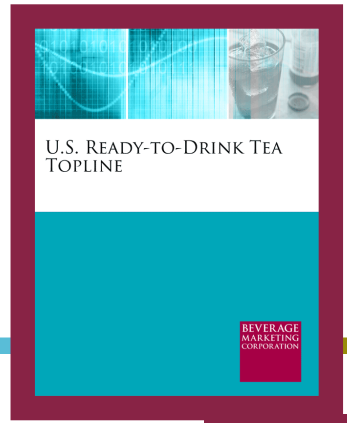
U.S. Ready-to-Drink Tea Topline

2021 Edition (Published December 2021. Data through 2020. Market projections through 2025.) More than 25 pages, with text analysis, graphs and charts.



The *U.S. Ready-to-Drink Tea Topline* report from Beverage Marketing Corporation provides a data overview of the ready-to-drink tea category with key data and five-year forecasts. Perfect for investors, entrepreneurs requiring statistics for their business plan, ad agencies preparing an account pitch or anyone who needs a birds-eye view of the ready-to-drink tea sector. Also includes an executive summary of key trends including discussion of the impact of the coronavirus pandemic.

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INSIDE:

HAVE QUESTIONS?

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The answers you need

U.S. Ready-to-Drink Tea Topline offers a data overview of the overall market. Questions answered include:

- How is tea volume divided among RTD tea, tea bags, tea mixes/powders, tea capsules and loose tea? How have these segments performed in the first half of 2021?
- How has the RTD tea market fared in terms of volume and wholesale dollar sales? What are the projections to 2025?
- Which are the leading RTD tea brands in terms of advertising expenditures?
- What are the imports of black versus green tea into the United States?

This report features

This topline report contains key information and identifies important trends concerning the U.S. RTD tea market. It features category volume, wholesale dollar sales and per capita consumption data, overall tea market volume and five-year projections.



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December 2021

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NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

Table of Contents

Contents

TABLE OF CONTENTS

Summary

One of the main dividing lines in the RTD tea industry was between hot-fill, premium teas and popular, cold-fill teas.

- The hot-fill teas enjoyed a perception of better taste and premium positioning while cold-fill teas enjoyed a price advantage and widespread availability. While cold-fill entries took over the lead in the 1990s, hot-fill brands regained the lead in the early 2000s.

- However, to this day, hot-fill products create expense and complexity that make them an uneasy fit with the established systems of the major soft drink marketers and their bottlers.

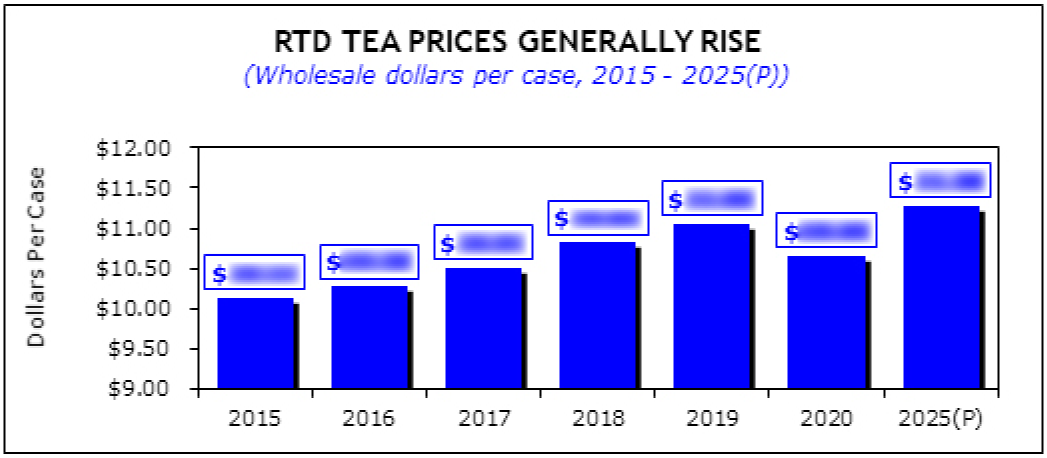
- By now, however, the big beverage companies are building in a substantial amount of their own hot-fill capacity and learning to adapt to the complexities of offering all-natural products as a greater part of their mix. Coca-Cola's ongoing refranchising of its bottling operations in North America reversed course from a requirement that the company retain control of all manufacturing, with a view of garnering greater economies on the hot-fill side, in favor of allowing the more-agile bottlers to continue to manage these operations.

- The distinction between glass and plastic started to wane when RTD tea marketers such as Snapple and AriZona and Coca-Cola began to use plastic packages for their hot-fill products. Plastic has several advantages — i.e., portability and unbreakability — vis-à-vis glass. That is not to say that glass was abandoned. However, Snapple recently introduced a new 16-ounce plastic bottle that has replaced its iconic 16-ounce glass bottle.

- AriZona had a healthy business in glass although a majority of its volume had migrated to plastic and other materials. What's more, it has lessened greatly its reliance on glass after the introduction of a hot-fill plastic bottle created by Plastipak.

- Also, distinguishing what is premium and what is not is becoming more difficult. For example, AriZona was once classified as premium, but is now considered part of the regular RTD tea segment since many of its products — such as the gallon size — sport a relatively low unit price.

- Much of the recent backlash against plastic has not seeped into other beverage categories besides bottled water. The rationale appears to be, rightly or wrongly, that bottled water is not a "necessary" product. So it appears there won't be an exodus in RTD tea from plastic to cans anytime soon.



(P) Projected
Source: Beverage Marketing Corporation

Exhibit 2

U.S. TEA MARKET

SHARE OF CONSUMPTION BY SEGMENT
2015 – 2025(P)

Segment	2015	2016	2017	2018	2019	2020	2021(p)	2025(P)
RTD Tea	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Tea Bags	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Iced Tea Mix	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Loose Tea	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Tea Pods	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
TOTAL	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%

(p) Preliminary; (P) Projected

Note: Does not include institutional tea sales.

Source: Beverage Marketing Corporation