

A top-down photograph of a wooden surface with two white ceramic bowls. The top bowl is filled with dark, curly tea leaves, and the bottom bowl is filled with dark brown coffee beans. Some tea leaves and coffee beans are scattered on the wooden surface around the bowls. The text '2026 TASTE TRENDS' is overlaid on the left side in a white, bold, sans-serif font, and 'European RTD Coffee & Tea Market' is overlaid below it in a smaller, white, sans-serif font.

2026 TASTE TRENDS

European RTD
Coffee & Tea Market

IN THIS REPORT

In this report, created with support from Innova, we take a look at key trends in the ready-to-drink coffee and tea category across Western and Eastern Europe.

Covering the last 3 years, we highlight emerging ingredient trends and product claims, giving a clear picture of what's shaping the 2026 market and what consumers are looking for.



2026 TRENDS

Coffee and tea RTDs now offer more than a caffeine fix, they provide functionality, clean-label formulations, and formats that support busy, health-conscious lifestyles.

uk.synergytaste.com



TOP FLAVOURS

Drinkers of RTD coffee/tea are seeking comfort in familiarity and often stick to familiar flavours. Despite this, there is an increasing appetite for fruit and indulgent flavours as people balance health-based choices versus treat and reward.



EXPERT CALL OUT

Familiar flavours like vanilla, peach and caramel are being reimagined with botanicals, spices and vibrant fruits that align with health and wellness trends. Flavour must carry the benefit, not compete with it.

 **SYNERGY**[®]

62%

CAGR growth for Iced Coffee with a low/no/reduced fat claim on pack

12%

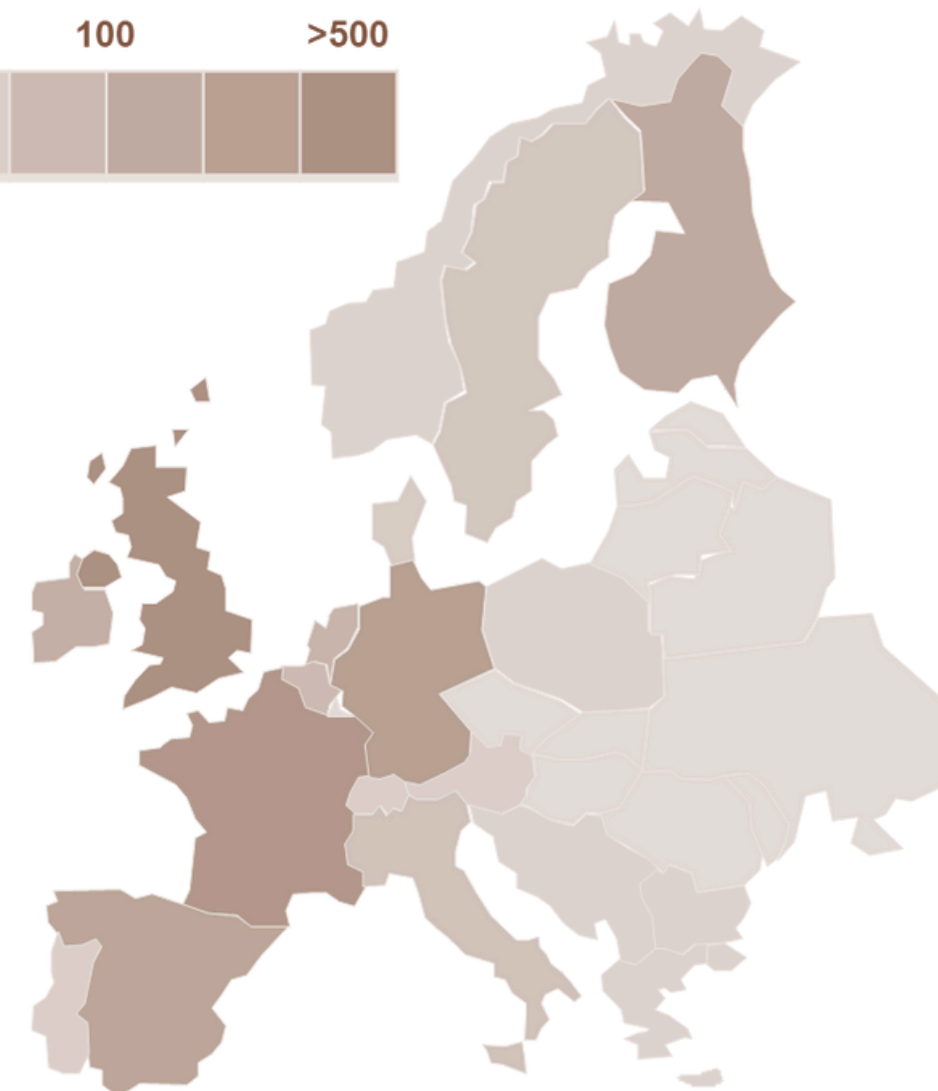
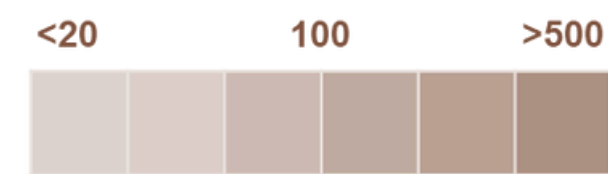
of Iced Tea launches in Europe are from Germany and is the lead market

