

Alcoholic Drinks in New Zealand

June 2025

Table of Contents

Alcoholic Drinks in New Zealand

EXECUTIVE SUMMARY

Alcoholic drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retail developments

On-trade vs off-trade split

What next for alcoholic drinks?

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

KEY NEW PRODUCT LAUNCHES

Outlook

MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2019-2024

MARKET DATA

- Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2019-2024
- Table 3 Sales of Alcoholic Drinks by Category: Total Value 2019-2024
- Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024
- Table 5 Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024
- Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2024
- Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2024
- Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2024
- Table 9 GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024
- Table 10 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024
- Table 11 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024
- Table 12 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029
- Table 13 Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029
- Table 14 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029
- Table 15 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Beer in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Beer consumption suffers a notable decline amidst the cost-of-living crisis

Lion and DB Breweries continue to dominate while craft brewers feel the pinch

Drop in discretionary spending levels hurts on-trade consumption

PROSPECTS AND OPPORTUNITIES

Flat outlook for beer

Competition to intensify for non alcoholic beer

Replicating the on-trade experience at home as beer players learn lessons from non-alcoholic drinks players

CATEGORY BACKGROUND

Lager price band methodology

Summary 2 - Lager by Price Band 2024

CATEGORY DATA

Table 16 - Sales of Beer by Category: Total Volume 2019-2024

Table 17 - Sales of Beer by Category: Total Value 2019-2024

Table 18 - Sales of Beer by Category: % Total Volume Growth 2019-2024

Table 19 - Sales of Beer by Category: % Total Value Growth 2019-2024

Table 20 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024

Table 21 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024

Table 22 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 23 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024

Table 24 - Sales of Beer by Craft vs Standard 2019-2024

Table 25 - GBO Company Shares of Beer: % Total Volume 2020-2024

Table 26 - NBO Company Shares of Beer: % Total Volume 2020-2024

Table 27 - LBN Brand Shares of Beer: % Total Volume 2021-2024

Table 28 - Forecast Sales of Beer by Category: Total Volume 2024-2029

Table 29 - Forecast Sales of Beer by Category: Total Value 2024-2029

Table 30 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029

Table 31 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

Cider/Perry in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Changing attitudes towards alcohol drives a decline in cider/perry

DB Breweries continues to evolve to pique the interest of local consumers

Supermarkets is an increasingly popular channel for cider/perry

PROSPECTS AND OPPORTUNITIES

Improving economic conditions to spur a return to total volume growth

Local cider players to take inspiration from wine to create premium points of difference

Focus on alcohol-free offerings is expected

CATEGORY DATA

Table 32 - Sales of Cider/Perry: Total Volume 2019-2024

Table 33 - Sales of Cider/Perry: Total Value 2019-2024

Table 34 - Sales of Cider/Perry: % Total Volume Growth 2019-2024

Table 35 - Sales of Cider/Perry: % Total Value Growth 2019-2024

Table 36 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2019-2024

- Table 37 Sales of Cider/Perry by Off-trade vs On-trade: Value 2019-2024
- Table 38 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 39 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 40 GBO Company Shares of Cider/Perry: % Total Volume 2020-2024
- Table 41 NBO Company Shares of Cider/Perry: % Total Volume 2020-2024
- Table 42 LBN Brand Shares of Cider/Perry: % Total Volume 2021-2024
- Table 43 Forecast Sales of Cider/Perry: Total Volume 2024-2029
- Table 44 Forecast Sales of Cider/Perry: Total Value 2024-2029
- Table 45 Forecast Sales of Cider/Perry: % Total Volume Growth 2024-2029
- Table 46 Forecast Sales of Cider/Perry: % Total Value Growth 2024-2029

Rtds in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

RTDs is not immune from the effects of the economic downturn

White Claw launches to challenge local star Pal's

Regulation limits distribution outside of food/drink/tobacco specialists

PROSPECTS AND OPPORTUNITIES

RTDs is set to rebound but not reach review period highs

Fragmented competitive landscape is primed for consolidation

RTD cocktail kits may add dynamism to the category

CATEGORY DATA

- Table 47 Sales of RTDs by Category: Total Volume 2019-2024
- Table 48 Sales of RTDs by Category: Total Value 2019-2024
- Table 49 Sales of RTDs by Category: % Total Volume Growth 2019-2024
- Table 50 Sales of RTDs by Category: % Total Value Growth 2019-2024
- Table 51 Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024
- Table 52 Sales of RTDs by Off-trade vs On-trade: Value 2019-2024
- Table 53 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 54 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 55 GBO Company Shares of RTDs: % Total Volume 2020-2024
- Table 56 NBO Company Shares of RTDs: % Total Volume 2020-2024
- Table 57 LBN Brand Shares of RTDs: % Total Volume 2021-2024
- Table 58 Forecast Sales of RTDs by Category: Total Volume 2024-2029
- Table 59 Forecast Sales of RTDs by Category: Total Value 2024-2029
- Table 60 Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029
- Table 61 Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

