

# China Tea Export Analysis Report

October 2025

Report Date: December 04, 2025

## EXECUTIVE SUMMARY

Overall Performance: China's tea exports for the first ten months of 2025 totaled 343.61 million KG, representing a **3.8% increase** compared to the same period in 2024 (330.88 million KG).

Key Highlights:

- Pure green tea (绿茶) exports grew by **13.5%**, reaching 301.71 million KG
- Total unfermented teas represent **89.8% of exports**, totaling 308.46 million KG
- Black tea (红茶) exports **decreased 51.1%**, falling to 21.72 million KG
- October 2025 showed **-2.3% decline** vs October 2024
- Morocco remains #1 destination with **78.71 million KG YTD (+20.4%)**
- African markets dominate top 10, representing majority of exports
- Ghana continued sharp decline: **-54.8% YTD**
- Côte d'Ivoire explosive growth: **+324.2% YTD**

## 1. YEAR-TO-DATE PERFORMANCE (JAN-OCT 2025)

### 1.1 Total Export Volume

2025 YTD (Jan-Oct)	2024 YTD (Jan-Oct)	Change
343,605,194 KG	330,876,413 KG	+12,728,781 KG (+3.8%)

## 1.2 Green Tea (绿茶) Volume

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

2025 YTD	2024 YTD	Change
301,713,836 KG	265,921,638 KG	+35,792,198 KG (+13.5%)

### 1.2.1 Other Unfermented Tea Categories

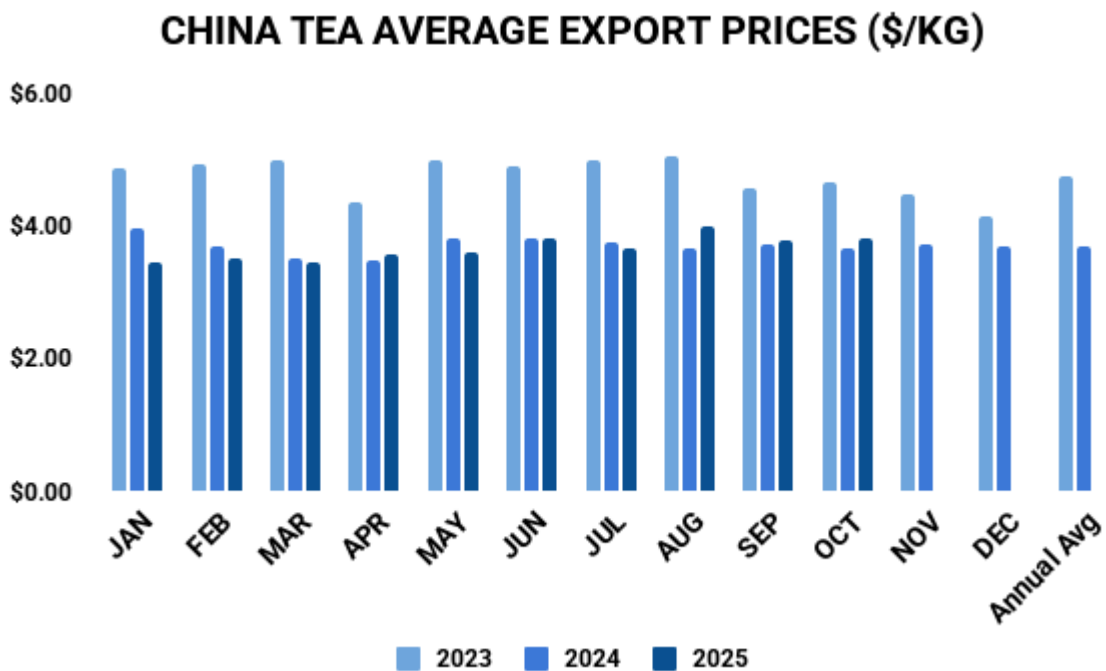
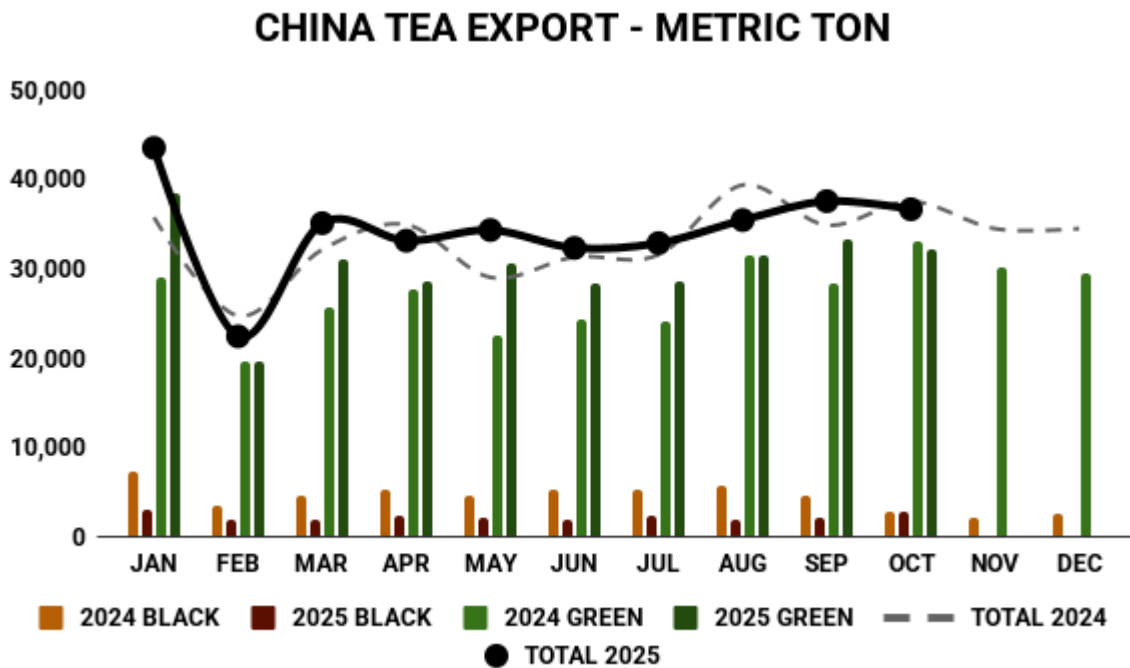
In addition to pure green tea, the following unfermented tea categories contributed to total exports:

- Jasmine Tea (茉莉花茶): 5,779,859 KG (+13.4% vs 2024 YTD)
- White Tea (白茶): 357,076 KG (+0.7% vs 2024 YTD)
- Other Flower Tea (其他花茶): 607,800 KG (-42.7% vs 2024 YTD)
- Total All Unfermented Teas: 308,458,571 KG (representing 89.8% of total exports)

## 1.3 Black Tea (红茶) Volume

2025 YTD	2024 YTD	Change
21,724,914 KG	44,383,708 KG	-22,658,794 KG (-51.1%)

## 2. OCTOBER 2025 PERFORMANCE



## 2.1 Total Export Volume

October 2025	October 2024	Change
36,634,122 KG	37,505,895 KG	-871,773 KG (-2.3%)

## 2.2 Green Tea (绿茶) - October

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

October 2025	October 2024	Change
32,098,774 KG	33,080,043 KG	-981,269 KG (-3.0%)

## 2.3 Black Tea (红茶) - October

October 2025	October 2024	Change
2,726,864 KG	2,641,366 KG	+85,498 KG (+3.2%)

### 3. TOP 10 DESTINATIONS - YTD

Rank	Country	2025 KG	2024 KG	Change %
1	摩洛哥 (Morocco)	78,711,450	65,369,431	+20.4%
2	乌兹别克斯坦 (Uzbekistan)	24,655,916	17,166,037	+43.6%
3	塞内加尔 (Senegal)	20,418,052	12,411,544	+64.5%
4	毛里塔尼亚 (Mauritania)	15,680,864	13,829,838	+13.4%
5	加纳 (Ghana)	15,079,246	33,360,202	-54.8%
6	俄罗斯 (Russia)	13,258,143	12,253,239	+8.2%
7	科特迪瓦 (Côte d'Ivoire)	13,016,779	3,068,280	+324.2%
8	阿尔及利亚 (Algeria)	12,422,686	10,176,179	+22.1%
9	乍得 (Chad)	9,707,354	4,465,793	+117.4%
10	日本 (Japan)	9,382,236	8,601,903	+9.1%

#### Key Insights:

- 8 of top 10 destinations are African countries, dominating China's tea export landscape
- Côte d'Ivoire shows explosive growth (+324.2%)
- Senegal demonstrates strong growth trajectory (+64.5%)
- Ghana's dramatic reversal: from growth star (2022-2024) to sharp decline (-54.8%)
- Uzbekistan recovery momentum (+43.6% after 2022-2024 decline)

#### 4. TOP 10 DESTINATIONS - OCTOBER 2025

Rank	Country	2025 KG	2024 KG	Change %
1	摩洛哥 (Morocco)	10,140,583	9,722,794	+4.3%
2	乌兹别克斯坦 (Uzbekistan)	3,237,176	2,353,880	+37.5%
3	科特迪瓦 (Côte d'Ivoire)	2,331,064	917,380	+154.1%
4	毛里塔尼亚 (Mauritania)	1,790,342	2,111,531	-15.2%
5	塞内加尔 (Senegal)	1,652,076	1,367,471	+20.8%
6	阿尔及利亚 (Algeria)	1,311,421	1,587,062	-17.4%
7	美国 (USA)	1,282,442	948,162	+35.3%
8	德国 (Germany)	954,559	1,182,462	-19.3%
9	日本 (Japan)	922,415	758,545	+21.6%
10	乍得 (Chad)	916,486	591,263	+55.0%

##### October Highlights:

- Côte d'Ivoire maintained explosive growth momentum (+154.1%)
- USA demonstrated strong recovery (+35.3%), re-entering top 10
- Uzbekistan consistent strong performer (+37.5%)
- Mauritania, Algeria, and Germany showed October weakness

