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China Tea Export Analysis Report

September 2025

Report Date: November 11, 2025

EXECUTIVE SUMMARY

Overall Performance: China's tea exports for the first nine months of 2025 totaled 306.97 million KG, representing a 4.6% increase compared to the same period in 2024 (293.37 million KG).

Key Highlights:
• Pure green tea (绿茶) exports surged by **15.8%**, reaching 269.62 million KG
• Total unfermented teas (including jasmine, flower, and white tea) represent 89.8% of exports, totaling 275.53 million KG
• Black tea (红茶) exports declined sharply by **54.5%**, falling to 19.00 million KG
• September 2025 showed strong momentum with a **7.7% increase** over September 2024
• Morocco, Uzbekistan, and Senegal lead as top destinations with significant growth
• African markets dominate the top 10, accounting for the majority of export volumes

1. YEAR-TO-DATE PERFORMANCE (JAN-SEP 2025)

1.1 Total Export Volume

2025 YTD (Jan-Sep)	2024 YTD (Jan-Sep)	Change
306,971,072 KG	293,370,518 KG	+13,600,554 KG (+4.6%)

1.2 Green Tea (绿茶) Volume

Note: Pure green tea only, excluding jasmine tea, flower tea, and white tea (which are reported separately below).

2025 YTD	2024 YTD	Change
269,615,062 KG	232,841,595 KG	+36,773,467 KG (+15.8%)

1.2.1 Other Unfermented Tea Categories

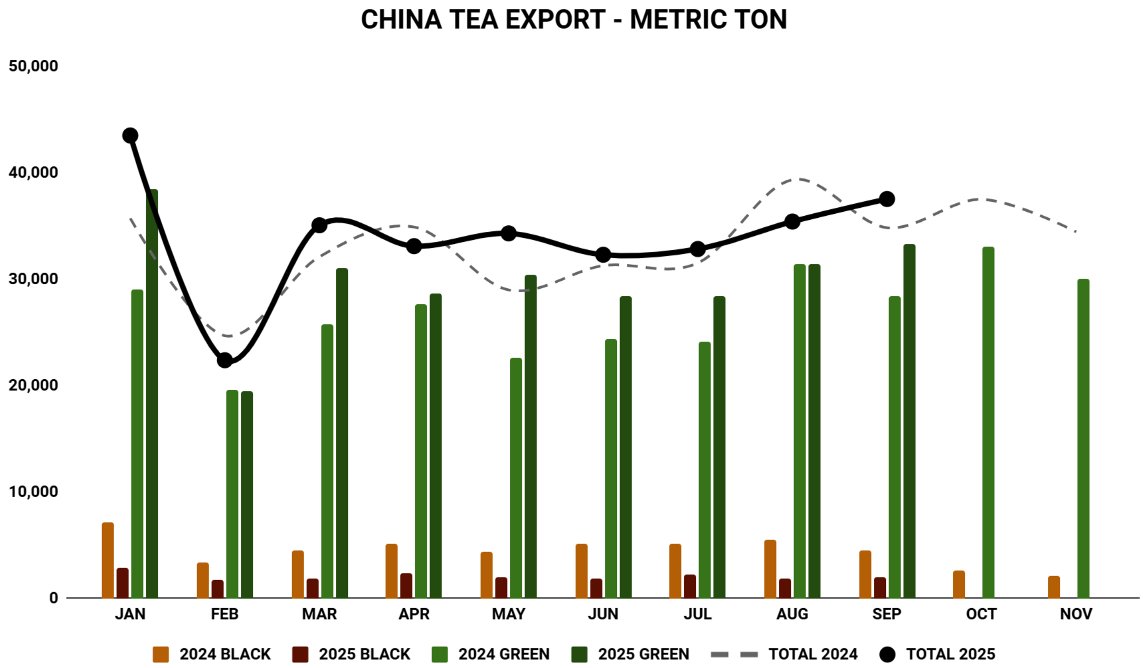
In addition to pure green tea, the following unfermented tea categories contributed to total exports:

