



# RTD Tea in Canada

November 2025

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## RTD Tea in Canada - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Health positioning and premium innovation support a levelling RTD tea market

#### INDUSTRY PERFORMANCE

RTD tea growth slows as inflation and category maturity weigh on demand

Growth pockets in carbonated RTD tea, kombucha and reduced sugar formats

#### WHAT'S NEXT?

Moderate growth outlook driven by health trends but constrained by demographics and competition

Functional benefits and cross-category innovation gain prominence

Sugar reduction, sweeteners and labelling changes shape future dynamics

#### COMPETITIVE LANDSCAPE

Nestea transition reshapes leadership while Fuze enters the market

Smaller brands and kombucha specialists diversify the competitive set

#### CHANNELS

Brick-and-mortar remains the primary sales channel for RTD tea

E-commerce and omni-channel models continue to gain importance

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## Soft Drinks in Canada - Industry Overview

### EXECUTIVE SUMMARY

Soft drinks adjust to shifting health priorities, economic caution and changing consumption behaviour

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Health and wellness expectations reshape category dynamics

Premiumisation and affordable indulgence gain relevance in a cautious economic climate

Customisation and home beverage making expand, challenging ready-to-drink formats

#### WHAT'S NEXT?

Soft drinks forecast to maintain modest value growth amid constrained volume gains

Health priorities and functional positioning to intensify across categories  
Regulatory shifts and ingredient pressures to influence product strategy

## COMPETITIVE LANDSCAPE

Category leaders diversify portfolios while adjusting to shifting distribution agreements  
Agile challengers and specialised players gain traction through innovation

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