



**Euromonitor
International**

Concentrates in Australia

November 2025

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Concentrates in Australia - Category analysis

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2025 DEVELOPMENTS

Concentrates struggling to meet evolving consumer expectations of soft drinks

INDUSTRY PERFORMANCE

Concentrates sees volume decline

Powder concentrates registers a positive performance

WHAT'S NEXT?

Concentrates needs to adapt to changing demand trends

Coffee and other café-style concentrates winning over consumers by replicating the café experience at home

Sustainability to be a key driver of innovation for companies over the forecast period

COMPETITIVE LANDSCAPE

Leading brand expands reduced sugar offer

Nestlé targeting interest in café-style coffee experiences

CHANNELS

Supermarkets remains dominant

Supermarkets leverages its inherent advantages to capture the majority of concentrates sales in Australia

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Soft Drinks in Australia - Industry Overview

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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

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