



Euromonitor
International

RTD Coffee in China

November 2025

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RTD Coffee in China - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growing appeal of RTD coffee

INDUSTRY PERFORMANCE

Healthier lines attract consumers

Rapid rise in coffee culture supports consumer interest

WHAT'S NEXT?

Sophisticated products will deliver healthier offerings

Technologies will enhance flavours, quality and traceability

Players to roll out sustainable packaging solutions

COMPETITIVE LANDSCAPE

Nestlé (China) Ltd retains lead through regular new flavour extensions and formats

Starbucks harnesses local culture to ensure relevancy

CHANNELS

Small local grocers offer key benefits to RTD coffee brands

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EXECUTIVE SUMMARY

Relatively bright performance for soft drinks

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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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