



RTD Tea in Canada

November 2025

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RTD Tea in Canada - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health positioning and premium innovation support a levelling RTD tea market

INDUSTRY PERFORMANCE

RTD tea growth slows as inflation and category maturity weigh on demand

Growth pockets in carbonated RTD tea, kombucha and reduced sugar formats

WHAT'S NEXT?

Moderate growth outlook driven by health trends but constrained by demographics and competition

Functional benefits and cross-category innovation gain prominence

Sugar reduction, sweeteners and labelling changes shape future dynamics

COMPETITIVE LANDSCAPE

Nestea transition reshapes leadership while Fuze enters the market

Smaller brands and kombucha specialists diversify the competitive set

CHANNELS

Brick-and-mortar remains the primary sales channel for RTD tea

E-commerce and omni-channel models continue to gain importance

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Soft Drinks in Canada - Industry Overview

EXECUTIVE SUMMARY

Soft drinks adjust to shifting health priorities, economic caution and changing consumption behaviour

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health and wellness expectations reshape category dynamics

Premiumisation and affordable indulgence gain relevance in a cautious economic climate

Customisation and home beverage making expand, challenging ready-to-drink formats

WHAT'S NEXT?

Soft drinks forecast to maintain modest value growth amid constrained volume gains

Health priorities and functional positioning to intensify across categories
Regulatory shifts and ingredient pressures to influence product strategy

COMPETITIVE LANDSCAPE

Category leaders diversify portfolios while adjusting to shifting distribution agreements
Agile challengers and specialised players gain traction through innovation

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