



Tea in China

November 2025

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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

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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

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

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