

# RTD Coffee in Australia

January 2024

Table of Contents

## RTD Coffee in Australia - Category analysis

### 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 1 - Off-trade Sales of RTD Coffee: Volume 2018-2023  
Table 2 - Off-trade Sales of RTD Coffee: Value 2018-2023  
Table 3 - Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023  
Table 4 - Off-trade Sales of RTD Coffee: % Value Growth 2018-2023  
Table 5 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023  
Table 6 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023  
Table 7 - NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023  
Table 8 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023  
Table 9 - Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028  
Table 10 - Forecast Off-trade Sales of RTD Coffee: Value 2023-2028  
Table 11 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028  
Table 12 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

## Soft Drinks in Australia - Industry Overview

### 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 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023  
Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023  
Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023  
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023  
Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023  
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023  
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023  
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023  
Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023  
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023  
Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023  
Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023  
Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023  
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023  
Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2019-2023

Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2020-2023

Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2019-2023

Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2020-2023

Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 48 - 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

## 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/rtd-coffee-in-australia/report](http://www.euromonitor.com/rtd-coffee-in-australia/report).