



Hot Drinks in China

November 2025

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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

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SOURCES

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[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

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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
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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

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