

After Unilever: The Fragmented New World Order of Global Tea

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INTRODUCTION

Scope

Key findings

WHY UNILEVER WANTS OUT OF TEA

Why is Unilever eager to sell most of its tea business?

The market for black tea is not what it used to be

The inability to gain share in the largest markets was especially critical

Herbal teas are the dominant source of growth in developed countries

Unilever has not kept up with the wider shift towards premium

The RTD exception: why Unilever is staying involved

Why Unilever wants to become a regional tea company

THE NEW LANDSCAPE OF TEA

Forces driving fragmentation in the tea market

Map: only Unilever holds more than regional sway in global tea

The break-up of Unilever tea operations will further fragment the market

The move to e-commerce will further erode share of the big players

Why hasn't tea gone the way of the consolidating coffee market?

The future of tea foodservice looks set to remain divorced from retail

RTD will remain largely under the control of soft drinks companies

THE KEY REGIONAL PLAYERS

No one exerts control over the massive Chinese market

ITO EN tries to move globally from a fragmented Japan

Orimi Trade creates an effective block to foreign brands in the CIS

Tapal maintains a wide lead in the growing Pakistani market

Teekanne rides the herbal wave

New Unilever will be a potent regional player

ABF and Ahmad: the last of the global players

CONCLUSIONS

Conclusions: the new world tea order after Unilever

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