DEUTSCHER
TEE & KRÄUTERTEE
VERBAND

Tea Report 2025

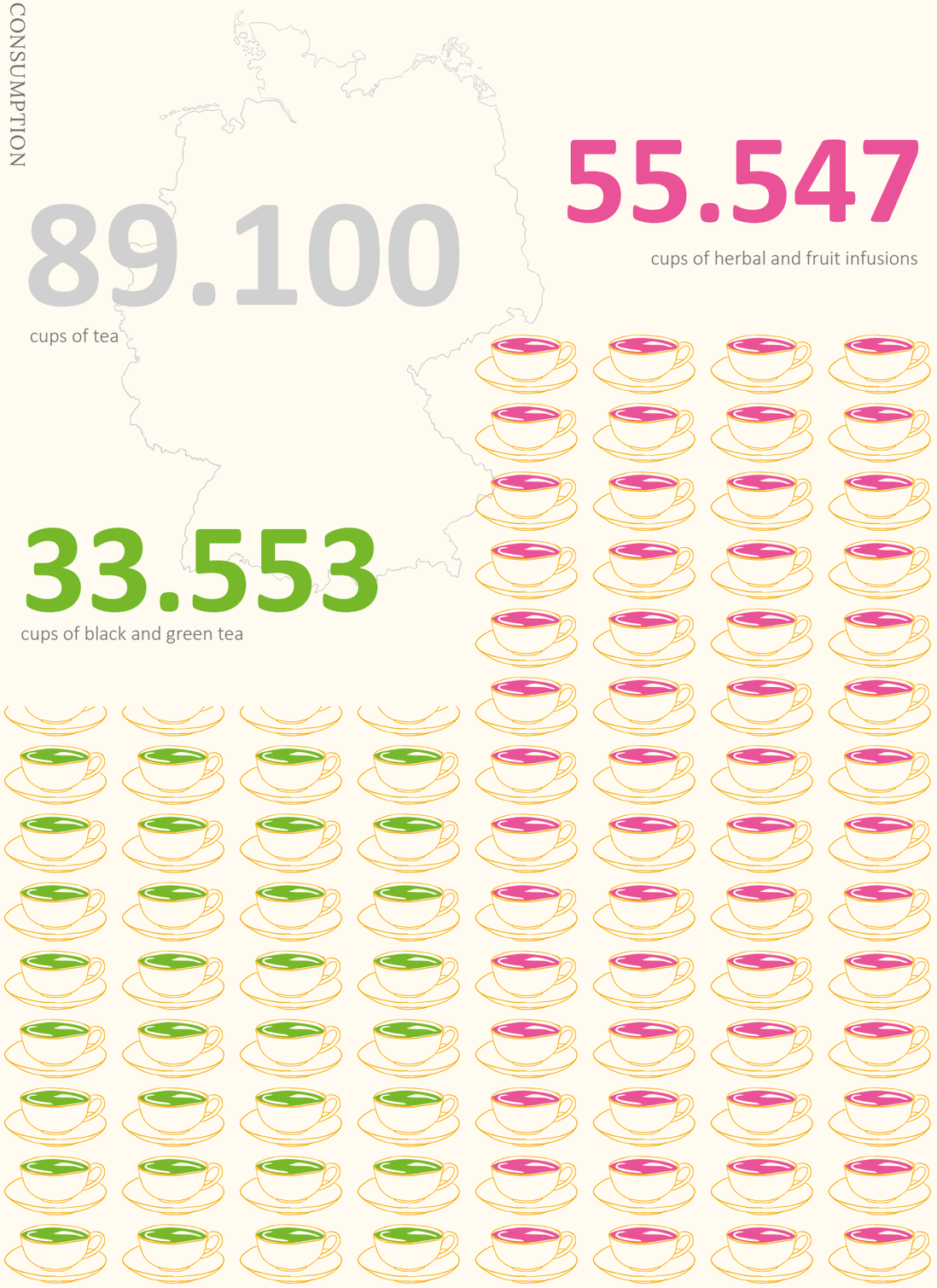
Diversity and Trust.
United in Tea.

Diversity wins

It’s 2025 and tea-report time once again. In this year’s edition. the German tea sector looks back on 12 months that once again underscored diversity as one of tea’s greatest strengths. Classic teas as well as herbal and fruit infusions have continued to cement their place in German hearts and homes with a broad portfolio delighting an ever-wider spectrum of consumers. One telling highlight: sales of certified-organic teas climbed markedly. A youthful appetite for matcha also breathed new life into other green tea specialities. Specialist tea shops rang up higher sales, and out-of-home consumption ticked upward. Cold-brew teas, meanwhile, remain a safe staple among those who indulge.

