



Euromonitor
International

Soft Drinks in the United Kingdom

November 2025

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EXECUTIVE SUMMARY

Sales of soft drinks rise in 2025 with the focus on health and affordability

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Ongoing price pressures push players to innovate to maintain demand
Health, wellness and sustainability prominent drivers of new product development
Guilt-free indulgence a key trend in 2025

WHAT'S NEXT?

New product development and innovation likely to remain key growth drivers
Players set to lean on digital technology in a rapidly evolving market
New and forthcoming regulation set to impact company strategies within soft drinks

COMPETITIVE LANDSCAPE

Coca-Cola retains a strong lead in soft drinks thanks to its broad brand portfolio
Monster Energy thriving while smaller players gain prominence in niche areas of the market

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Need for healthy and affordable hydration fuels strong demand for bottled water

INDUSTRY PERFORMANCE

Health concerns around tap water boost sales of bottled water in 2025

Flavoured and functional bottled water products benefit from focus on healthy indulgence

WHAT'S NEXT?

Health and sustainability set to remain a key focus of growth and innovation in bottled water

Diversified distribution and convenience trends support category expansion

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COMPETITIVE LANDSCAPE

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Powder concentrates sees polarised demand

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Digital transformation and product innovation

Regulatory shifts and sustainability focus

COMPETITIVE LANDSCAPE

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WHAT'S NEXT?

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Digital engagement driving brand visibility and sales

Tighter regulations on sugar content, labelling and marketing on the horizon

COMPETITIVE LANDSCAPE

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[RTD Coffee in the United Kingdom](#)

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INDUSTRY PERFORMANCE

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Promotions help push volume sales

WHAT'S NEXT?

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Social media and e-commerce set the pace for innovation
RTD coffee is evolving through a focus on health, functionality, and sustainability

COMPETITIVE LANDSCAPE

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RTD Tea in the United Kingdom

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INDUSTRY PERFORMANCE

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Digitalisation and social media turn matcha and bubble tea from online trends to retail powerhouses

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2025 PERFORMANCE

Energy drinks continue to flourish despite economic pressures

INDUSTRY PERFORMANCE

Healthier choices and flavour innovation drive growth in energy drinks

Limited edition products help drive interest and excitement in energy drinks

WHAT'S NEXT?

Wider adoption of energy claims within soft drinks will increase competition for the category

Efficient use of data and technology could provide players with an edge

Regulatory and legislative developments present a challenge to the market

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Intense competition, rapid innovation, and the growing influence of challenger brands

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[Sports Drinks in the United Kingdom](#)

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INDUSTRY PERFORMANCE

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