



Soft Drinks in Australia

January 2024

Table of Contents

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2019-2023

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2020-2023

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2019-2023

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2020-2023

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

APPENDIX

Fountain sales in Australia

Trends

DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Bottled Water in Australia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bottled water continues to see inflationary pressure on input costs

Functional bottled water continues to see dynamic growth

Appetite for variety driving growth for flavoured bottled water

PROSPECTS AND OPPORTUNITIES

Cost-of-living pressures will continue to impact the forecast for bottled water

Bottled water consumption to face long-term challenge of substitution

Sustainable practices will continue to be addressed by players in bottled water

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2018-2023

Table 38 - Off-trade Sales of Bottled Water by Category: Value 2018-2023

Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023

Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023

Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023

Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023

Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023

Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023

Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028

Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028

Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

[Carbonates in Australia](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Reduced sugar variants drive the growth of carbonates

Soaring inflation and input costs impact carbonates

Brands respond to inflationary pressures by changing the price-packaging mix

PROSPECTS AND OPPORTUNITIES

Variety will be the watchword in carbonates

Health and wellness set to drive innovation

Recovery in consumption outside the home likely to be slow due to cost of living pressures

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2018-2023

Table 54 - Off-trade Sales of Carbonates by Category: Value 2018-2023

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

Concentrates in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Concentrates faces long-term volume decline

Health and wellness drives growth for reduced sugar concentrates

Cost-of-living pressures drive some consumers to concentrates

PROSPECTS AND OPPORTUNITIES

Premiumisation is set to slow in concentrates

Health and wellness likely to drive continued move towards sugar-free products

Concentrates faces the challenge of limited growth potential per capita

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 71 - Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

Juice in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Juice brands have to contend with supply chain issues

Cost of living pressures exert downwards pressure on juice consumption

Health and wellness impact juice consumption

PROSPECTS AND OPPORTUNITIES

Premiumisation expected to slow as the cost-of-living crisis hits consumers
Slow recovery of foodservice will impact on-trade sales
Growing health consciousness to offer growth opportunities for functional products

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2018-2023
Table 85 - Off-trade Sales of Juice by Category: Value 2018-2023
Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2018-2023
Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2018-2023
Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2019-2023
Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2020-2023
Table 90 - NBO Company Shares of Off-trade Juice: % Value 2019-2023
Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2020-2023
Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2023-2028
Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2023-2028
Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028
Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

RTD Coffee in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cost-of-living crisis impacts RTD coffee manufacturers
Strong brews and caffeine content driving competition with RTD coffee
Dare continues to lead RTD coffee in Australia

PROSPECTS AND OPPORTUNITIES

Volume growth of RTD coffee to be impacted by inflationary pressures
Sustainability growing in importance for consumers of RTD coffee
Dairy-free alternatives represent a growth opportunity

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2018-2023
Table 97 - Off-trade Sales of RTD Coffee: Value 2018-2023
Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023
Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2018-2023
Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023
Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023
Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023
Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023
Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028
Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2023-2028
Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028
Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

RTD Tea in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

RTD tea sees an impact from rising costs and the cost-of-living crisis
Growth in kombucha continues to slow from historic highs
Lipton continues to lead RTD tea

PROSPECTS AND OPPORTUNITIES

Health trend expected to continue to drive off-trade growth for reduced sugar still RTD tea
Slower growth set to continue for carbonated RTD tea and kombucha
RTD tea still offers growth opportunities, driven by flavours and healthy innovations

CATEGORY DATA

- Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2018-2023
- Table 109 - Off-trade Sales of RTD Tea by Category: Value 2018-2023
- Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023
- Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023
- Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2018-2023
- Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023
- Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023
- Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023
- Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023
- Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028
- Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028
- Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028
- Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

Energy Drinks in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation drives dynamic value growth for energy drinks, despite slower volume growth
Reduced sugar innovation grows the energy drinks consumer base
Concerns around social commerce as Prime Energy finds itself banned in Australia

PROSPECTS AND OPPORTUNITIES

Flavour innovation will be a key driver of growth for energy drinks
All-natural energy drinks will drive innovation in the category
Growing influence of social commerce and celebrity marketing in energy drinks

CATEGORY DATA

- Table 121 - Off-trade Sales of Energy Drinks: Volume 2018-2023
- Table 122 - Off-trade Sales of Energy Drinks: Value 2018-2023
- Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023
- Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2018-2023
- Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023
- Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023
- Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023
- Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023
- Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028
- Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2023-2028
- Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028
- Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

Sports Drinks in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Spending pressures temper the growth of sports drinks

Rise of functional soft drinks increases the competition for sports drinks
Powerade and Gatorade continue to dominate sports drinks in Australia

PROSPECTS AND OPPORTUNITIES

Sports drinks are perceived as sugary, resulting in lower penetration amongst health-conscious Australians
Reduced sugar sports drinks emerging only slowly despite new product launches
Social media and celebrity marketing emerging as growth drivers for brands

CATEGORY DATA

- Table 133 - Off-trade Sales of Sports Drinks: Volume 2018-2023
- Table 134 - Off-trade Sales of Sports Drinks: Value 2018-2023
- Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023
- Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2018-2023
- Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023
- Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023
- Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023
- Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023
- Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028
- Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2023-2028
- Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028
- Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

Asian Speciality Drinks in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Asian speciality drinks sees growth from mainstream channels
Mogu Mogu continues to lead Asian speciality drinks

PROSPECTS AND OPPORTUNITIES

Cost of living pressures set to slow volume growth
Growing health consciousness likely to support consumption

CATEGORY DATA

- Table 145 - Off-trade Sales of Asian Speciality Drinks: Volume 2018-2023
- Table 146 - Off-trade Sales of Asian Speciality Drinks: Value 2018-2023
- Table 147 - Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2018-2023
- Table 148 - Off-trade Sales of Asian Speciality Drinks: % Value Growth 2018-2023
- Table 149 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Volume 2019-2023
- Table 150 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Volume 2020-2023
- Table 151 - NBO Company Shares of Off-trade Asian Speciality Drinks: % Value 2019-2023
- Table 152 - LBN Brand Shares of Off-trade Asian Speciality Drinks: % Value 2020-2023
- Table 153 - Forecast Off-trade Sales of Asian Speciality Drinks: Volume 2023-2028
- Table 154 - Forecast Off-trade Sales of Asian Speciality Drinks: Value 2023-2028
- Table 155 - Forecast Off-trade Sales of Asian Speciality Drinks: % Volume Growth 2023-2028
- Table 156 - Forecast Off-trade Sales of Asian Speciality Drinks: % Value Growth 2023-2028

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/soft-drinks-in-australia/report.