Spirits in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Economic pressures drive down volume sales

Strong players drive spirits

Regulatory constraints see food/drink/tobacco specialists dominate distribution

PROSPECTS AND OPPORTUNITIES

Volume sales are set to rebound, but a full recovery is unlikely in the forecast period Economic recovery offers opportunities for the emerging local whisky offer Incorporating local culture into local products

CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 3 - Benchmark Brands 2024

CATEGORY DATA

- Table 62 Sales of Spirits by Category: Total Volume 2019-2024
- Table 63 Sales of Spirits by Category: Total Value 2019-2024
- Table 64 Sales of Spirits by Category: % Total Volume Growth 2019-2024
- Table 65 Sales of Spirits by Category: % Total Value Growth 2019-2024
- Table 66 Sales of Spirits by Off-trade vs On-trade: Volume 2019-2024
- Table 67 Sales of Spirits by Off-trade vs On-trade: Value 2019-2024
- Table 68 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 69 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 70 Sales of Dark Rum by Price Platform: % Total Volume 2019-2024
- Table 71 Sales of White Rum by Price Platform: % Total Volume 2019-2024
- Table 72 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2019-2024
- Table 73 Sales of English Gin by Price Platform: % Total Volume 2019-2024
- Table 74 Sales of Vodka by Price Platform: % Total Volume 2019-2024
- Table 75 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2019-2024
- Table 76 GBO Company Shares of Spirits: % Total Volume 2020-2024
- Table 77 NBO Company Shares of Spirits: % Total Volume 2020-2024
- Table 78 LBN Brand Shares of Spirits: % Total Volume 2021-2024
- Table 79 Forecast Sales of Spirits by Category: Total Volume 2024-2029
- Table 80 Forecast Sales of Spirits by Category: Total Value 2024-2029
- Table 81 Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029
- Table 82 Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

Wine in New Zealand

KEY DATA FINDINGS

2024 DEVELOPMENTS

Wine sees a downturn amidst cost-of-living and supply pressures and changing consumer preferences Wine is increasingly fragmented and segmented, while the national carrier launches its own wine label Supermarkets remains the leading channel for wine

PROSPECTS AND OPPORTUNITIES

Wine is expected to bounce back, but headwinds remain Sustainability considerations to grow in importance Innovation potential lies in non/low alcohol wine

CATEGORY DATA

- Table 83 Sales of Wine by Category: Total Volume 2019-2024
- Table 84 Sales of Wine by Category: Total Value 2019-2024
- Table 85 Sales of Wine by Category: % Total Volume Growth 2019-2024
- Table 86 Sales of Wine by Category: % Total Value Growth 2019-2024
- Table 87 Sales of Wine by Off-trade vs On-trade: Volume 2019-2024
- Table 88 Sales of Wine by Off-trade vs On-trade: Value 2019-2024
- Table 89 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 90 Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 91 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 92 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2019-2024

- Table 93 Sales of Still White Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 94 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 95 GBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024
- Table 96 NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024
- Table 97 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024
- Table 98 GBO Company Shares of Champagne: % Total Volume 2020-2024
- Table 99 NBO Company Shares of Champagne: % Total Volume 2020-2024
- Table 100 LBN Brand Shares of Champagne: % Total Volume 2021-2024
- Table 101 GBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024
- Table 102 NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024
- Table 103 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024
- Table 104 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024
- Table 105 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024
- Table 106 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024
- Table 107 GBO Company Shares of Non-grape Wine: % Total Volume 2020-2024
- Table 108 NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024
- Table 109 LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024
- Table 110 Forecast Sales of Wine by Category: Total Volume 2024-2029
- Table 111 Forecast Sales of Wine by Category: Total Value 2024-2029
- Table 112 Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029
- Table 113 Forecast Sales of Wine by Category: % Total Value Growth 2024-2029

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 focusing 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/alcoholic-drinks-in-new-zealand/report.