



# Other Hot Drinks in Pakistan

December 2025

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## Other Hot Drinks in Pakistan - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Urbanisation drives sales of other hot drinks

#### INDUSTRY PERFORMANCE

Rising urbanisation boosts demand for convenient, packaged offerings

Chocolate-based offerings are increasingly desirable

#### WHAT'S NEXT?

Absence of local players offers significant opportunity

Re-entry of Ovaltine signals new confidence in Pakistan

Expansion of health-focused offerings

#### COMPETITIVE LANDSCAPE

Nestlé's Milo maintain its lead

Milo meets needs of increasingly health-conscious parents

#### CHANNELS

Small local grocers leads sales

Hypermarkets represents 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

#### INDUSTRY PERFORMANCE

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

Traditional stores lead sales  
E-commerce drives retail transformation  
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