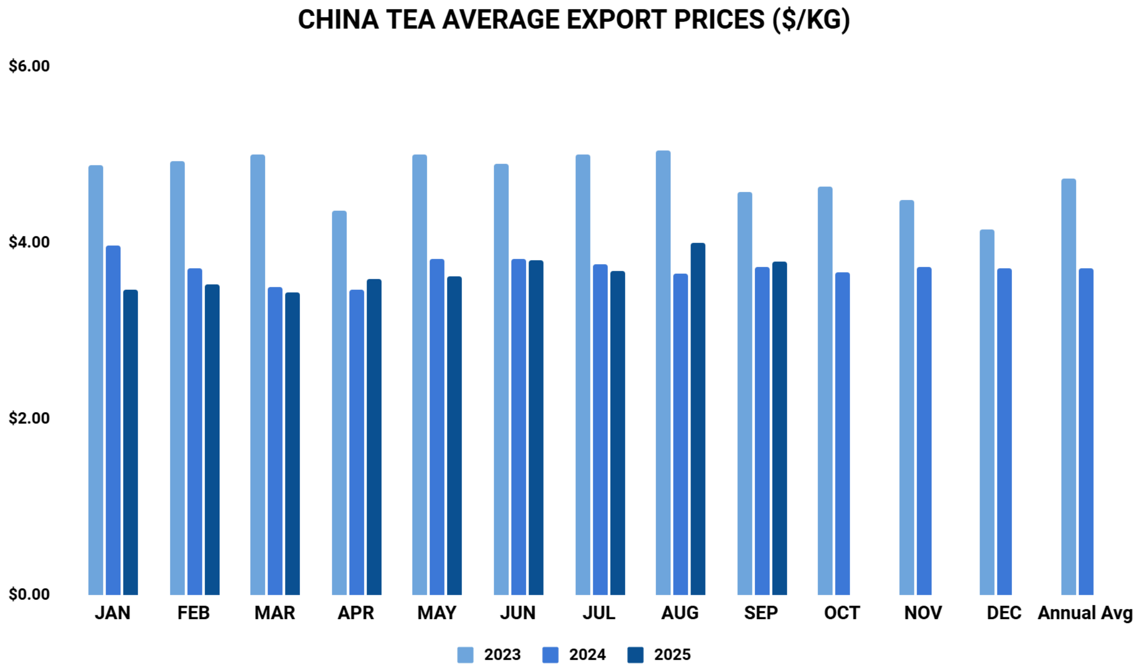
- Jasmine Tea (茉莉花茶): 5,464,868 KG (+15.3% vs 2024 YTD)
- Other Flower Tea (其他花茶): 108,472 KG (-32.0% vs 2024 YTD)
- White Tea (白茶): 341,235 KG (+1.5% vs 2024 YTD)
- Total All Unfermented Teas: 275,529,637 KG (representing 89.8% of total exports)

1.3 Black Tea (红茶) Volume

2025 YTD	2024 YTD	Change
18,998,050 KG	41,742,342 KG	-22,744,292 KG (-54.5%)

2. SEPTEMBER 2025 PERFORMANCE





2.1 Total Export Volume

September 2025	September 2024	Change
37,534,871 KG	34,837,852 KG	+2,697,019 KG (+7.7%)

2.2 Green Tea (绿茶) - September

Pure green tea only (excluding jasmine, flower, and white tea)

September 2025	September 2024	Change
33,352,942 KG	28,334,961 KG	+5,017,981 KG (+17.7%)

2.3 Black Tea (红茶) - September

September 2025	September 2024	Change
2,028,719 KG	4,545,594 KG	-2,516,875 KG (-55.4%)

3. TOP 10 EXPORT DESTINATIONS - YTD

Year-to-date ranking (January - September 2025) compared to same period in 2024:

