



HW Soft Drinks in Australia

December 2025

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KEY DATA FINDINGS

2024 DEVELOPMENTS

The “sugar revolution” accelerates as functional benefits reshape innovation

INDUSTRY PERFORMANCE

Reformulation and functionalisation widen health and wellness appeal beyond carbonates
No sugar consolidates leadership across carbonates, sports drinks and energy drinks
Natural positioning holds up through clean labels, botanicals and “credible” functionality

WHAT’S NEXT

Sugar reduction and benefit-led hydration will drive health and wellness soft drinks growth
No sugar is expected to sustain strong growth as reformulation becomes the default
Natural is expected to remain steady, strengthened by clean labels and functional botanicals

CATEGORY DATA

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Health and Wellness in Australia - Industry Overview

EXECUTIVE SUMMARY

Health and wellness in Australia pivots towards sugar reduction, functionality and credible everyday benefits

INDUSTRY PERFORMANCE

Sugar reduction and metabolic health concerns shape category-wide performance
Functionality, gut health and protein move health and wellness beyond avoidance

WHAT’S NEXT?

Mainstream integration of functional, lower-sugar and clean-label products will drive future growth

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