



**Euromonitor
International**

Hot Drinks in the US

November 2025

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EXECUTIVE SUMMARY

Retail value sales maintain their rising trend, although volume sales decline

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Competition from outside of hot drinks and rising prices hamper volume growth

Premium functional tea and coffee still see growth opportunities

Increasing interest in health helps maintain the popularity of hot drinks

Climate crises and tariffs impact the prices of imported hot drinks

WHAT'S NEXT?

Value growth anticipated, but volume growth potential will be impacted by competition and price rises

Intentional consumption will offer opportunities for products offering benefits

Splitting of hot drinks and soft drinks businesses likely to be seen

COMPETITIVE LANDSCAPE

Keurig extends its lead in hot drinks thanks to its wide portfolio in fresh coffee

The surge in sales of instant coffee benefits the leader in this category, Nescafé

CHANNELS

Retail e-commerce leads across categories

Nespresso is particularly successful with online sales

The foodservice offering is compelling

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Supply constraints and tariffs raise prices, driving retail value growth

INDUSTRY PERFORMANCE

Continued price rises prevent volume growth but drive value growth

Economic uncertainty drives instant coffee to see the strongest growth

WHAT'S NEXT?

Pressures expected to continue, driving value growth and marginal volume decline

The application of technology in coffee

Sustainability likely to remain an aim, but challenging to achieve

COMPETITIVE LANDSCAPE

Keurig extends its share, but second-placed JM Smucker sees stronger growth

Black Rifle Coffee maintains its dynamic growth trend

CHANNELS

Retail e-commerce continues its long-standing rising trend as consumers seek convenience

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[Tea in the US](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and wellness trend drives retail value and volume growth for tea

INDUSTRY PERFORMANCE

Growth continues, with consumers opting for the convenience of tea bags in black tea

Green tea sees dynamism thanks to demand for matcha among younger consumers

WHAT'S NEXT?

Value growth expected to continue as consumers seek functional teas
Use of technology expected across the supply chain
Uncertainty about import prices of tea moving forward

COMPETITIVE LANDSCAPE

A greater focus on health by the leading player
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CHANNELS

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[Other Hot Drinks in the US](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

With continued retail volume decline, companies look for ways to revitalise sales

INDUSTRY PERFORMANCE

Challenges to volume growth, but rising input costs ensure value growth is maintained
Chocolate-based flavoured powder drinks is in a transitory phase

WHAT'S NEXT?

Value sales set to rise, but volume decline anticipated, due to rising input costs and demographic shifts
Exploration of alternatives to address supply chain challenges for coffee and cocoa
Opportunities through offering products with functional benefits

COMPETITIVE LANDSCAPE

Smaller players struggle to take share from ConAgra's Swiss Miss
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CHANNELS

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