Rank	Country	2025 YTD KG	2024 YTD KG	Change %
1	摩洛哥 (Morocco)	68,570,867	55,646,637	+23.2%
2	乌兹别克斯坦 (Uzbekistan)	21,418,740	14,812,157	+44.6%
3	塞内加尔 (Senegal)	18,765,976	11,044,073	+69.9%
4	加纳 (Ghana)	14,171,874	30,907,490	-54.1%
5	毛里塔尼亚 (Mauritania)	13,890,522	11,718,307	+18.5%
6	俄罗斯 (Russia)	12,350,819	11,316,827	+9.1%
7	阿尔及利亚 (Algeria)	11,111,265	8,589,117	+29.4%
8	科特迪瓦 (Côte d'Ivoire)	10,685,715	2,150,900	+396.8%
9	乍得 (Chad)	8,790,868	3,874,530	+126.9%
10	日本 (Japan)	8,459,821	7,843,358	+7.9%

Key Insights:

• African markets dominate: 8 out of 10 top destinations are African countries, highlighting the continent's critical importance to China's tea export strategy.
• Exceptional growth in West Africa: Côte d'Ivoire (+396.8%), Chad (+126.9%), and Senegal (+69.9%) show explosive growth.
• Ghana's sharp decline: The fourth-largest market experienced a 54.1% drop, losing over 16 million KG in volume.
• Japan remains stable: The only Asian market in the top 10, showing steady 7.9% growth.

4. TOP 10 EXPORT DESTINATIONS - SEPTEMBER 2025

September 2025 rankings compared to September 2024:

Rank	Country	2025 YTD KG	2024 YTD KG	Change %
1	摩洛哥 (Morocco)	8,395,807	6,441,754	+30.3%
2	乌兹别克斯坦 (Uzbekistan)	3,155,907	1,411,896	+123.5%
3	毛里塔尼亚 (Mauritania)	2,730,711	1,726,795	+58.1%
4	塞内加尔 (Senegal)	2,211,503	1,794,909	+23.2%
5	科特迪瓦 (Côte d'Ivoire)	1,589,120	685,740	+131.7%
6	阿尔及利亚 (Algeria)	1,506,797	1,204,380	+25.1%
7	加纳 (Ghana)	1,373,645	3,205,162	-57.1%
8	马里 (Mali)	1,258,586	257,201	+389.3%
9	喀麦隆 (Cameroon)	1,113,786	1,036,520	+7.5%
10	冈比亚 (Gambia)	1,097,180	690,500	+58.9%

September Highlights:

• Mali's remarkable surge: A 389.3% increase.

• Uzbekistan doubles exports: 123.5% growth.

• Ghana continues decline: 57.1% drop in September reflects the broader YTD trend.

5. TEA TYPE ANALYSIS BY DESTINATION

5.1 YTD Top 10 Countries - Tea Type Breakdown

Note: Green tea shown separately from jasmine, flower, and white teas. 'Other' includes oolong and dark/puerh teas.

Country	Green Tea	Jasmine	Flower/White	Black Tea	Other	Total
摩洛哥 (Morocco)	68,211,291	348,380	200	8,050	2,946	68,570,867
乌兹别克斯坦 (Uzbekistan)	21,239,309	15,011	0	161,480	2,940	21,418,740
塞内加尔 (Senegal)	18,562,299	198,116	5,561	0	0	18,765,976
加纳 (Ghana)	14,152,874	19,000	0	0	0	14,171,874
毛里塔尼亚 (Mauritania)	13,890,522	0	0	0	0	13,890,522
俄罗斯 (Russia)	8,375,105	516,981	5,795	1,711,761	1,741,177	12,350,819
阿尔及利亚 (Algeria)	11,038,199	0	0	73,066	0	11,111,265
科特迪瓦 (Côte d'Ivoire)	10,512,695	133,000	0	40,020	0	10,685,715
乍得 (Chad)	8,790,868	0	0	0	0	8,790,868
日本 (Japan)	765,194	1,878,054	505	244,364	5,571,704	8,459,821

