



Tea in Australia

November 2025

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Tea in Australia - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growing wellness demand and matcha-led momentum reshape category performance

INDUSTRY PERFORMANCE

Tea sees moderate value growth as matcha drives renewed interest among younger consumers

Green tea emerges as the most dynamic category as matcha moves firmly into the mainstream

WHAT'S NEXT?

Tea expected to maintain steady value growth, driven by wellness-led innovation

Gifting culture becomes an increasingly important volume driver across premium tea

Functionality continues to shape innovation as tea broadens its role in daily wellness routines

COMPETITIVE LANDSCAPE

Twinings maintains leading position through broad portfolio, wellness focus, and strong brand equity

ITO EN emerges as the most dynamic company, supported by rising matcha demand and localised production

CHANNELS

Supermarkets remain the primary distribution channel as retailers expand wellness-focused assortments

E-commerce sees rapid growth as digital investment, convenience, and subscriptions expand reach

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Hot Drinks in Australia - Industry Overview

EXECUTIVE SUMMARY

Hot drinks maintain steady value growth amid inflation easing and shifting consumer priorities

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INDUSTRY PERFORMANCE

Health, functionality and clean-label trends reshape product development

Ethical sourcing and sustainability strengthen brand positioning

Matcha shifts from niche trend to mainstream staple

WHAT'S NEXT?

Outlook shaped by stabilising prices, renewed confidence and evolving consumer priorities

Functional reformulation and wellness-led innovation to accelerate

Sustainability set to become a baseline expectation

COMPETITIVE LANDSCAPE

Nestlé maintains category leadership through breadth, innovation and domestic investment
Coffee stands as the most dynamic category, fuelled by both premium and affordable innovation

CHANNELS

Supermarkets remain the dominant channel supported by value seeking and private label expansion
E-commerce remains the fastest-growing channel through expanded fulfilment and digitally led retail execution

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