



Concentrates in China

November 2025

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Concentrates in China - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

China's rising coffee culture has positive impact on concentrates

INDUSTRY PERFORMANCE

Coffee concentrates draw on China's rapid growth of coffee consumption

Desire for healthier beverages supports liquid concentrates

Consumers are attracted by the portability of liquid concentrates

WHAT'S NEXT?

Bright outlook for concentrates

Players will embrace health attributes to bolster appeal

Sustainability will remain high on the agenda

COMPETITIVE LANDSCAPE

Luckin Coffee (Beijing) Co Ltd reinforces its lead

Dynamic performance of Luckin Coffee linked to multiple factors

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Soft Drinks in China - Industry Overview

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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

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