



Concentrates in New Zealand

January 2026

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Concentrates in New Zealand - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of concentrates slump, reflecting a shift in demand based on health and convenience

INDUSTRY PERFORMANCE

Innovation in liquid concentrates aims to expand adult-led consumption occasions

Liquid concentrates manages to stay in a marginally positive performance

WHAT'S NEXT?

Concentrates expected to return to low positive volume growth, reflecting a widening range of consumption occasions

Health and wellness to structurally reshape concentrates demand, shifting growth toward low-sugar utility and at-home versatility

Sustainability trends to reinforce concentrates' relevance as an efficient, low-waste beverage format

COMPETITIVE LANDSCAPE

Barker Fruit Processors maintains lead through premium scale and capacity investment

Six Barrel Soda Co drives growth via craft-led expansion and operational reset

CHANNELS

Supermarkets anchor concentrates distribution thanks to wide consumer reach

Retail e-commerce continues to grow from a low base, with direct-to-consumer online sales particularly relevant for concentrates

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Soft Drinks in New Zealand - Industry Overview

EXECUTIVE SUMMARY

Volume sales see an uptick thanks to stabilising economic factors

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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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