



Hot Drinks in Asia Pacific

May 2025

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Key findings

REGIONAL OVERVIEW

Asia Pacific has the biggest regional hot drinks market

Market remains resilient amidst volatility, but growth slows under market headwinds

Asia Pacific leads global tea market with strong regional consumption

Tea leadership positions China and India at the forefront of hot drinks

Coffee leads hot drinks growth across Asia Pacific

Tea powers growth in China and India, coffee takes the lead in other markets

Health, convenience, and localisation are reshaping hot drinks in Asia Pacific

Supermarkets and small local grocers lead retail distribution of hot drinks in Asia Pacific

Online and foodservice channels power Asia Pacific expansion

LEADING COMPANIES AND BRANDS

China standing out as the most fragmented market in the region

Multinationals expand regionally, while local champions stay rooted in home markets

Global giants hold firm as regional disruptors rise

FORECAST PROJECTIONS

Modest value and volume growth expected in the coming years

Wellness, digitalisation and localisation set the pace for Asia Pacific hot drinks

COUNTRY SNAPSHOTS

China: Market Context

China: Competitive and Retail Landscape

Hong Kong, China: Market Context

Hong Kong, China: Competitive and Retail Landscape

India: Market Context

India: Competitive and Retail Landscape

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Vietnam: Competitive and Retail Landscape

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