## 5. TEA TYPE ANALYSIS BY DESTINATION

### 5.1 YTD Top 10 Countries - Tea Type Breakdown

Country	Green Tea KG	Black Tea KG	Other Types KG
摩洛哥 (Morocco)	78,285,634	8,050	417,766
乌兹别克斯坦 (Uzbekistan)	24,472,186	164,160	19,570
塞内加尔 (Senegal)	20,161,295	0	256,757
毛里塔尼亚 (Mauritania)	15,680,864	0	0
加纳 (Ghana)	15,045,574	72	33,600
俄罗斯 (Russia)	8,984,175	1,914,936	2,359,032
科特迪瓦 (Côte d'Ivoire)	12,811,359	40,020	165,400
阿尔及利亚 (Algeria)	12,349,620	73,066	0
乍得 (Chad)	9,707,354	0	0
日本 (Japan)	1,004,996	255,813	8,121,427

## 5.2 October 2025 Top 10 - Tea Type Breakdown

Country	Green Tea KG	Black Tea KG	Other Types KG
摩洛哥 (Morocco)	10,074,343	0	66,240
乌兹别克斯坦 (Uzbekistan)	3,232,877	2,680	1,619
科特迪瓦 (Côte d'Ivoire)	2,298,664	0	32,400
毛里塔尼亚 (Mauritania)	1,790,342	0	0
塞内加尔 (Senegal)	1,598,996	0	53,080
阿尔及利亚 (Algeria)	1,311,421	0	0
美国 (USA)	587,916	577,965	116,561
德国 (Germany)	622,682	238,328	93,549
日本 (Japan)	239,802	11,449	671,164
乍得 (Chad)	916,486	0	0

### Tea Type Preferences by Market:

- African markets: Overwhelmingly prefer pure green tea (95-100%), with minimal diversification
- Morocco: 99.5% green tea - largest single market
- Russia: Diverse portfolio (68% green, 14% black, 18% specialty teas)
- Japan: Preference for specialty teas (73% oolong/dark, 27% green/black)
- USA: Balanced mix (46% green, 45% black, 9% other)
- Germany: Mixed portfolio (65% green, 25% black, 10% other)

## 6. THREE-YEAR TREND ANALYSIS

### Total Export Volumes

- 2022: 375.19M KG (baseline)
- 2023: 367.54M KG (-2.0% vs 2022)
- 2024: 399.79M KG (+8.8% vs 2023)



- 2025 YTD: 343.61M KG (10 months)
- 2025 Annualized: 412.33M KG (+3.1% projected)

#### Green Tea (绿茶) Trend

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

- 2022: 313.84M KG (83.6% of total)
- 2023: 309.35M KG (-1.4%, 84.2% of total)
- 2024: 325.37M KG (+5.2%, 81.4% of total)
- 2025 YTD: 301.71M KG (87.8% of total)

#### Black Tea (红茶) Trend

- 2022: 33.24M KG (8.9% of total)
- 2023: 29.04M KG (-12.6%, 7.9% of total)
- 2024: 48.99M KG (+68.7%, 12.3% of total) ← Strong growth
- 2025 YTD: 21.72M KG (-55.7%, 6.3% of total) ← COLLAPSE

#### Key Trend Observations

1. Green tea dominance intensifying: Rising from 81.4% (2024) to 87.8% (2025 YTD)
2. Black tea dramatic reversal: After +68.7% growth in 2024, collapsed -55.7% in 2025
3. Unfermented teas historic high: 89.8% of total (green + jasmine + flower + white)
4. Specialty teas declining: Oolong (-25.7% YTD), Dark tea/Puerh also declining

## 7. KEY FINDINGS & STRATEGIC INSIGHTS

### 7.1 DECLINES

#### 1. GHANA MARKET DECREASE

- -54.8% YTD after being fastest grower (2022-2024: +57.6%)
- Lost 18.3 million KG, dropped from #2 to #5

## 2. OCTOBER NEGATIVE MOMENTUM

- First month with negative growth (-2.3%)
- Suggests Q4 challenges ahead, could impact full-year performance

## 7.2 GAINS

### 1. WEST AFRICAN EXPANSION

- Côte d'Ivoire: +324.2% YTD (3.1M → 13.0M KG) - Exceptional growth
- Chad: +117.4% YTD (4.5M → 9.7M KG)
- Senegal: +64.5% YTD (12.4M → 20.4M KG)

### 2. UZBEKISTAN RECOVERY

- +43.6% YTD after 2-year decline, back to #2 position

### 3. MOROCCO STABILITY

- Consistent #1 destination with +20.4% YTD growth
- 78.7M KG (22.9% of total exports), reliable and growing

### 4. DEVELOPED MARKETS REVIVAL

- USA: +35.3% in October, Japan: +21.6% in October

*\*This report was produced with the assistance of an AI agent. It was reviewed by Firsd Tea, but it is for informational purposes.*