But it’s not just their variety that earns German teas a place in the beverage buyers’ hearts. Both domestically and overseas, the quality and innovation on show are one of the key draws. And the icing on the cake alongside this acclaim are the credible sustainability commitments of many member companies of the German Tea & Herbal Infusions Association. We surveyed them and compiled the findings- complete with best-practice case studies- into an extensive online brochure. See page 14 for more details.

So settle in with this snapshot of tea's remarkable 2024 journey- complete with all the facts, figures and fascinating trends. Pour yourself a cuppa and enjoy the read!



Germany's per-minute brewing scorecard

Tea is everywhere

Germany's tea lovers sipped their way through 67.2 litres per person in 2024- that's 27.1 litres of black and green teas paired with a hearty 40.1 litres of herbal and fruit infusions. Consumption dipped by just 1.5% from the previous year, barely a blip considering how inflation has been squeezing grocery budgets across the board.

To put tea's starring role into perspective, let's talk numbers: Germans brewed nearly 47 billion cups of tea, herbal and fruit infusions throughout the year. Break that down and we're looking at over 89,000 cups being poured every single minute of 2024. These figures paint a vivid picture of just how deeply tea has woven itself into the fabric of daily life.

The happiness-maker that wears many hats: versatile thirst-quencher, nutritional powerhouse, morning energiser, fitness companion, wish-granter, and relaxation enabler all rolled into one. The organic share jumped another 2 percentage points in 2024, while specialist tea shops saw growing footfall- clear signs that buyers are becoming more invested in what they're brewing. Matcha’s style-icon status proves tea can be hip, while its wellness halo keeps pace with a health-savvy public.

With their multifaceted appeal and feel-good factor, tea, herbal and fruit infusions have permeated every demographic- from Gen Z to golden-agers- catering to widely different needs while granting wishes left, right and centre.

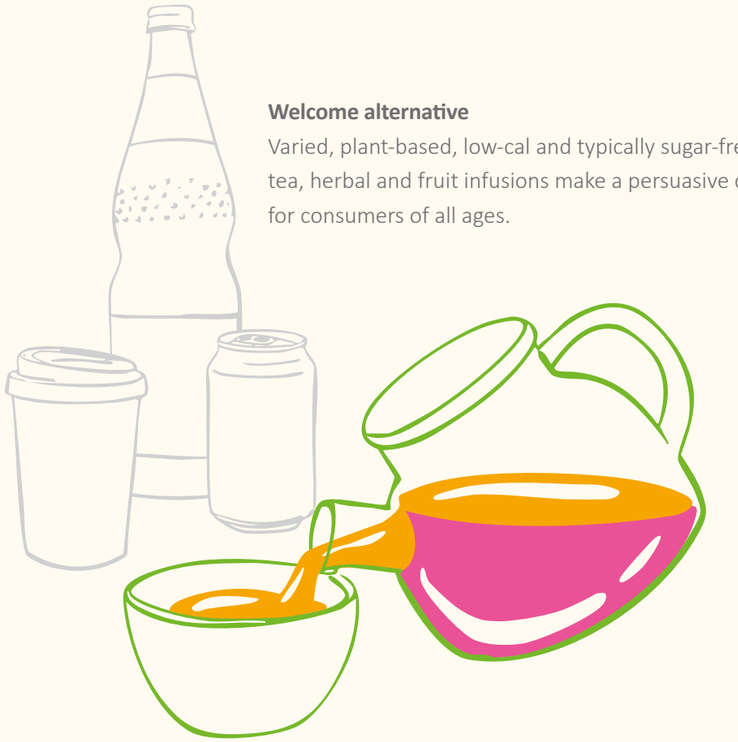
Tea and its story

Has tea's success story reached its final chapter? Not even close! The natural diversity of tea, herbal and fruit infusions continually provides new purchasing impulses, as does the innovative strength of the German tea companies.

Add society's shift towards mindful eating and fitness, and tea emerges as the versatile beverage of choice. Tea in Germany has cultivated a modern, mindful image, and consumers are fascinated by the blend of ancient tradition and contemporary cool. Meanwhile, the growing appreciation for Asian cuisine and culture boosts its appeal still further.

Whenever you seek a quick and easy pick-me-up – dashing around, doing a workout or desk-bound – hot-steeped or cold-brewed teabags more than hit the spot. But for those crafting moments of mindfulness, the ritual itself becomes the reward: the gentle pour, the patient steep, the anticipated first sip. Or go full tradition with matcha or an authentic tea ceremony.

