Ready-to-Drink Tea and Kombucha in the U.S. through 2027

2023 Edition (Published December 2023. Data through 2022. Market projections through 2027.) More than 250 pages, with extensive text analysis, graphs, charts and more than 90 tables.

This comprehensive ready-to-drink tea market report examines the U.S. tea market at a time when ongoing innovation and competition from within the category as well as from outside the sector make this a particularly important time to keep a close eye on the trends in the sector and its evolving sub-segments. This in-depth report focuses on RTD tea market trends (pre-packaged, bottled or canned tea). It provides statistics on regional markets as well as historical and current sales data for the leading companies and brands. Forecasts through 2027 are provided and impact of covid-19 is discussed.

Packaging, distribution, advertising expenditures and demographics are discussed in detail, with data to back up the insights provided. The industry research also covers kombucha, looks at refrigerated (RFG) RTD tea vs. shelf stable trends, tea types and flavors, the organic tea market and much more.

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Inside:

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The answers you need

Ready-to-Drink Tea and Kombucha in the U.S. through 2027 provides in-depth data and market analysis, shedding light on various aspects of the market through reliable data and discussions of what the numbers really mean. Questions answered include:

- What are the latest trends behind RTD tea's performance in the U.S. market? Which brands are outperforming the market? Which are underperforming?
- How many gallons of RTD tea did U.S. residents consume in 2022 and the first half of 2023?
- Which price segment of RTD tea will grow the most to 2027?
- What is the latest news regarding organic tea?
- What are the biggest challenges to growth the RTD tea market faces in the current consumer environment?
- How has RTD tea fared in comparison with the broader New Age beverage category?
- How has the RTD tea packaging mix changed in recent years?
- What are the principal distribution channels for hot and RTD tea?

This ready-to-drink tea research report features

Ready-to-Drink Tea and Kombucha in the U.S. through 2027 offers an in-depth look at the category, companies and brands shaping the RTD tea market and the market drivers impacting current and anticipated growth through 2027.

It provides perspective on the segment and its many facets, providing sales and volume statistics including total-market retail dollar sales, wholesale dollar data and volume data. Through a combination of discussion backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, users get a thorough understanding of all facets of the RTD tea market including:

- An overview of the New Age beverage market, including dollar sales, as well as volume, per capita consumption and dollars for the various tea segments and analysis of U.S. and global tea trends. Quarterly RTD tea market growth data are also provided.
- A look at the RTD tea market by price segment, breaking out five tiers from regular and fountain through superpremium.
- Detailed profiles and analysis of the leading companies and brands, discussions of their marketing activities and distribution strategies as well as company and brand sales volume data. Coverage includes Pepsi-Lipton Tea Partnership, Coca-Cola Company, Keurig Dr Pepper, Ferolito, Vultaggio & Sons, Milo's, Ito En and others.
- A look at wholesale dollar sales and case volumes for leading RTD tea brands including Arizona, Bai, Lipton, Gold Peak, Fuze, Milo’s, Teas' Tea, Peace Tea, Red Diamond, Sweet Leaf, Tazo, Tejava, Turkey Hill, Milo's and more.
- Regional consumption patterns of RTD tea volume, as well as regional breakdowns of wholesale dollar sales and regional per capita consumption.

- A look at hot-fill and cold-fill trends and volume by package type, including plastic, cans, glass and paperboard carton; includes detailed volume by package size of both shelf-stable and chilled RTD teas.

- Data detailing volume by key distribution channels totaling 100% of market volume.

- An overview of the kombucha and organic tea markets.

- A look at kombucha brand data for leading brands including GT's, Health-Ade, KeVita, Brew Dr. Kombucha, Humm Kombucha, Aqua ViTea, Buddha's Brew, Rowdy Mermaid, Kombucha Wonder Drink, Carpe Diem, High Country and Reed's.

- Advertising expenditures of the leading RTD tea and dry tea companies and a look at category spending by media type (including Internet and Spanish-language network advertising).

- Consumer demographic profiles comparing consumers of key RTD tea brands.

- Data on green and black tea imports and exports.

- Five-year projections for the overall tea market as well as RTD tea and its sub-segments.

