



Euromonitor
International

Other Hot Drinks in New Zealand

December 2025

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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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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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