



Euromonitor
International

Hot Drinks in Italy

November 2025

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EXECUTIVE SUMMARY

Hot drinks continues to experience price challenges but premiumisation is evident

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INDUSTRY PERFORMANCE

Mixed performance for hot drinks but perceived healthier options attract consumers

Innovation focuses on sustainability in coffee

Rising preference for bean and pod formats impacts standard fresh ground coffee

Strong emphasis on wellness and functionality within tea

WHAT'S NEXT?

Convenience and health trends to drive future demand for hot drinks

Further innovation in sustainable packaging and sophisticated drinks solutions

At-home consumption of hot drinks set to further decline

COMPETITIVE LANDSCAPE

Major coffee players retain overall lead of competitive landscape

Yogi Tea leverages health trends to record further dynamic growth

CHANNELS

Supermarkets remains leading distribution channel, offering competitive private label

E-commerce and vending most dynamic channels from low base

Foodservice vs retail split

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INDUSTRY PERFORMANCE

Pricing influences consumers' purchasing decisions

Strong performance by fresh ground coffee pods driven by convenience and innovation

WHAT'S NEXT?

Italians to increasingly seek sophistication and convenience in their coffee of choice

Vending offers growth potential as alternative channel outside of the home

Sustainability set to influence innovative packaging solutions

COMPETITIVE LANDSCAPE

Luigi Lavazza SpA retains lead of consolidated competitive landscape

Smaller players show dynamism, while L'Aromatica focuses on its pod formats

L'Or Espresso focuses on influencer marketing for more personable approach

CHANNELS

Grocery retailers dominate distribution, with private label making gains

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[Tea in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and wellness drives tea's positive performance in Italy

INDUSTRY PERFORMANCE

Rising prices and healthy perception drive tea's value sales

Green tea continues to rebound in 2025

Fruit/herbal tea remains dynamic performer, driven by health and wellness positioning

WHAT'S NEXT?

Fruit/herbal tea set to continue driving category sales forward

Vending offers expansion for tea producers in different packaging formats

Wellness and functionality to remain crucial growth drivers for tea

COMPETITIVE LANDSCAPE

Twinings remains leading brand in fairly fragmented competitive landscape

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[Other Hot Drinks in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Other hot drinks continues to struggle with unhealthy image

INDUSTRY PERFORMANCE

Flat value sales and declining demand for other hot drinks in Italy

Barley options support malt-based hot drinks

WHAT'S NEXT?

Further challenges ahead for other hot drinks in Italy

Barley capsules offer growth potential as convenient format

Imminent sugar tax likely to place further pressure on chocolate-based options

COMPETITIVE LANDSCAPE

Nestlé Italiana retains overall dominance with Nesquik

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