German tea companies keep consumers on their toes with an endless parade of product innovations and specialties. And powerful pillars underpin this creative confidence too: stellar quality, food safety credentials and sustainable practices. Once you've fallen for tea, there's always another variety to explore, another ritual to master. What better news for drinkers, producers and tea itself.



Welcome alternative

Varied, plant-based, low-cal and typically sugar-free: tea, herbal and fruit infusions make a persuasive case for consumers of all ages.

Protecting consumers and tea

In all truth, German tea producers have every reason to raise their cups in celebration. Their products enjoy rock-solid acceptance and appreciation: sales are solid, partnerships in the countries of origin are robust and sustainability is not the exception, but is already firmly anchored in many member companies.

But storm clouds are gathering on this sunny horizon. The bureaucratic burden keeps ballooning, thanks to sustainability legislation that - while well-intentioned in its supply chain ambitions - is drowning businesses in documentation demands and pushing partnerships to breaking point.

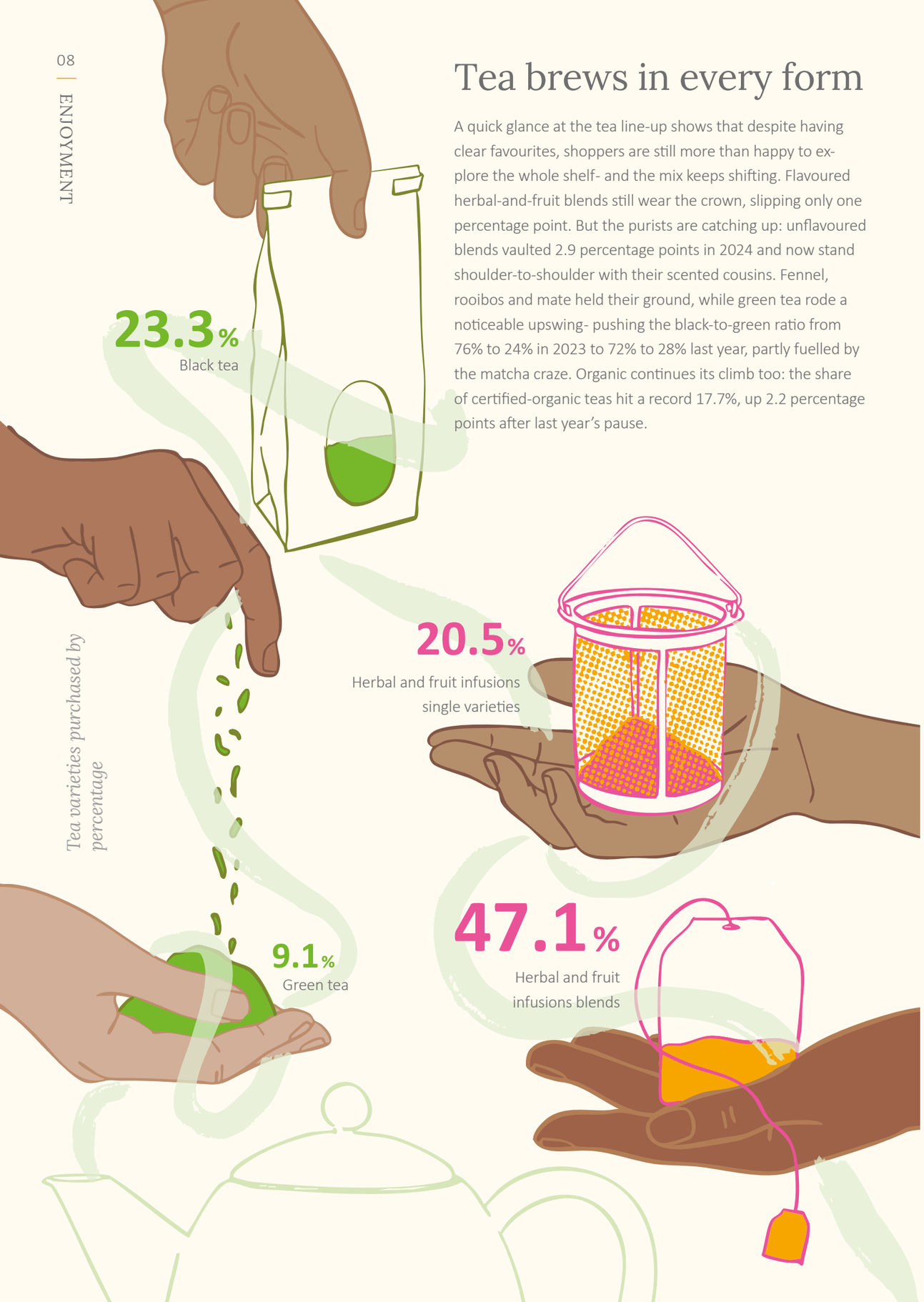
New regulations prove near-impossible to meet when ridiculously short transition periods clash head-on with harvest cycles. Maximum residue levels for pesticides keep plummeting to trace amounts - even when these substances originate from the environment and growers have zero control over their presence on plants. The result? Entire tea varieties are vanishing from shelves because they can't clear the regulatory bar. Testing costs are skyrocketing while tea diversity is nosediving, as more and more suppliers simply give up on EU exports rather than navigate the increasingly unworkable requirements.

