



Euromonitor  
International

# RTD Tea in the United Kingdom

November 2025

Table of Contents

## RTD Tea in the United Kingdom - Category analysis

### KEY DATA FINDINGS

#### 2025 PERFORMANCE

Another strong year for sales of RTD tea

#### INDUSTRY PERFORMANCE

RTD tea successfully meets the demand for healthy and convenient refreshment

Carbonated RTD tea and kombucha offers a healthy alternative to alcohol and sugary drinks

#### WHAT'S NEXT?

RTD tea set to benefit from ongoing investment in innovation

Digitalisation and social media turn matcha and bubble tea from online trends to retail powerhouses

Targeted wellness and the rise of need states in functional RTD tea

#### COMPETITIVE LANDSCAPE

Lipton continues to lead while innovation and new entrants reshape the RTD Tea market

Market becoming more fragmented as smaller players and private label vie for share

#### CHANNELS

Supermarkets and convenience stores playing a key role in sales of RTD tea

E-commerce continues to present new sales and marketing opportunities

#### 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 the United Kingdom - Industry Overview

### EXECUTIVE SUMMARY

Sales of soft drinks rise in 2025 with the focus on health and affordability

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Ongoing price pressures push players to innovate to maintain demand

Health, wellness and sustainability prominent drivers of new product development

Guilt-free indulgence a key trend in 2025

#### WHAT'S NEXT?

New product development and innovation likely to remain key growth drivers

Players set to lean on digital technology in a rapidly evolving market

New and forthcoming regulation set to impact company strategies within soft drinks

## COMPETITIVE LANDSCAPE

Coca-Cola retains a strong lead in soft drinks thanks to its broad brand portfolio

Monster Energy thriving while smaller players gain prominence in niche areas of the market

## CHANNELS

Affordability remains a key issue as supermarkets and hypermarkets dominate sales

Foodservice playing a key role in driving retail growth and innovation

## 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 the United Kingdom

## COUNTRY REPORTS DISCLAIMER

## 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-the-united-kingdom/report](http://www.euromonitor.com/rtd-tea-in-the-united-kingdom/report).