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BEVERAGE MARKETING CORPORATION

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December 2023

BEVERAGE MARKETING CORPORATION

RESEARCH ● DATA ● CONSULTING

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

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Among other strategics, PepsiCo has fared well enough in the value channel with Lipton, the product of its longstanding partnership with Unilever, but failed to devise a compelling strategy at the high end for the Tazo brand it long offered via its Starbucks collaboration before that collaboration was unwound. For a while, the departure of Tazo didn't matter much, because its premium entry under the Lipton brand, Pure Leaf, came on strong with a glass-bottle superpremium line called the Teahouse Collection that used real-brewed tea, subtle formulations that are less sweet or even unsweetened, and a deft cultivation of gourmet food channels. But that glass-bottle line has subsided, and the company seems to be content to simply mine the mid-tier with the core plastic-bottle Pure Leaf line.

- For his part, then Starbucks CEO Howard Schultz acquired the Teavana chain of shopping-mall tea stores and made it clear that his ambitions for that brand ran to potential RTD offerings. As things worked out, the retail component floundered as suburban shopping malls struggled, and its hundreds of stores were shut down. But the Teavana brand was used as a platform for hot and cold beverages created inside Starbucks stores and then was extended into a RTD collaboration with brewing giant Anheuser-Busch.
- The Teavana RTDs launched in 2017 and proved to be a surprisingly credible offering for a company without much successful experience in no-alcohol beverages, despite using a brand name that had failed as a tea merchant. But the company did not do a good job of seeding the brand up and down the street in its key launch market, New York, and despite line expansion with sparkling and functional extensions it never ignited. It was quietly discontinued.
- There is another major player, albeit one that tends to operate under the radar: Ito En, a Japanese giant that is mainly represented in this country by its Teas' Tea line of unsweetened teas.
- Although its unsweetened green tea offerings have long been considered to lie at the bleeding edge of what American consumers will gravitate to, there are undeniable signs that the drinks are beginning to reach a wider audience, including many of the young consumers who conventional wisdom dictates are most addicted to highly sweetened beverages. Increasingly, the brand is found in conventional grocers all over the country.
- New entries continue to arrive, including even that St. James line from the estranged co-founder of AriZona Iced Tea, one of several that are seeking to inaugurate the Tetra Pak as a packaging format in this sector.

Exhibit 2.25

THE NATIONAL RTD TEA MARKET
CHANGE IN VOLUME BY PRICE SEGMENT
2018 – 2027(P)

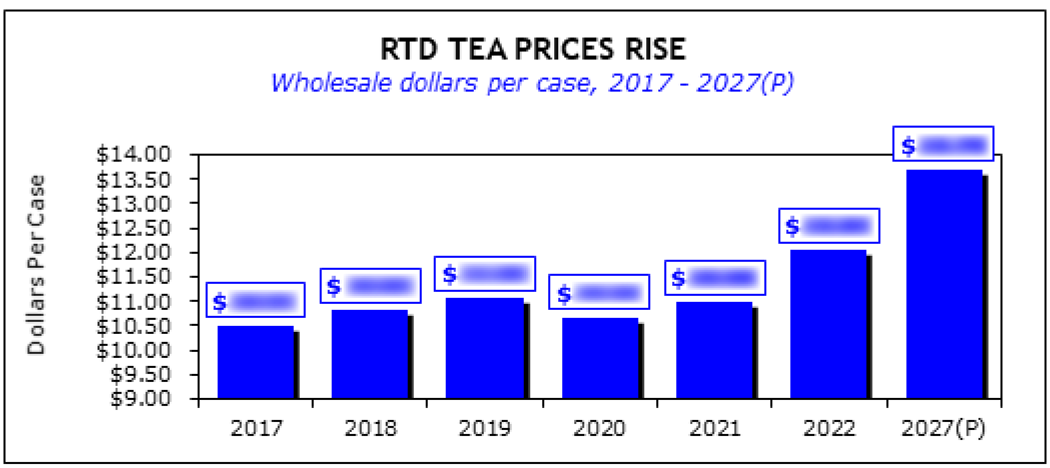
Segment	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23(p)	CAGR 2022/27(P)
Regular	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Popular Priced	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Premium	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Fountain	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Superpremium	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
TOTAL	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(p) Preliminary; (P) Projected

Note: 2022/27 change is five-year compound annual growth rate.

CAGR: Compound annual growth rate.

Source: Beverage Marketing Corporation



(P) Projected
Source: Beverage Marketing Corporation