



Euromonitor
International

Beer in New Zealand

June 2025

Table of Contents

KEY DATA FINDINGS

2024 DEVELOPMENTS

Beer consumption suffers a notable decline amidst the cost-of-living crisis
Lion and DB Breweries continue to dominate while craft brewers feel the pinch
Drop in discretionary spending levels hurts on-trade consumption

PROSPECTS AND OPPORTUNITIES

Flat outlook for beer
Competition to intensify for non alcoholic beer
Replicating the on-trade experience at home as beer players learn lessons from non-alcoholic drinks players

CATEGORY BACKGROUND

Lager price band methodology
Summary 1 - Lager by Price Band 2024

CATEGORY DATA

Table 1 - Sales of Beer by Category: Total Volume 2019-2024
Table 2 - Sales of Beer by Category: Total Value 2019-2024
Table 3 - Sales of Beer by Category: % Total Volume Growth 2019-2024
Table 4 - Sales of Beer by Category: % Total Value Growth 2019-2024
Table 5 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024
Table 6 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024
Table 7 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024
Table 8 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024
Table 9 - Sales of Beer by Craft vs Standard 2019-2024
Table 10 - GBO Company Shares of Beer: % Total Volume 2020-2024
Table 11 - NBO Company Shares of Beer: % Total Volume 2020-2024
Table 12 - LBN Brand Shares of Beer: % Total Volume 2021-2024
Table 13 - Forecast Sales of Beer by Category: Total Volume 2024-2029
Table 14 - Forecast Sales of Beer by Category: Total Value 2024-2029
Table 15 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029
Table 16 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

Alcoholic Drinks in New Zealand - Industry Overview

EXECUTIVE SUMMARY

Alcoholic drinks in 2024: The big picture
2024 key trends
Competitive landscape
Retail developments
On-trade vs off-trade split
What next for alcoholic drinks?

MARKET BACKGROUND

Legislation
Legal purchasing age and legal drinking age
Drink driving
Advertising
Smoking ban
Opening hours
On-trade establishments

TAXATION AND DUTY LEVIES

OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 17 - Retail Consumer Expenditure on Alcoholic Drinks 2019-2024

MARKET DATA

Table 18 - Sales of Alcoholic Drinks by Category: Total Volume 2019-2024

Table 19 - Sales of Alcoholic Drinks by Category: Total Value 2019-2024

Table 20 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024

Table 21 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024

Table 22 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2024

Table 23 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2024

Table 24 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2024

Table 25 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024

Table 26 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024

Table 27 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024

Table 28 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029

Table 29 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029

Table 30 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029

Table 31 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 2 - 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/beer-in-new-zealand/report.