



Euromonitor
International

Where Consumers Shop for Hot Drinks

June 2025

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INTRODUCTION

Key findings

WHERE CONSUMERS SHOP FOR HOT DRINKS

Hot drinks show strong growth in e-commerce sales globally

STATE OF THE INDUSTRY

A spike in value sales in 2024 hides increasingly concerning volume challenges

Spending growth is positive outside of a handful of mature European markets

Coffee dominates hot drinks spending, although tea has the edge in volume

Asia Pacific is the largest region, but Latin America leads growth

E-commerce set to pose competition to retail offline channels in hot drinks

OFFLINE RETAIL

Winning the shelf: How value, convenience and local access are reshaping retail sales

Hot drinks sales have grown fastest in small local grocers and discounters

Grocery dominates overall hot drinks volume, but opportunities in non-grocery channels

Discounters see strong growth amidst high cost of living environment

Small, independent and traditional retail formats remain vital for hot drinks growth

Stop & Shop highlights its affordable but premium new line of coffee

Out-of-home channels offer exciting options to consumers beyond retail

RETAIL E-COMMERCE

Asia Pacific and North America drive global e-commerce gains

Tea in e-commerce dominate online sales, driven by social marketplaces

US remains the leading market for hot drinks e-commerce globally

Tea records faster growth in e-commerce than coffee, driven largely by China

Online marketplaces remain the key channel for hot drinks e-commerce sales

Amazon is the leading e-commerce retailer

Fiboo is set to strengthen its competitive positioning by offering functional health claims

CONCLUSION

Evolution of consumption occasions of hot drinks

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Euromonitor Passport E-Commerce: Coverage and methodology

About Euromonitor International

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Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

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