If Germany is to keep offering the rich, safe and quality spectrum consumers expect, we desperately need red tape to be slashed and regulations to be tempered with a healthy dose of common sense.

Tea brews in every form

A quick glance at the tea line-up shows that despite having clear favourites, shoppers are still more than happy to explore the whole shelf- and the mix keeps shifting. Flavoured herbal-and-fruit blends still wear the crown, slipping only one percentage point. But the purists are catching up: unflavoured blends vaulted 2.9 percentage points in 2024 and now stand shoulder-to-shoulder with their scented cousins. Fennel, rooibos and mate held their ground, while green tea rode a noticeable upswing- pushing the black-to-green ratio from 76% to 24% in 2023 to 72% to 28% last year, partly fuelled by the matcha craze. Organic continues its climb too: the share of certified-organic teas hit a record 17.7%, up 2.2 percentage points after last year's pause.

Tea varieties purchased by percentage



Clear differences: Loose or bagged?

The battle lines are clearly drawn. For black and green teas, loose leaf and teabags are virtually neck-and-neck at 51% to 49%, with bags gaining 3 percentage points over ground varieties. Herbal and fruit infusions tell a different story entirely: 15% were purchased loose, 85% in bags. Still, loose herbal and fruit infusions climbed 3 percentage points compared to 2023 – perhaps a sign of growing connoisseurship.

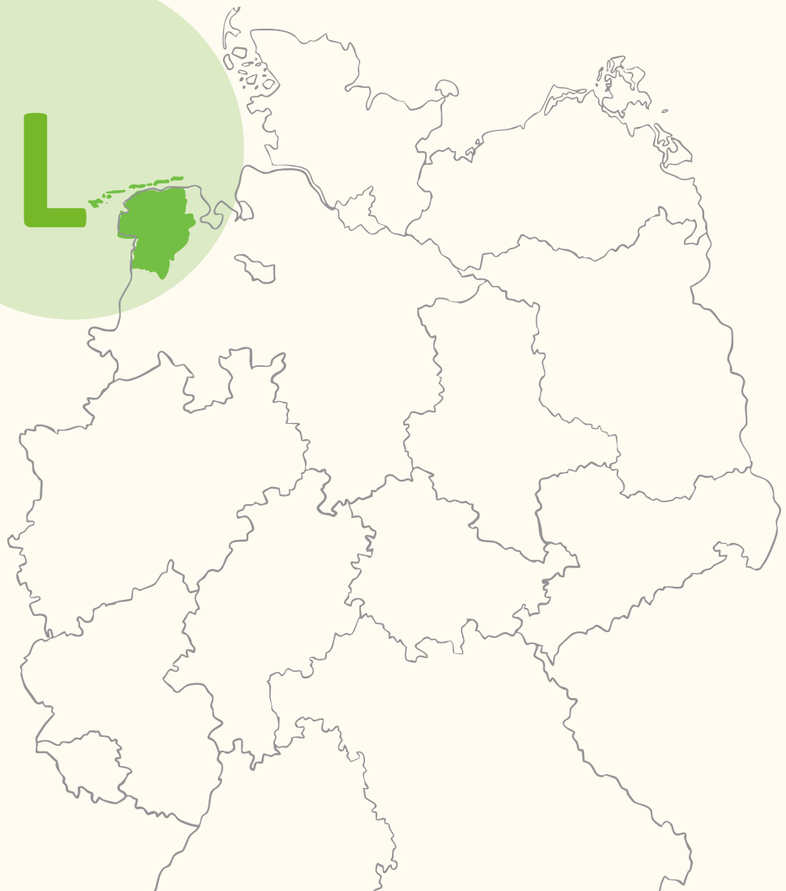
85%

15%

300 L

A tea dream

It's as you were in East Frisia: no tea no life.
Each year, these coastal dwellers knock back a staggering 300 litres of black and green tea per person and remain top of the table.



