



Euromonitor
International

RTD Tea in China

November 2025

Table of Contents

RTD Tea in China - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising consumer interest in RTD tea

INDUSTRY PERFORMANCE

Healthy performance as RTD teas gain visibility in stores

Reduced-sugar RTD tea is sweet spot for consumers

WHAT'S NEXT?

Bright outlook for RTD tea

Flavour diversification will bolster appeal

Functional traits give rise to new variants of RTD tea

COMPETITIVE LANDSCAPE

Master Kong Ice Tea maintains a strong lead

Oriental Leaf pushes into second position with zero sugar variant

CHANNELS

Modern channel is key for RTD tea

Snack discount retailers show remarkable growth

CATEGORY DATA

Table 1 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 2 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 3 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 5 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 6 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 7 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 8 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 9 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 10 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 11 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 12 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 13 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Soft Drinks in China - Industry Overview

EXECUTIVE SUMMARY

Relatively bright performance for soft drinks

KEY DATA FINDINGS

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

CHANNELS

Soft drinks is heavily reliant on the traditional channel
Rising expectations over convenience and immediacy
Foodservice vs retail split

MARKET DATA

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 15 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 17 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 19 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 21 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 23 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 24 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 25 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 27 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 28 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025
Table 29 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025
Table 30 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025
Table 31 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025
Table 32 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 33 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 34 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 35 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 36 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 37 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 39 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 45 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 47 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 49 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in China

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/rtd-tea-in-china/report.