



# RTD Tea in the Netherlands

November 2025

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## RTD Tea in the Netherlands - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Health exerts a strong influence on category development

#### INDUSTRY PERFORMANCE

Decline of carbonated products a constraint on overall category performance

Still takes share from carbonated, but kombucha continues to attract health-conscious consumers

#### WHAT'S NEXT?

RTD tea enters new phase in its development, kombucha can expand distribution

Reduced sugar options will outperform regular variants, but growth will be slower

Natural image of RTD tea could limit potential for functional innovation

#### COMPETITIVE LANDSCAPE

Consumers buy in bulk during promotions or switch to private label

Upfront aligning with prevailing demand trends

#### CHANNELS

Supermarkets remains dominant, but other channels gain ground

Retail e-commerce increases share

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## Soft Drinks in the Netherlands - Industry Overview

### EXECUTIVE SUMMARY

Soft drinks seeing an upturn

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Weather conditions boost demand, but price rises constrain growth

Shift towards healthier products and marketing tie-ins

#### WHAT'S NEXT?

Manufacturers need to focus on value

Health and wellness to remain key

Red Bull challenging Coca-Cola for top spot

## COMPETITIVE LANDSCAPE

Coca-Cola holds presence across soft drinks

Smaller local companies benefit from clean, modern design and transparency

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