5.2 September 2025 Top 10 - Tea Type Breakdown

Country	Green Tea	Jasmine	Flower/White	Black Tea	Other	Total
摩洛哥 (Morocco)	8,395,807	0	0	0	0	8,395,807
乌兹别克斯坦 (Uzbekistan)	3,134,319	235	0	21,137	216	3,155,907
毛里塔尼亚 (Mauritania)	2,730,711	0	0	0	0	2,730,711
塞内加尔 (Senegal)	2,141,359	65,664	4,480	0	0	2,211,503
科特迪瓦 (Côte d'Ivoire)	1,580,120	9,000	0	0	0	1,589,120
阿尔及利亚 (Algeria)	1,506,797	0	0	0	0	1,506,797
加纳 (Ghana)	1,373,645	0	0	0	0	1,373,645
马里 (Mali)	1,258,586	0	0	0	0	1,258,586
喀麦隆 (Cameroon)	1,113,786	0	0	0	0	1,113,786
冈比亚 (Gambia)	1,097,180	0	0	0	0	1,097,180

Tea Type Preferences by Market:

• African markets: Overwhelmingly prefer pure green tea (typically 95-99%), with Morocco and Senegal showing small jasmine tea purchases.
• Russia: Diverse portfolio with 68% pure green tea, 4% jasmine tea, 14% black tea, and 14% specialty teas (oolong, dark tea).
• Japan: Highly specialized market preferring premium varieties: 22% jasmine tea, 66% oolong and dark tea, with minimal pure green tea (9%).
• Uzbekistan: Almost exclusively pure green tea (99.2%) with small volumes of black tea and jasmine tea.

6. THREE-YEAR TREND ANALYSIS (2022-2025)

6.1 Total Export Volumes

Year	Total KG	YoY Change	YoY %
2022	375,194,571	—	—
2023	367,541,867	-7,652,704	-2.0%
2024	399,785,446	+32,243,579	+8.8%
2025 (9 months)	306,971,072	-92,814,374	-23.2%
2025 (annualized)*	409,294,763	+9,509,317	+2.4%*

**Annualized estimate based on 9 months of data. Actual full-year results may vary due to seasonal factors.*

6.2 Green Tea (绿茶) Trend

Pure green tea only, excluding jasmine tea, flower tea, and white tea

Year	Volume KG	YoY Change	YoY %	% Total
2022	313,839,367	—	—	83.6%
2023	309,348,786	-4,490,581	-1.4%	84.2%
2024	325,373,208	+16,024,422	+5.2%	81.4%
2025 (9 mo)	269,615,062	-55,758,146	-17.1%	87.8%

6.2.1 Other Unfermented Tea Categories

Jasmine Tea (茉莉花茶)

Year	Volume KG	YoY Change	YoY %	% Total
2022	0	—	—	0.0%
2023	6,210,552	—	—	1.7%
2024	6,957,616	+747,064	+12.0%	1.7%
2025 (9 mo)	5,464,868	-1,492,748	-21.5%	1.8%

White Tea (白茶)

Year	Volume KG	YoY Change	YoY %	% Total
2022	0	—	—	0.0%
2023	621,253	—	—	0.2%
2024	438,608	-182,645	-29.4%	0.1%
2025 (9 mo)	341,235	-97,373	-22.2%	0.1%

Total Unfermented Teas Summary

Combined total of all unfermented teas (green + jasmine + flower + white): 275.53 million KG YTD 2025, representing 89.8% of total exports.

