



Tea in China

November 2025

Table of Contents

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

CATEGORY DATA

Table 1 - Retail Sales of Tea by Category: Volume 2020-2025

Table 2 - Retail Sales of Tea by Category: Value 2020-2025

Table 3 - Retail Sales of Tea by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Tea by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Tea: % Retail Value 2021-2025

Table 6 - LBN Brand Shares of Tea: % Retail Value 2022-2025

Table 7 - Forecast Retail Sales of Tea by Category: Volume 2025-2030

Table 8 - Forecast Retail Sales of Tea by Category: Value 2025-2030

Table 9 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030

Table 10 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

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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

Synergies between retail and foodservice channels

Transformation of hot drinks in foodservice

MARKET DATA

Table 11 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 13 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 14 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 15 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 16 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 17 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 18 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 19 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 20 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 21 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 22 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 23 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 24 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 25 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 26 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 28 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 29 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 30 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 32 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 34 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 35 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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