Germany's top teas

Herbal and fruit infusions still reign supreme on German shopping lists. Domestic consumption clocked in at 39,398 tonnes in 2024- just a whisker down from the previous year. Blends – both flavoured and unflavoured – dominate the popularity charts, accounting for 27,421 tonnes. With a 3-percentage-point jump from 2023, blends are pulling ever further ahead of single variety offerings.

The standout trend? Unflavoured blends rocketing up by 2.9 percentage points. Among single varieties, peppermint and chamomile continue to win hearts, while fennel, rooibos and mate hold steady. Cold-brew teas have carved out their niche at 1% market share and show no signs of budging. Herbal and fruit infusions bask in their health halo- seen as versatile thirst-busters that go from bag to cold brew in seconds, while functional varieties deliver bonus benefits with every sip. German tea producers have a knack for keeping the market buzzing, regularly rolling out new product ideas that have shoppers reaching for their wallets.

Best-loved solo stars

7.5 % Peppermint

4.2 % Chamomile

3.7 % Fennel

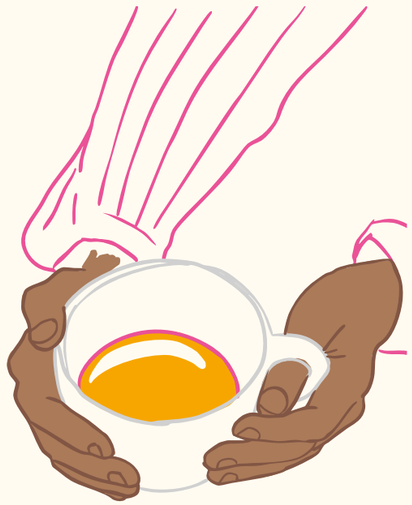
2.9 % Other single varieties

1.8 % Rooibos

0.4 % Mate

23.6 % Unflavoured blends

23.5 % Flavoured blends



The figures in this graphic relate to the total tea market.

Expert advice appreciated

Tea's rising star status is driving more footfall to specialist tea shops, which rang up nearly 2 percentage points more in over the counter sales in 2024 than the previous year. Loose black and green teas are predominantly discovered and purchased here, often with expert advice.

Don’t mind if I do

Tea's remarkable variety isn't just conquering kitchen cupboards - it's everywhere from corner shops to cafés. In 2024, traditional food retailers commanded just over 40% of tea, herbal and fruit infusions’ sales, discounters grabbed 17.7%, specialist shops secured 12.5% and drugstores claimed 11.1%. The hospitality sector's thirst grew by 0.5 percentage points to reach 4.3%.

Shares of distribution channels

40.1 % Grocery retail

17.7 % Discounters

11.1 % Drugstores, health food stores & pharmacies

12.5 % Specialist tea shops

4.3 % Restaurants & bulk customers

4.1 % Food processing industry

4.1 % Specialist shops for international foods

3.3 % Online and mail-order retail

2.6 % Other B2B sales channels

0.2 % Other

The figures in the graphic show the market share distribution of the total market of 58,215 tonnes in 2024.

Total German market

67.7%
Herbal and fruit infusions

* Discrepancy from 100% is due to rounding to one decimal place.

Hungry for variety

Matcha mania, blends booming, single varieties still standing strong – just to name-drop the latest trends. Armed with nature's treasure trove of tea, herbal and fruit infusions, manufacturers have a world of raw materials at their fingertips, constantly crafting new creations that capture consumer imagination. German tea producers? They've earned their stripes as the creative industry powerhouses.

Cold-brew teas

From bright idea to market darling – cold-brew teas have muscled into line-ups in record time. Though the concept seemed odd at first (teabags steeped in cold water?), these refreshing rebels quickly claimed their spot on shelves and in hearts. With a 1% or so market share firmly in place, they've become go-to guilt-free thirst-quenchers for scorching days, gym sessions, on-the-go moments or at school.

Organic trailblazer

~1%

After last year's pause, organic's share jumped a healthy 2.2 percentage points in 2024, reaching a delightful 17.7% of total volume. Tea drinkers are voting green with their wallets at rates that leave other food categories in the dust. For comparison: According to BÖLW, Germany's overall organic food turnover sat at just 6.3% in 2023.

*Source: German Federation of Organic Food Producers (BÖLW), Sector Report 2025.

