



Euromonitor
International

Hot Drinks in China

November 2025

Table of Contents

EXECUTIVE SUMMARY

Although value sales see a marginal decline, upgrading is seen in some categories

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Premiumisation particularly evident in coffee and other hot drinks

Fruit/herbal tea meets consumers' needs on many levels

Rising costs impact customers and companies

Brands try to strike a balance between affordability and sustainability

WHAT'S NEXT?

Value growth anticipated, but challenges will remain

International players likely to reshape their product portfolios

The integration of online and offline channels will be important

COMPETITIVE LANDSCAPE

Yunnan Taetea (Dayi) Tea Industry Group maintains its lead in a fragmented industry

Local brands perform well, while international brands are adapting

CHANNELS

Retail e-commerce is dynamic and becomes the leading distribution channel

Smaller local retailers remain popular but are challenged by more modern channels

Synergies between retail and foodservice channels

Transformation of hot drinks in foodservice

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

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SOURCES

Summary 1 - Research Sources

[Coffee in China](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumer upgrading contributes to retail value growth

INDUSTRY PERFORMANCE

Premiumisation trend and rising prices drive value growth but volume decline

Fresh coffee sees dynamism as consumer knowledge and coffee machine ownership rise

WHAT'S NEXT?

Multiple factors will contribute to growth, including a wider consumer base

Digital and technological advances are making their impact felt in coffee

Sustainability set to become an even more important factor in coffee

COMPETITIVE LANDSCAPE

Despite a falling value share, Nestlé's wide portfolio and long history maintain its lead in coffee

Yunnan Four Cats Coffee Co takes advantage of localisation, new launches, and social media

CHANNELS

Retail e-commerce leads distribution, due to its convenience, and product and service offering

Retail e-commerce is also the most dynamic distribution channel

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

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[Tea in China](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Fruit/herbal tea maintains retail value growth, despite decline for tea overall

INDUSTRY PERFORMANCE

Although volume and value sales decline, growth is seen for some product types

Demand for healthy beverages and flavour innovation drive solid growth for fruit/herbal tea

WHAT'S NEXT?

A return to growth as incomes rise, knowledge rises, and products diversify
Technology will be used for traceability, consumer engagement, and production efficiency
Health and sustainability will be important in tea

COMPETITIVE LANDSCAPE

Long history and wide distribution help Yunnan Taetea Tea Industry Group maintain its lead
A focus on Mengku large-leaf Pu'er tea drives strong growth for Shuangjiang Mengku Tea Co

CHANNELS

Professional advice, wide portfolios, and culture maintain the lead of tea specialist stores
Retail e-commerce sees exceptional growth due to marketing, live-streams and service improvements

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

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[Other Hot Drinks in China](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Volume growth, premiumisation, and innovation contribute to retail value growth

INDUSTRY PERFORMANCE

Premiumisation and product development contribute to value growth, although volume sales also rise
Other plant-based hot drinks overwhelmingly dominates, as these products are seen as “pure”

WHAT'S NEXT?

Continued growth for other hot drinks as consumers see such products as “food as medicine”
Technology likely to increasingly impact other hot drinks
Adapting to changing health and wellness and sustainability demands will be crucial

COMPETITIVE LANDSCAPE

Despite high fragmentation, VV Group maintains its lead thanks to strong brand equity
Nestlé succeeds by focusing on health and premiumisation

CHANNELS

Small local grocers still valued for impulse purchases and replenishment
Convenience and a wide product range maintain growth for retail e-commerce

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

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