



RTD Tea in Italy

December 2025

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RTD Tea in Italy - Category analysis

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2025 DEVELOPMENTS

RTD tea faces headwinds due to competition and health trends

INDUSTRY PERFORMANCE

Competition and health concerns drive decline for RTD tea

Growth in reduced sugar RTD tea tempered by concerns about artificial sweeteners

WHAT'S NEXT?

Value growth expected despite volume decline as manufacturer re-engage

Lipton Ice Tea's "Tea Changes Everything" campaign in the Italian market

Kombucha poised for growth in the health-conscious Italian market

COMPETITIVE LANDSCAPE

San Benedetto continues to lead RTD tea while Ferrero prioritises volume over value

Santhè leads growth in RTD tea with a dynamic clean-label strategy

CHANNELS

Supermarkets retains its distribution lead, yet suffers from actual sales decline

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Soft Drinks in Italy - Industry Overview

EXECUTIVE SUMMARY

Soft drinks sees modest growth amidst health trends, channel shifts, and price rises

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Mixed fortunes, with health trends and competition reshaping soft drinks

Demand for reduced sugar products surges despite sugar tax postponement

Functionality and wellness drive innovation in soft drinks, reshaping the dynamics

WHAT NEXT?

Energy drinks and functional bottled water to drive modest growth

Italian sugar tax set to reshape soft drinks, driving a shift to reduced sugar options

Functionality and premiumisation set to dominate soft drinks trends

COMPETITIVE LANDSCAPE

San Benedetto leads in volume terms, while Coca-Cola leads value sales

waterdrop revitalises powder concentrates with dynamic innovation and health focus

CHANNELS

Supermarkets retains its lead in soft drinks through promotions and product range

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