



Top Five Trends in Hot Drinks

December 2025

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INTRODUCTION

Our expert's view of Hot Drinks in 2026

Key findings

Hot drinks at a premium with pricing up and volumes under pressure

Top five trends in Hot Drinks

Top five trends uncovered

BREWING PRICES: HOW COFFEE PRICES ARE CHANGING THE MARKET

Rising commodity costs lead to consequences on retailer shelves

Coffee now lives with high prices and fragile supply

Going the premium route to justify higher prices to the consumer

With prices high, premiumisation is the way for growth for companies

SOCIAL MEDIA PLATFORMS DRIVE DISCOVERY AND INFLUENCE GEN Z PREFERENCES

Gen Z is reshaping the coffee and tea industry through active usage of social media

Identifying top flavours through social media is key to win Gen Z consumers

Starbucks launches Coco Matcha and Coco Cold Brew to appeal to Gen Z consumers

HEYTEA partners with fitness influencer to engage Gen Z consumers

Influence in every sip: Social media as the key to Gen Z engagement

FUNCTIONALITY BEATS SUSTAINABILITY

Consumers do want functional, concrete value for themselves and their families

Whole bean with benefits: Function without new ritual

Broad demands, singular focus: The consumer

Tea can further leverage its healthy positioning

Attracting consumers works by communicating clear, convincing value for them

IN HOME: THE NEW SOCIAL HUB FOR HOT DRINKS

Rediscovering home as a place for wellness and connection

New rise of home café and tea house culture

Starbucks Caramel Latte: Instant café treats for the living room

When the home becomes the café: Growth in the new social hub

CHINESE COFFEE AND TEA SHOPS EXPAND BEYOND THEIR DOMESTIC TURF

Chinese coffee and tea shops enter into new markets such as Southeast Asia and US

Luckin enters the US, positioning itself as a global brand

Chagee positions itself as a premium tea brand blending culture with modern lifestyle

Blending global ambition and hyper-local relevance is key for long-term growth

CONCLUSION

Future implications

Opportunities for growth

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