



Other Hot Drinks in China

November 2025

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Other Hot Drinks in China - Category analysis

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

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Hot Drinks in China - Industry Overview

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
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