



**Euromonitor
International**

Hot Drinks in the United Kingdom

November 2025

Table of Contents

EXECUTIVE SUMMARY

Rising prices and economic pressures continue to limit growth in hot drinks

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Volume sales stagnate as consumers continue to battle with cost-of-living pressures

Players focus on offering quality products to sustain demand

Consumers look for indulgence without a higher price tag

WHAT'S NEXT?

Expansion of the UK's HFSS regulations set to push healthier options

The digital market opening up opportunities for hot drinks

Producers under mounting pressure to adopt more ethical practices

COMPETITIVE LANDSCAPE

Nestlé retains the lead through constant innovation and new product development

Keurig and JDE Peets merger expected to shake up the coffee market

CHANNELS

Hypermarkets and supermarkets continue to dominate sales in 2025

Foodservice demand shaping the retail market

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Coffee in the United Kingdom](#)

KEY DATA FINDINGS

2025 PERFORMANCE

Coffee market focusing on added-value products as demand stalls

INDUSTRY PERFORMANCE

Focus shifts to value over volume growth in coffee

The search for healthy indulgence informing the growth and development of coffee

WHAT'S NEXT?

Coffee market set to focus on resilience, sustainability, and innovation

The future of coffee: automation, AI, and bean-less innovation

Functionality and flavour innovation will remain key for growth

COMPETITIVE LANDSCAPE

Nestlé continues to lead with ongoing investment in its portfolio

Innovation playing a key role in driving competition in coffee

CHANNELS

Supermarkets and hypermarkets remain dominant but e-commerce is thriving

On-trade sales remain buoyant despite rising prices

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Tea in the United Kingdom](#)

KEY DATA FINDINGS

2025 PERFORMANCE

Sales favour healthier and more indulgent tea offerings

INDUSTRY PERFORMANCE

The wellness wave is reshaping the UK tea market

Innovation rife in tea as players look to expand consumption occasions

WHAT'S NEXT?

Guilt-free indulgence and holistic wellness trends will reshape the tea market

Digital trends and personalisation helping to attract Gen Z to tea
Affordable sustainability set to drive growth in the UK tea market

COMPETITIVE LANDSCAPE

Yorkshire Tea retains the lead with ongoing investment in innovation
Premiumisation and cold tea a focus on market innovation

CHANNELS

Supermarkets and hypermarkets dominate sales while e-commerce makes inroads
Digital trends driving on-trade tea sales

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025
Table 38 - Retail Sales of Tea by Category: Value 2020-2025
Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025
Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025
Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025
Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025
Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030
Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030
Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030
Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Other Hot Drinks in the United Kingdom](#)

KEY DATA FINDINGS

2025 PERFORMANCE

A tough year for other hot drinks with rising prices weighing on demand

INDUSTRY PERFORMANCE

Other hot drinks battling with rising prices and growing health concerns
Nostalgia and healthier options a focus of innovation

WHAT'S NEXT?

Non-traditional formats could revitalise the traditional market for hot chocolate
Personalisation and digital engagement offer growth opportunities
HFSS restrictions to accelerate health and wellness trends in other hot drinks

COMPETITIVE LANDSCAPE

Mondelez leads a market that is rife with innovation
Knoops looking to expand

CHANNELS

Little change in the distribution landscape as consumers look for the best value
The on-trade channel continues to see steady gains

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025
Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025
Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025
Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025
Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/hot-drinks-in-the-united-kingdom/report.