



Euromonitor
International

Where Consumers Shop for Hot Drinks

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Key findings

Hot drinks at a premium, with prices up and volumes under pressure

STATE OF THE INDUSTRY

From price surge to steadier, premium-led growth in hot drinks

Small affluent markets spend the most, while emerging markets grow fastest

Mature coffee markets plateau as emerging regions build scale

Offline dominates, but online is driving a wave of growth

OFFLINE RETAIL

Offline remains the backbone, led by supermarkets and traditional trade

Value channels gain, hypermarkets decline

Store-based hot drinks are grocery-led; non-grocery as a niche play

Grocery channel performance is diverging

Non-grocery is niche, but wellness retail is a clear bright spot for tea

Vending: The need-state channel for hot drinks

Chai-to-go from ChaiGPTea: A proposition for offices and premium locations in the UK

RETAIL E-COMMERCE

E-commerce is strategically important to target different consumer types

About transparency, subscriptions and seasonality

Scale markets lead online hot drinks as catch-up markets accelerate

E-commerce winners: From repeatable coffee to discoverable tea

Marketplaces and online grocery: The two engines of e-commerce sales

Platforms for scale, brand ecosystems for loyalty

Nespresso and Coveo: Smarter search, stronger conversion

CONCLUSION

The evolving hot drinks route-to-market

Recommendations for hot drink brands: Where to focus investment and avoid mistakes

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Euromonitor Passport E-Commerce: Coverage and methodology

About Euromonitor International

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For more information on this report, further enquiries can be directed via this link www.euromonitor.com/where-consumers-shop-for-hot-drinks/report.