



RTD Tea in the US

December 2025

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RTD Tea in the US - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Regular still RTD tea pulls down overall category performance

INDUSTRY PERFORMANCE

Reduced sugar still RTD tea continues to gain momentum and has yet to reach its full potential

Kombucha offers growth opportunities amidst the wellness trend

WHAT'S NEXT?

Onus on healthier options to develop RTD tea

AI to play a dynamic role

US-Argentina relations cool commodity concerns

COMPETITIVE LANDSCAPE

New course for Lipton offers growth opportunities

Milo's enjoys investment to climb the rankings

CHANNELS

Impulse and away-from-home consumption occasions favour convenience retailers in RTD tea

Online and omnichannel competition to convenience retailers intensifies

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Soft Drinks in the US - Industry Overview

EXECUTIVE SUMMARY

Premiumisation and caution visible in soft drinks in the US

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INDUSTRY PERFORMANCE

Functional beverages witness rapid transformation

Affordability remains a key concern

Slower but significant new product development

WHAT'S NEXT?

Value sales to outpace volume sales in growth terms amid a focus on wellness trends

Players to invest in innovation and marketing to gain a competitive edge

Climatic imprint on soft drinks

COMPETITIVE LANDSCAPE

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Poppi surges after PepsiCo acquisition

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