



Euromonitor
International

Hot Drinks in Germany

January 2026

Table of Contents

Hot Drinks in Germany

EXECUTIVE SUMMARY

Price increases fuel current value growth, limiting opportunities for premiumisation

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Growth stems from price increases as volume sales stagnate

Difficult balancing act for players in 2025

Health and wellness remains a key trend, despite price-consciousness

WHAT NEXT?

Gloomy outlook for sales of hot drinks

Functionality and sustainability will remain key concerns

Discounters set to benefit from ongoing price-sensitivity

COMPETITIVE LANDSCAPE

JDE Peets leads but faces increasing competition

Messmer Tea capitalises on wellness trend

CHANNELS

Discounters leads distribution in 2025

Themed

FOODSERVICE VS RETAIL SPLIT

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Coffee in Germany](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

INDUSTRY PERFORMANCE

Inflation continues to apply pressure to coffee prices in 2025

Growth reflects rising prices of coffee beans

WHAT'S NEXT?

Coffee set to remain the most popular caffeine boost despite price increases

Smart machines will offer personalised coffee experiences

Sustainability will remain vital for producers and local consumers

COMPETITIVE LANDSCAPE

Price-conscious consumers seek out promotions and discounts in 2025

Private label is a key beneficiary of inflationary environment

CHANNELS

Aldi and Lidl remain popular destinations for coffee purchases

Discounters post dynamic growth

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Tea in Germany](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

INDUSTRY PERFORMANCE

Fruit and herbal teas remain a popular choice for health-conscious Germans

Green tea benefits from social media profiling

WHAT'S NEXT?

Tea will remain popular as a naturally functional drink

Cold brew tea is likely to gain favour in milder climate conditions

Health and wellness will be at the forefront, while sustainability plays a key role

COMPETITIVE LANDSCAPE

Organic tea and innovative flavours allow Teekanne to retain its position

Functionality and portfolio expansion remain key focus for players

CHANNELS

Discounters benefit from ongoing price sensitivity in 2025

Aldi and Lidl enjoy reputation for quality

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025

Table 38 - Retail Sales of Tea by Category: Value 2020-2025

Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025

Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025

Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025

Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025

Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030

Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030

Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030

Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Other Hot Drinks in Germany](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

INDUSTRY PERFORMANCE

Other hot drinks decline overall, while plant-based variants enjoy value growth

Health and wellness trend benefits plant-based variants in 2025

WHAT'S NEXT?

Cost pressures and shifting preferences set to drive decline

Digital and technological innovations transform product development and distribution

Health and wellness trends will drive innovation in the coming years

COMPETITIVE LANDSCAPE

Nestlé retains leadership in other hot drinks, while Krüger drives dynamic growth

Aldi and Lidl benefit from price sensitivity

CHANNELS

Supermarkets lead other hot drinks distribution in 2025

Hypermarkets boasts growth by offering multi-pack deals and promotions

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025

Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025

Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025

Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025

Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/hot-drinks-in-germany/report.