

US Tea Import Analysis — January 2026

Source: GATS HS 0902 Monthly Import Data

Analytical Note on Baseline Comparisons

January 2025 was a significant front-loading month across virtually all US tea import categories — both world totals and China-origin imports — as importers accelerated purchases ahead of anticipated tariff changes. China's January 2025 total of 1,774.8 MT was 74.3% above January 2024 (1,018.0 MT) and represented 15.5% of China's full-year 2025 total, nearly double the expected monthly proportion (~8.3%). Every year-over-year comparison in this report is therefore measured against an elevated baseline. Throughout this report, January 2024 figures are provided as a normalized reference benchmark where applicable. Tables with a highlighted column indicate the normalized Jan 2024 comparator.

1. Total World Imports — Year to Date vs. Prior YTD

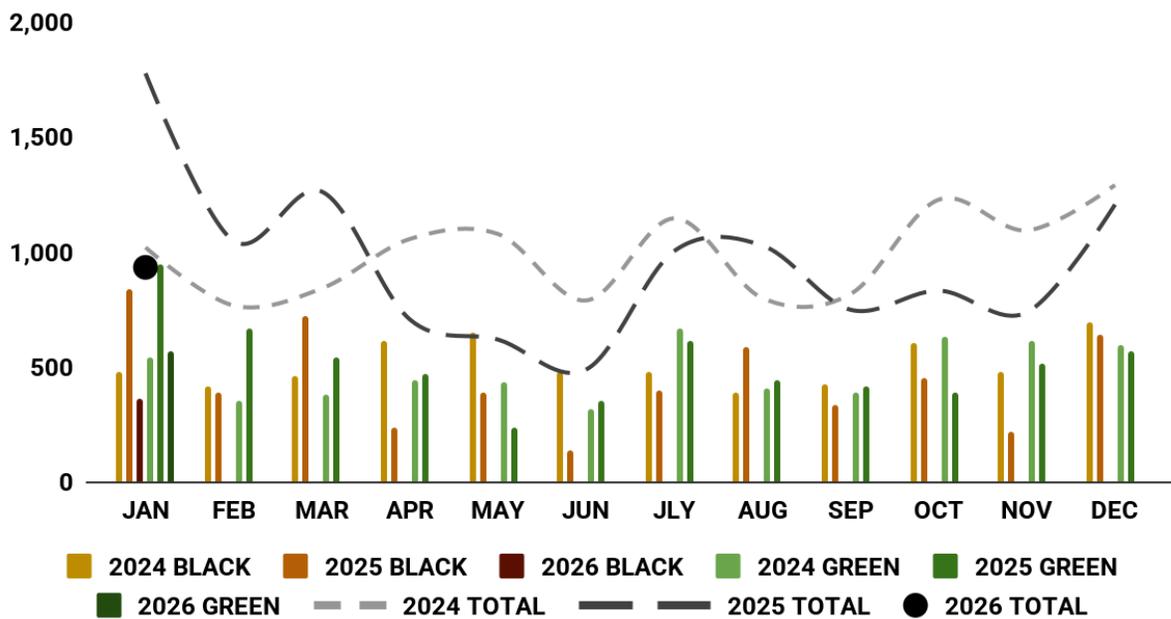
Metric	Jan 2026 (YTD)	Jan 2025 (YTD)	Jan 2024 (normalized)	YoY Chg vs. 2025	Chg vs. 2024
World Total Volume (MT)	9,301.9	10,439.2	8,380.4	-10.9%	+11.0%
World Total Value (USD)	\$53,374K	\$49,736K	\$43,358K	+7.3%	+23.1%
Avg. Import Price (\$/kg)	\$5.74	\$4.76	\$5.40	+20.6%	+6.3%

Total US tea imports in January 2026 reached 9,301.9 MT. Against January 2025's front-loaded 10,439.2 MT, this appears as a 10.9% decline. Against the more representative January 2024 figure of 8,380.4 MT, January 2026 is actually 11.0% higher, suggesting that underlying market demand remains healthy. Import values rose 7.3% YoY and 23.1% relative to January 2024, driven

primarily by price inflation: the average import price rose to \$5.74/kg from \$4.76/kg (Jan 2025) and \$5.40/kg (Jan 2024).

