Euromonitor International

Tea in the US

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Tea in the US - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and wellness trend drives retail value and volume growth for tea

INDUSTRY PERFORMANCE

Growth continues, with consumers opting for the convenience of tea bags in black tea
Green tea sees dynamism thanks to demand for matcha among younger consumers

WHAT'S NEXT?

Value growth expected to continue as consumers seek functional teas
Use of technology expected across the supply chain
Uncertainty about import prices of tea moving forward

COMPETITIVE LANDSCAPE

A greater focus on health by the leading player
Yogi Tea's broad portfolio of organic and herbal offerings drives dynamic growth

CHANNELS

Retail e-commerce leads as consumers look for value and convenience
Tea's light weight and shelf stability ensure continued growth for retail e-commerce

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Hot Drinks in the US - Industry Overview

EXECUTIVE SUMMARY

Retail value sales maintain their rising trend, although volume sales decline

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Competition from outside of hot drinks and rising prices hamper volume growth
Premium functional tea and coffee still see growth opportunities
Increasing interest in health helps maintain the popularity of hot drinks
Climate crises and tariffs impact the prices of imported hot drinks

WHAT'S NEXT?

Value growth anticipated, but volume growth potential will be impacted by competition and price rises
Intentional consumption will offer opportunities for products offering benefits
Splitting of hot drinks and soft drinks businesses likely to be seen

COMPETITIVE LANDSCAPE

Keurig extends its lead in hot drinks thanks to its wide portfolio in fresh coffee
The surge in sales of instant coffee benefits the leader in this category, Nescafé

CHANNELS

Retail e-commerce leads across categories
Nespresso is particularly successful with online sales
The foodservice offering is compelling

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