17,7%
Organic market share

Respect for people and planet

In 2024, the German Tea & Herbal Infusions Association launched a major sustainability survey among its members. German tea companies – with their deep-rooted partnerships in origin countries and first-hand experience of climate change impacts on their natural products – are stepping up to the plate. Social and ecological engagement isn't just talk; it's action.

Our brochure "Respect for People and Planet: How Sustainability Moves the Tea Industry" summarises those results, showcases achievements and spotlights challenges head-on. Packed with fascinating real-world examples and providing an insight into the daily business of the companies. It's a must-read and is published on our website.

Download here
teeverband.de/der-verband/nachhaltigkeit/

On top: Our leading suppliers

Total import volume broken down into black and green tea

1.013 tonnes green tea
9.430,4 tonnes black tea

India keeps its crown as Germany's top tea supplier, despite imports dipping by 523 tonnes. With just over 10,443 tonnes delivered, India commanded 21.8% of German imports in 2024. The subcontinent sent us 9,430 tonnes of black tea alongside 1,013 tonnes of green tea – though its overall share slipped nearly 2 percentage points year-on-year.

Sri Lanka stood alone among the major origins in posting gains, climbing to second place in Germany's supplier rankings for 2024. The island nation shipped just over 9,524 tonnes our way – up nearly 500 tonnes or a solid 5.5%.

164,3 tonnes green tea
9.359,9 tonnes black tea

6.704,8 tonnes green tea
2.132,6 tonnes black tea

China ranks third in the volume of imported tea and is, as usual, our largest supplier of green tea. Just over 8,837 tonnes made their way from China to Germany, including 2,132 tonnes of black tea and 6,704 tonnes of green tea, only marginally down from 2023.

106 tonnes green tea
5.225,5 tonnes black tea

Afrika – including Kenya, Malawi and Rwanda – continues as a powerhouse supplier, delivering almost 5,332 tonnes (11.1% of imports) from various African nations to German tea producers for processing. Its market share stood at 11.1%, only a slight dip from 2023. Green tea plays only a small part here, sliding by over 38%.

Cherish and protect tea

Tea, herbal and fruit infusions aren’t just drinks – they're woven into the fabric of our daily culture and cornerstone of balanced nutrition. Their remarkable diversity enriches life and creates moments worth savouring. So far, so brilliant. But gathering storm clouds of regulations and red tape threaten to choke off the flow of natural ingredients from origin countries.

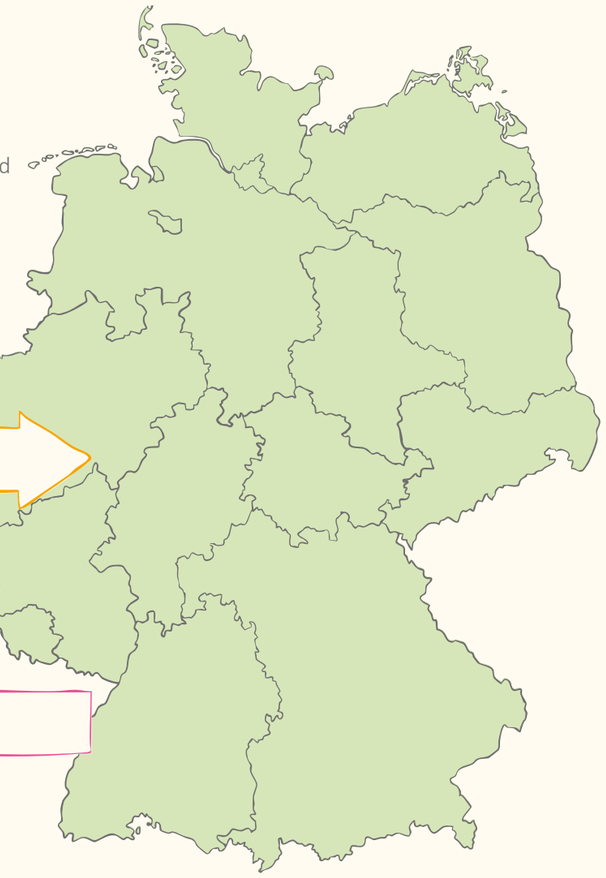
German firms source from 90-plus countries, working with roughly 400 plant parts from more than 300 different plants to craft their beloved creations. Whether this botanical bounty will remain accessible is an open question, as more growers shy away from the EU's ever-mounting bureaucratic maze. At stake: not just tea's diversity, but its very soul as a natural, versatile delight.

