



Tea in Pakistan

December 2025

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Tea in Pakistan - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Improving economic conditions support growth

INDUSTRY PERFORMANCE

Improving economy boosts tea consumption

Black tea bags leads growth

WHAT'S NEXT?

Continued shift from unbranded to branded tea

Digitalisation will help to increase customer engagement

Health and wellness will become increasingly important growth driver

COMPETITIVE LANDSCAPE

Tapal Tea dominates sales

Vital Group leads growth

CHANNELS

Small local grocers continue to play key role

E-commerce is most dynamic channel

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Hot Drinks in Pakistan - Industry Overview

EXECUTIVE SUMMARY

Economic recovery fuels premiumisation in hot drinks

KEY DATA FINDINGS

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Robust growth for hot drinks, with tea remaining undisputed leader

Rising disposable incomes fuel premiumisation, with health and wellness impacting consumer choices

Urban café culture drives demand for coffee amongst younger consumers

WHAT'S NEXT?

Stabilising economy will boost demand

Tea will remain hot beverage of choice

Modern retail channel expansion will be key growth driver

COMPETITIVE LANDSCAPE

Tapal Tea leads amid growing competition

Vital Group leads growth through affordability strategy

CHANNELS

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E-commerce drives retail transformation

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