



**Euromonitor
International**

Coffee in China

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumer upgrading contributes to retail value growth

INDUSTRY PERFORMANCE

Premiumisation trend and rising prices drive value growth but volume decline

Fresh coffee sees dynamism as consumer knowledge and coffee machine ownership rise

WHAT'S NEXT?

Multiple factors will contribute to growth, including a wider consumer base

Digital and technological advances are making their impact felt in coffee

Sustainability set to become an even more important factor in coffee

COMPETITIVE LANDSCAPE

Despite a falling value share, Nestlé's wide portfolio and long history maintain its lead in coffee

Yunnan Four Cats Coffee Co takes advantage of localisation, new launches, and social media

CHANNELS

Retail e-commerce leads distribution, due to its convenience, and product and service offering

Retail e-commerce is also the most dynamic distribution channel

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Hot Drinks in China - Industry Overview

EXECUTIVE SUMMARY

Although value sales see a marginal decline, upgrading is seen in some categories

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Premiumisation particularly evident in coffee and other hot drinks

Fruit/herbal tea meets consumers' needs on many levels

Rising costs impact customers and companies

Brands try to strike a balance between affordability and sustainability

WHAT'S NEXT?

Value growth anticipated, but challenges will remain

International players likely to reshape their product portfolios

The integration of online and offline channels will be important

COMPETITIVE LANDSCAPE

Yunnan Taetea (Dayi) Tea Industry Group maintains its lead in a fragmented industry

Local brands perform well, while international brands are adapting

CHANNELS

Retail e-commerce is dynamic and becomes the leading distribution channel

Smaller local retailers remain popular but are challenged by more modern channels

Synergies between retail and foodservice channels

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