Not a day without tea

Morning, noon, night and all the moments in between: tea, herbal and fruit infusions are the perfect daily companions, ready to please however drinkers fancy them. Caffeinated wake-up call or caffeine-free wind-down, low-cal thirst-buster or indulgent specialty – tea is everywhere. Best of all? Young consumers are embracing it in droves: as a lifestyle essential, a matcha statement-maker or a smart swap for water or sugary drinks. Tea is considered healthy and positive and the German tea producers keep the excitement brewing with functional blends, cold brews and a constant stream of global specialities.

Growing exports

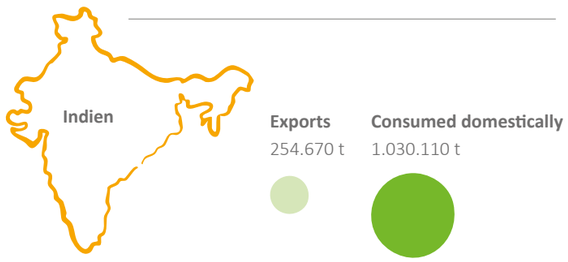
Of the 47,846 tonnes that landed in Germany in 2024, just over 21,411 tonnes set sail again for foreign shores – in the previous year, the figure was less than 20,000 tonnes. Tea processed and refined by German companies continues to enjoy an excellent reputation in many European countries and in markets like the USA. The high standards under which tea is traded and processed in Germany make it a sought-after export commodity.



Domestic requirements and exports of large producers

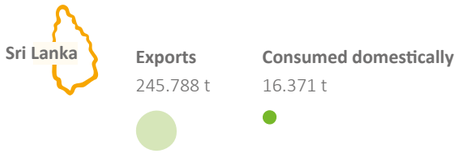
World tea production burst through the 7-million-tonne barrier for the first time in 2024, surging 6.8% year-on-year. China single-handedly powered 90% of this growth, ramping up production by a staggering 12%. Producer countries shipped out nearly 1.9 million tonnes – up 8.2% on the previous year – representing just over 26.6% of total output. That leaves a whopping 70%-plus brewing in domestic teapots. But the home-versus-export split varies wildly by country The big four tea producing countries – China, Kenya, India and Sri Lanka – collectively dominate over 76% of global tea exports. Turkey is the odd one out: despite ranking as the world's fourth-largest tea producer with almost 273,000 tonnes, it exports a mere 2% of its harvest, making barely a ripple in international trade.

At just shy of 598,500 tonnes, Kenya powered its way to a new all-time peak, cementing its position as the world's third-largest tea producer while remaining the undisputed export champion. The nation's export volume soared by another 71,500 tonnes between 2023 and 2024, commanding a mighty 31.6% slice of the global tea export pie.



India holds firm as the world's second-largest tea powerhouse after China. While production took a hit – dropping nearly 83,000 tonnes or just over 6% year-on-year – the subcontinent pivoted impressively, boosting exports by a remarkable 30,000 tonnes. This export surge secured India a solid 13.6% share of the global tea trade in 2024.

China continues to reign supreme as the world's undisputed tea titan. The "Middle Kingdom" boosted production by nearly 490,000 tonnes in 2024 compared to the previous year, churning out a colossal 3,740,000 tonnes in total. The share of global tea exports stood at 19.9%.



Sri Lanka maintains its spot as the world's fifth-largest tea producer, nudging production up by around 6,000 tonnes to reach 262,159 tonnes year-on-year. The island nation shipped out a total 245,788 tonnes of its precious harvest. The share of global tea exports in 2024 was slightly above 13%.

These nations shape the international tea market

The same five heavyweights have ruled the tea world for years: China, India, Kenya, Turkey and Sri Lanka. In 2024, China alone produced over 53% of the planet's tea – more than half the global harvest flowing from a single nation. India contributed over 18%, while Kenya added around 8.5% to the pot. Do the maths and these three giants are brewing almost 80% of the world's tea between them. Sri Lanka (around 3.7%) and Turkey (nearly 4%) round out this elite quintet, which together accounts for over 87% of all tea produced worldwide in 2024.

From like to hype: What makes tea consumers tick

Consumers appreciate tea, herbal and fruit infusions and demand excellence from their brews and the brands behind them. Today's shopping criteria read like a wellness manifesto: sustainability credentials, organic certification, health benefits and balanced nutrition top the must-have list. But it's not all earnest virtue – tea drinkers love discovering new flavour territories and welcome surprising creations that shake up their routine. Matcha, functional teas and cold-brew teas as well as specially colour intensive teas are emerging as product trends with real hype potential.