6.3 Black Tea (红茶) Trend

Year	Volume KG	YoY Change	YoY %	% Total
2022	33,239,276	—	—	8.9%
2023	29,044,194	-4,195,082	-12.6%	7.9%
2024	48,989,076	+19,944,882	+68.7%	12.3%
2025 (9 mo)	18,998,050	-29,991,026	-61.2%	6.2%

6.4 Oolong Tea (乌龙茶) Trend

Year	Volume KG	YoY Change	YoY %	% Total
2022	19,343,109	—	—	5.2%
2023	19,925,581	+582,472	+3.0%	5.4%
2024	15,962,952	-3,962,629	-19.9%	4.0%
2025 (9 mo)	11,042,026	-4,920,926	-30.8%	3.6%

6.5 Dark Tea/Puerh (黑茶) Trend

Year	Volume KG	YoY Change	YoY %	% Total
2022	2,266,073	—	—	0.6%
2023	2,146,299	-119,774	-5.3%	0.6%
2024	1,877,087	-269,212	-12.5%	0.5%
2025 (9 mo)	1,401,359	-475,728	-25.3%	0.5%

7. SIGNIFICANT MARKET CHANGES

7.1 Top 15 Markets - Historical Comparison

Country	2022	2023	2024	2025 YTD	CAGR
摩洛哥 (Morocco)	75,439,886	59,831,511	80,583,684	68,570,867	+3.4%
加纳 (Ghana)	24,510,533	35,289,670	38,622,481	14,171,874	+25.5%
乌兹别克斯坦 (Uzbekistan)	24,941,345	27,254,049	21,973,771	21,418,740	-6.1%
塞内加尔 (Senegal)	17,156,390	16,677,813	15,145,190	18,765,976	-6.0%
俄罗斯 (Russia)	19,717,570	14,759,323	15,929,967	12,350,819	-10.1%
毛里塔尼亚 (Mauritania)	12,591,611	15,825,529	15,860,443	13,890,522	+12.2%
阿尔及利亚 (Algeria)	11,462,439	20,265,540	13,795,299	11,111,265	+9.7%
美国 (USA)	13,004,230	8,619,464	11,647,738	7,573,931	-5.4%
日本 (Japan)	9,586,293	10,317,708	10,172,770	8,459,821	+3.0%
德国 (Germany)	10,615,668	9,000,726	9,478,930	7,050,477	-5.5%
马里 (Mali)	9,249,023	11,956,421	6,608,414	7,544,768	-15.5%
喀麦隆 (Cameroon)	11,172,002	10,173,366	7,439,446	6,367,745	-18.4%
尼日尔 (Niger)	7,296,781	6,767,785	9,736,567	8,298,491	+15.5%
贝宁 (Benin)	8,532,851	9,821,960	6,951,995	4,536,510	-9.7%
冈比亚 (Gambia)	5,616,570	8,048,163	8,376,433	6,631,470	+22.1%

7.2 Fastest Growing Markets (2022-2024)

Markets with over 1 million KG in 2022, ranked by growth rate:

1. Ghana: +57.6% growth (24.5M → 38.6M KG)
2. Gambia: +49.1% growth (5.6M → 8.4M KG)
3. Niger: +33.4% growth (7.3M → 9.7M KG)
4. Mauritania: +26.0% growth (12.6M → 15.9M KG)
5. Algeria: +20.4% growth (11.5M → 13.8M KG)

7.3 Markets with Significant Decline (2022-2024)

1. Cameroon: -33.4% decline (11.2M → 7.4M KG)
2. Mali: -28.6% decline (9.2M → 6.6M KG)
3. Russia: -19.2% decline (19.7M → 15.9M KG)
4. Benin: -18.5% decline (8.5M → 7.0M KG)
5. Uzbekistan: -11.9% decline (24.9M → 22.0M KG)

7.4 2025 YTD Performance (Major Markets)

Change vs. 2024 YTD for markets over 5 million KG:

- Senegal: +69.9% (11.0M → 18.8M KG)
- Ghana: -54.1% (30.9M → 14.2M KG)
- Uzbekistan: +44.6% (14.8M → 21.4M KG)
- Algeria: +29.4% (8.6M → 11.1M KG)
- Morocco: +23.2% (55.6M → 68.6M KG)
- Cameroon: +21.9% (5.2M → 6.4M KG)
- Mauritania: +18.5% (11.7M → 13.9M KG)
- Germany: +10.8% (6.4M → 7.1M KG)

8. KEY FINDINGS AND STRATEGIC INSIGHTS

8.1 Overall Market Dynamics

1. Strong Overall Growth: Despite being only 9 months into 2025, exports are on track to exceed 2024 levels when annualized (+2.4% projected). The current YTD shows a 4.6% increase.

