethical sourcing and wellness narratives underpin category resilience
Functional, benefit-led blends gain traction as consumers seek targeted health outcomes from everyday beverages
Iced and cold-brew tea expected to reshape consumption occasions as younger audiences embrace refreshing, café-inspired formats

COMPETITIVE LANDSCAPE

Dilmah deepens its market leadership through provenance, purpose-driven branding and strong emotional resonance with New Zealand consumers

CHANNELS

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Other Hot Drinks in New Zealand

KEY DATA FINDINGS

2025 DEVELOPMENTS

Macroeconomic pressure, elevated cocoa costs and shifting wellness trends shape a constrained yet evolving category

INDUSTRY PERFORMANCE

Retail value sales of other hot drinks increased in 2025 as inflation offset volume softness and wellness-oriented formats gained traction
Matcha latte mixes emerge as the most dynamic segment as functional energy and social media influence drive rapid growth

WHAT'S NEXT?

Moderate value growth expected as price stabilisation, wellness diversification and premium lifestyle positioning support category resilience
Holistic wellness and functional positioning will drive the next wave of innovation as indulgent beverages evolve beyond sugar reduction
Plant-based hot drink powders gain momentum as sustainability, carbon awareness and dietary shifts reshape consumer expectations

COMPETITIVE LANDSCAPE

Nestlé maintains category leadership as Milo balances nostalgia, energy and better-for-you reformulation
Morning Made emerges as the most dynamic player through matcha-led innovation and lifestyle-driven brand building

CHANNELS

Supermarkets remain the leading channel as consumers favour in-person discovery and impulse-driven treat purchases
E-commerce is the most dynamic channel as consumers adopt digital grocery shopping and seek personalised, convenient replenishment

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