



# RTD Tea in the US

January 2025

Table of Contents

KEY DATA FINDINGS

2024 DEVELOPMENTS

Reduced sugar RTD tea gains momentum amongst health-conscious consumers  
Kombucha regains volume growth thanks to innovation and flavour expansion  
Major players struggle to find growth, while new ones bring fresh air to the category

PROSPECTS AND OPPORTUNITIES

Brands will focus on low sugar formulations and functional ingredients, yet they must address perceptions of sustainability to succeed  
Brand extensions and hybrid products could bring growth to RTD tea  
The rising caffeine levels in energy drinks and RTD coffee create a competitive challenge for RTD tea, but also opportunities

CATEGORY DATA

- Table 1 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024
- Table 2 - Off-trade Sales of RTD Tea by Category: Value 2019-2024
- Table 3 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024
- Table 4 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024
- Table 5 - Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024
- Table 6 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024
- Table 7 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024
- Table 8 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024
- Table 9 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024
- Table 10 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029
- Table 11 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029
- Table 12 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029
- Table 13 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

Soft Drinks in the US - Industry Overview

EXECUTIVE SUMMARY

Soft drinks in 2024: The big picture  
2024 key trends  
Competitive landscape  
Retailing developments  
Foodservice vs retail split  
What next for soft drinks?

MARKET DATA

- Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2019-2024
- Table 15 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024
- Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024
- Table 17 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024
- Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024
- Table 19 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024
- Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024
- Table 21 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024
- Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024
- Table 23 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024
- Table 24 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024
- Table 25 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024
- Table 26 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024
- Table 27 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024

Table 28 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024

Table 29 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024

Table 30 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024

Table 31 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024

Table 32 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024

Table 33 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024

Table 34 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024

Table 35 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024

Table 36 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024

Table 37 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024

Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024

Table 39 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024

Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029

Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029

Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029

Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029

Table 45 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029

Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029

Table 47 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029

Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029

Table 49 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

## APPENDIX

Fountain sales in the US

Growth continues, but sales fail to return to the pre-pandemic level

Innovation in fountain sales aims to personalise experiences

Major foodservice operator to start phasing out fountain sales

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