



Euromonitor
International

Concentrates in Australia

November 2024

Table of Contents

KEY DATA FINDINGS

2024 DEVELOPMENTS

Ongoing DIY beverage trend fuels demand for concentrates
Australia's health-conscious beverage boom fuels innovation in concentrates
Brewing convenience and customisation drive growth in coffee concentrates

PROSPECTS AND OPPORTUNITIES

Concentrates must navigate at-home boom and on-the-go pressures
Wellness and sustainability to propel growth of concentrates
E-commerce and social media will remain essential to drive consumer engagement

CATEGORY DATA

Concentrates Conversions

Summary 1 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 1 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024

Table 2 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024

Table 3 - Off-trade Sales of Concentrates by Category: Value 2019-2024

Table 4 - Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024

Table 5 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024

Table 6 - NBO Company Shares of Off-trade Concentrates: % Value 2020-2024

Table 7 - LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024

Table 8 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024

Table 9 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024

Table 10 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024

Table 11 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024

Table 12 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029

Table 13 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029

Table 14 - Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029

Table 15 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

Soft Drinks in Australia - Industry Overview

EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture
2024 key trends
Competitive landscape
Retailing developments
Foodservice vs retail split
What next for soft drinks?

MARKET DATA

Table 16 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024

Table 18 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024

Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024

Table 20 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024

Table 22 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024

Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024

Table 24 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024

Table 25 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024

Table 26 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024

Table 27 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024

Table 28 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024

Table 29 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024

Table 30 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024

Table 31 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024

Table 32 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024

Table 33 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024

Table 34 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 35 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 36 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 37 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 38 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 39 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 40 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 41 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 45 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 46 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Table 47 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 48 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 49 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 50 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Table 51 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

APPENDIX

Fountain sales in Australia

Ongoing cost-of-living pressures challenge the foodservice industry

DISCLAIMER

SOURCES

Summary 2 - Research Sources

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/concentrates-in-australia/report.