What's hot? Whats's happening?

No question – tea buyers have impeccable taste and genuinely appreciate the benefits and variety on offer. However, there are also clear favourites among the teas we buy. For classic teas, it's specific varieties that rule the roost; for herbal and fruit infusions, flavour profiles call the shots. Here's what's topping the charts:

The top 5 classic teas

Matcha

Earl Grey

Darjeeling

East Frisian blend

Green teas

The top 5 herbal and fruit infusions

Peppermint & mint blends

Red fruit blends

Fennel-Anise-Caraway

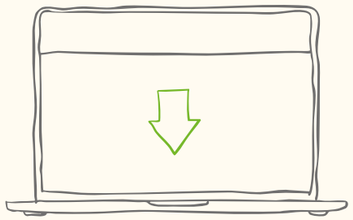
Chamomile

Rooibos
vanilla / caramel

In brief: Key facts from the Tea Report 2025

SUSTAINABILITY

German Tea & Herbal Infusions Association members are going all-in on sustainability. Their serious commitment is documented in a comprehensive report published May 2025. Essential reading!



Link to sustainability report
www.teeverband.de/der-verband/nachhaltigkeit/

HERBAL HEROES

7,5 %

Peppermint reigns as Germany's favourite single herb. Chamomile takes silver.

SHOPPING HOTSPOTS

A solid **40 %** of all tea, herbal and fruit infusions sold through grocery retail in 2024. Specialist tea shops saw sales climb nearly 2 percentage points year-on-year.

ORGANIC IS POPULAR

17,7 %

of the tea sold in 2024 was organic. Over 2 percentage points more than the previous year.

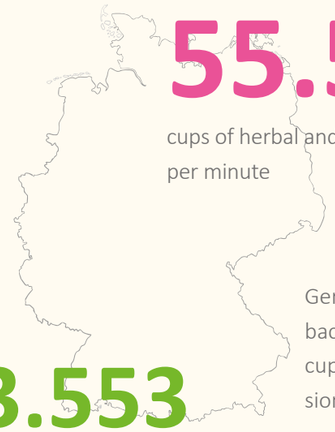
TEA TRENDS

Matcha, green tea specialities and functional teas are having their moment. Whether savoured for pleasure, served in hospitality or grabbed for active lifestyles, tea, herbal and fruit infusions are enriching lives and diets everywhere.

THIRST-QUENCHERS

Health-conscious consumers keep driving demand. Cold-brew teas have cemented their status as the low-cal alternative to sugary drinks for sport, school and leisure.

DESIRE FOR TEA



55.547

cups of herbal and fruit infusions per minute

Germans knocked back nearly 47 billion cups of tea and infusions in 2024.

33.553

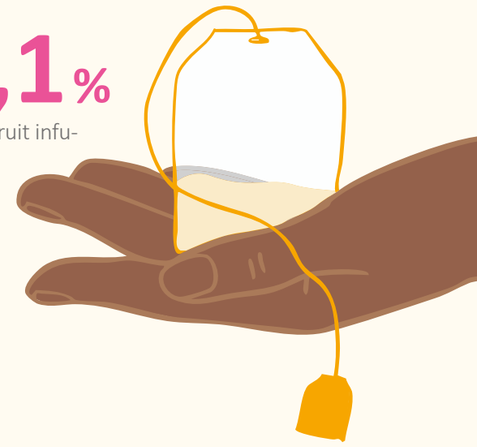
cups of black and green tea per minute

FAVOURITES

Flavoured and unflavoured herbal and fruit blends gained 3 percentage points on single varieties in 2024.

47,1 %

Herbal and fruit infusion blends



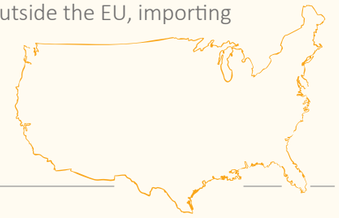
PEAK PERFORMANCE

East Frisia's love affair with tea remains legendary! These northern Germans drink 300 litres per person annually.

300 L per capita

EXPORT EXCELLENCE

German tea companies shipped to 106 countries in 2024. The USA remained the biggest customer outside the EU, importing over 2,600 tonnes.



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Sources: The German Tea & Herbal Infusions Association (tea), Hamburg: pp. 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 22, 23, 24 | International Tea Committee (ITC), London, UK: pp. 20, 21, 24 | Federal Statistical Office, Wiesbaden: p. 16, 17, 18, 19, 24