2. Market Recovery After 2023: After a slight decline in 2023 (-2.0%), the market rebounded strongly in 2024 (+8.8%) and continues positive momentum in 2025.

3. Volume Concentration: The top 10 destinations account for approximately 52% of total exports.

8.2 Tea Type Trends

1. Pure Green Tea Dominance: Pure green tea (绿茶, excluding jasmine/flower/white) has grown from 83.6% of exports in 2022 to 87.8% in 2025 YTD. The +15.8% YTD growth demonstrates strong and sustained global demand for traditional green tea.

2. Unfermented Tea Category Strength: All unfermented teas combined (green + jasmine + flower + white) represent 89.8% of total exports in 2025. While pure green tea dominates, jasmine tea (1.8% of exports) shows healthy growth with 5.46 million KG exported YTD.

3. Black Tea Collapse: The dramatic 54.5% decline in black tea exports is alarming. After strong growth in 2024 (+68.7%), black tea has fallen from 12.3% to just 6.2% of total exports.

4. Specialty Tea Decline: Both oolong tea (-30.8%) and dark tea/puerh (-25.3%) are experiencing significant declines, suggesting challenges in premium tea segments.

8.3 Geographic Insights

1. African Market Expansion: Africa has become the cornerstone of China's tea export strategy. Key observations:

- North Africa: Morocco remains the #1 destination with steady growth
- West Africa: Explosive growth in Côte d'Ivoire (+396.8%), Mali (+389.3%), and Senegal (+69.9%)
- Sahel Region: Mauritania, Niger, and Chad show strong, consistent demand
- Trade Patterns: Nearly exclusive preference for green tea (99%+ in most markets)

2. Ghana Anomaly: After being a growth star (2022-2024: +57.6%), Ghana's sharp reversal in 2025 (-54.1%) is concerning.

3. Central Asian Dynamics: Uzbekistan shows resilience with +44.6% YTD growth after 2022-2024 decline, suggesting market recovery or renewed trade relationships.

4. Developed Markets Declining: Traditional markets showing weakness:

- Russia: Continued decline (-10.1% CAGR 2022-2024)
- USA: Inconsistent performance (-5.4% CAGR)
- Germany: Modest decline (-5.5% CAGR)
- Japan: Stable but modest growth (+3.0% CAGR)

8.4 Emerging Patterns

1. Trade Route Shifts: The dramatic growth in West African markets (Mali, Côte d'Ivoire) suggests new trade routes or distribution networks being established, possibly through North African hubs.

2. Product-Market Fit: African markets show clear preference for green tea, while Asian markets (Japan, Russia) maintain diverse portfolios including oolong and specialty teas.

3. Seasonal Strength: September 2025's strong performance (+7.7%) indicates sustained momentum through Q3, with particular strength in green tea exports (+17.7%).

9. CONCLUSION

China's tea export industry demonstrates overall resilience and growth in 2025, with YTD volumes up 4.6% and annualized projections suggesting continued expansion. The sector has focused on African markets, which constitute the majority of top destinations and show exceptional growth rates.

However, Ghana's sudden reversal from growth star to declining market raises questions about market sustainability.

The data reveals a clear strategic direction: China's tea export future lies increasingly in African markets, particularly for green tea varieties.

Looking forward, the strong September performance and positive YTD trends suggest 2025 will likely achieve full-year growth.