1 in 2

Europeans cite that taste/flavour most influence them when buying iced tea

16%

of Iced Coffee launches in Europe are from the UK and is the lead market



NPD Summary



Protein in the spotlight

Launches of Iced Coffee with protein is up +131%. Starbucks have launched a range with 20 grams of protein in a 330ml serving. Meanwhile Jimmy's Coffee have launched a range with MyProtein with 21 grams.



Clean Label

Health-conscious consumers are increasingly drawn to clean label claims like natural, organic, and no additives/preservatives, as they offer transparency and align with the growing demand for healthier options.



Indulgent & Premium

Indulgent & Premium claims have seen a rise in both Tea and Coffee, with such claims up 35% and 58% respectively for NPD launches over the last 3 years. This reflects consumer desire for products that offer small indulgences and rewards.

Cranberry
Green Apple
Yuzu
Almond
Red Berry
Pear
Cinnamon
Elderberry
White Chocolate
Pistachio

INTRODUCTION

Growth in product launches over the last year is high or the flavour is highly mentioned on social media

Red Apple
Orange
Pomegranate
Watermelon
Pineapple
Salted Caramel
Milk Chocolate
Hazelnut

GROWTH

Appearance in product launches has been growing over the last year

Raspberry
Caramel
Passion Fruit
Strawberry
Pineapple
Lime

MATURE

Appearance in product launches has been growing over the last 4 years

Peach
Lemon
Ginger
Mint
Mango
Vanilla

PROVEN FAVOURITES

Appeared within top 15 NPD over the last 5 years

TRENDING FLAVOURS

Current flavour trends in ready-to-drink tea and coffee show a continued preference for familiar classics, with steady growth in indulgent and fruity profiles, and an emerging interest in novel, adventurous flavours.

“As health & wellness trends influence beverage choices, matcha is emerging in RTDs for its distinctive flavour profile, natural energy, antioxidants, and calming benefits. Its vibrant colour and cultural appeal resonate with younger consumers seeking mindful, functional drinks.”

TOM CLEGHORN
EUROPEAN BEVERAGE CATEGORY MANAGER

KEY STATS

12%

Growth in European launches of NPD involving matcha

1 in 3

Europeans say they are interested in natural ingredients in beverages

ONE TO WATCH



Currently estimated to be a \$4.3 billion industry, matcha is forecast to grow to \$9 billion by 2031

FLAVOUR SPOTLIGHT



MATCHA

Matcha is a powdered green tea used as both an ingredient and flavour, prized for its earthy, slightly bitter profile, vibrant green colour, and natural association with energy and wellness.

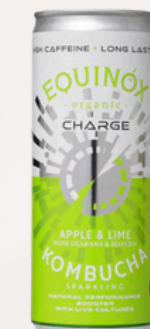
LATEST NPD



Vit Hit **Matcha** Tea Mango & Passionfruit, Portugal



Hakuma Sunshine Lemon Ice **Matcha** Tea, Austria



Equinox Charge Kombucha Apple Lime **Matcha**, United Kingdom

SOCIAL MEDIA COFFEE TRENDS



The trends in numbers

Mushroom Coffee is googled **165 thousand** times a month in the UK

Onion Latte has had **20 million** views on TikTok

Influencer Emma chamberlain's Coffee Company is estimated to have earnt **20 million** last year



Coffee with a savoury shot

Across food and drink consumers are experimenting with flavour combinations such as “swicy and salty”.

The coffee market is no different with unusual additions to a regular cup of joe like miso, scallions, and salt trending on social media. This trend balances savoury ingredients with traditional rich coffee notes, offering a new twist on the classic experience.



Functional benefits in a cuppa

Functional coffee with ingredients like turmeric, ginger, adaptogens, and collagen, that advocate more than just a caffeine buzz are trending, with creators highlighting how functional coffee turns a daily ritual into a mindful, health-focused experience. As consumer focus shifts towards more health and wellness conscious choices, functional coffee is continuing to grow



Blending of multiple syrups

Personalizing coffee with syrups and showcasing “coffee orders” which are unique blends of popular flavours; caramel, vanilla, and seasonal choices like pumpkin spice has trended this year. With over half of consumers opting for flavoured syrups, rising to three quarters when aged 18-34, experimenting with different syrups to make each cup their own is a trend not looking to go away



AUTHOR:

TOM CLEGHORN

EUROPEAN CATEGORY DEVELOPMENT
MANAGER - BEVERAGE MARKET

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