



Euromonitor
International

Rtds in New Zealand

August 2026

Table of Contents

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Rtds Summary

INDUSTRY PERFORMANCE

Brands Attract New Consumer Demand with Wellness-Led Launches

Spirit Houses and Brewers Drive Innovation as Portfolios Diversify

Chart 1 - Tui Ventures into Rtds in 2025 with Fruit-Forward, Low-Sugar Options Targeting Health-Conscious Kiwis

Pal's and Curious Af Win over Mindful Drinkers with Nolo Launches

Chart 2 - Volume Sales 2020-2030

Chart 3 - Volume Sales by Category 2025

WHAT'S NEXT?

Pal's Leverages Authenticity and Affordability to Sustain Loyalty

Kirin and Local Producers Drive Cocktail-Inspired Flavour Innovation

Premiumisation and Polarisation Reshape Competitive Strategies

Chart 4 - Forecast Volume Sales 2020-2030

Chart 5 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Pal's Defends Premium Lead as Value Players Edge Forward

Chart 6 - Company Shares 2025

Chart 7 - Brand Shares 2025

CHANNELS

Liquorland and Super Liquor Drive High-Velocity Chilled Rtd Sales

'Chill and Go' and Festival Bundles Capture New Rtd Occasions

Digital Platforms Build Rtd Brand Presence Despite Slow Online Sales

ECONOMIC CONTEXT

Chart 8 - Economic Context for Rtds

Chart 9 - Real Gdp Growth 2020-2030

Chart 10 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 11 - Consumer Context for Rtds

Chart 12 - Population 2020-2030

Chart 13 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 14 - Key Industry Trends for Alcoholic Drinks

INDUSTRY PERFORMANCE

Moderation and At-Home Consumption Curb Volume Sales

Rtds Outperform as Innovation and Convenience Win Consumer Interest

Zeffer 0% and Free Af?Drinks Attract Health-Focused Consumers with No-Alcohol Innovation

Chart 15 - Volume Sales 2020-2030

Chart 16 - Volume Sales by Category 2025

WHAT'S NEXT?

Health-Led and Mindful Product Options Expand as Demand for Moderation Rises

Pal'S and White Claw Sustain Rtds Growth as Beer Volume Declines

Supermarkets and Convenience Stores Gain Share as At-Home Occasions Rise

Chart 17 - Forecast Volume Sales 2020-2030

Chart 18 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Chart 19 - Analyst insight for Alcoholic Drinks

Lion - Beer, Wine & Spirits (Nz)And Db Breweries Lose Ground as Rtd Innovators Accelerate Share

Chart 20 - Company Shares 2025

Chart 21 - Brand Shares 2025

CHANNELS

Licensed Bottle Stores Extend Lead as At-Home Drinking Rises

Liquorland Online and Farro Fresh Drive Online Sales with Curated Ranges

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

PRODUCTS

Coca-Cola Oceania and Zeffer Expand Wellness and Convenience with New Launches

Free Af and Pal's Gain Share by Targeting Mindful Drinkers

ECONOMIC CONTEXT

Chart 22 - Economic Context for Alcoholic Drinks

Chart 23 - Real Gdp Growth 2020-2030

Chart 24 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 25 - Consumer Context for Alcoholic Drinks

Chart 26 - Population 2020-2030

Chart 27 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

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/rtds-in-new-zealand/report.