



Euromonitor
International

Bottled Water in China

November 2025

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Bottled Water in China - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strong progress for the bottled water category

INDUSTRY PERFORMANCE

Bottled water consumption occasions are on the rise

Product launches drive category growth

Wider distribution strategies drives sales of carbonated natural mineral bottled water

WHAT'S NEXT?

Bright outlook with diverse products aimed at different segments

Advancements in packaging will enhance sustainable credentials

Technology offers scope to enhance transparency, traceability and enhance production efficiencies

COMPETITIVE LANDSCAPE

Wahaha builds on its resurgence in 2025

Nongfu Spring Co Ltd solidifies its leading position

CHANNELS

Accessibility and convenience pushes most sales through small local stores

Vending growth reflects rising demand for instant access

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EXECUTIVE SUMMARY

Relatively bright performance for soft drinks

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INDUSTRY PERFORMANCE

Health factors bear heavy influence on soft drinks

Consumers are willing to pay for convenience and instant delivery

Local cultural traditions increasingly shape product developments

WHAT'S NEXT?

Stable outlook for soft drinks

Players will capitalise on more discerning tastes
High growth of reduced-sugar RTD tea will continue

COMPETITIVE LANDSCAPE

Nongfu Spring Co Ltd strengthens position with growth in RTD tea
Domestic companies gain traction in highly competitive landscape

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