2. Current Month Total China Imports vs. Same Month Prior Year

US TEA IMPORTS (HS 0902) FROM CHINA, METRIC TONS



Metric	Jan 2026	Jan 2025 (front-loaded)	Jan 2024 (normalized)	YoY vs. 2025	vs. 2024
China Total Volume (MT)	931.1	1,774.8	1,018.0	-47.5%	-8.5%
China Total Value (USD)	\$4,929K	\$6,877K	\$5,494K	-28.3%	-10.3%
China Avg. Price (\$/kg)	\$5.29	\$3.87	\$5.40	+36.7%	-2.0%
China Share of World Volume	10.0%	17.0%	12.1%	-7.0 pp	-2.1 pp

China's total January 2026 imports of 931.1 MT appear to decline 47.5% against the front-loaded January 2025 figure of 1,774.8 MT. However, compared to the normalized January 2024 baseline of 1,018.0 MT, the decline narrows substantially to 8.5% – a meaningful but far more moderate contraction. The same pattern applies to value: an apparent 28.3% YoY decline reduces to 10.3% on a normalized basis.

China's market share also reads differently once base effects are accounted for. The January 2025 share of 17.0% was itself anomalous – inflated by front-loading – compared to January 2024's 12.1%. January 2026's 10.0% share therefore represents a more modest 2.1 percentage point decline from normalized levels, not the 7.0 pp headline figure. The sharp rise in average price (\$5.29/kg vs. \$3.87/kg in January 2025) also reflects compositional normalization: the January 2025 front-loading was concentrated in lower-value bulk grades, which depressed the average price in that month.

3. China Green Tea – Year to Date vs. Prior YTD

Metric	Jan 2026 (YTD)	Jan 2025 (front-loaded)	Jan 2024 (normalized)	YoY vs. 2025	vs. 2024
China Green Tea Volume (MT)	569.2	942.9	537.4	-39.6%	+5.9%
China Green Tea Value (USD)	\$3,512K	\$4,307K	\$3,515K	-18.5%	-0.1%
China Green Avg. Price (\$/kg)	\$6.17	\$4.57	\$6.54	+35.0%	-5.7%

China green tea imports of 569.2 MT in January 2026 represent a headline YoY decline of 39.6% against January 2025's front-loaded 942.9 MT. However, this comparison substantially misrepresents the underlying trend. Against January 2024's 537.4 MT – a normal month – January 2026 is actually 5.9% higher. Import values are nearly flat versus 2024 (-0.1%), and the average price of \$6.17/kg is consistent with the January 2024 level of \$6.54/kg. The January 2025 price anomaly (\$4.57/kg) reflects the bulk, lower-value composition of front-loaded orders.

On a normalized basis, China green tea shows modest year-on-year volume growth of +5.9% and stable value, with no evidence of meaningful structural contraction.

4. China Green Tea YTD as a Percent of World Total Green Tea YTD

Metric	Jan 2026 (YTD)	Jan 2025 (front-loaded)	Jan 2024 (normalized)
China Green Tea (MT)	569.2	942.9	537.4
World Total Green Tea (MT)	1,586.4	2,013.0	1,530.1
China Share of World Green	35.9%	46.8%	35.1%

The headline comparison of China's green tea share – 46.8% in January 2025 versus 35.9% in January 2026 – suggests a dramatic 10.9 percentage point loss of market share. In reality, China's January 2024 share was 35.1%, virtually identical to January 2026's 35.9%. The 46.8% figure in January 2025 was itself an artifact of front-loading, during which Chinese green tea was imported at disproportionately high volumes.

This is a critical reframing: rather than a sudden structural collapse in China's green tea market share, the data indicate that China's share has remained broadly stable at approximately 35–36% of US green tea imports on a normalized basis. Both China green tea volume and world green tea volume were elevated in January 2025 by front-loading, but China's volumes were proportionally more elevated, creating the false impression of a subsequent share collapse.

Normalized comparison (Jan 2026 vs. Jan 2024): China's share of world green tea is essentially unchanged at 35.9% vs. 35.1% – a gain of 0.8 pp, not a loss of 10.9 pp.

5. Current Month China Green Tea vs. Same Month Prior Year

HS Category	Jan 2026 MT	Jan 2025 MT	Jan 2024 MT	vs. 2025	vs. 2024
GR TEA NF OT (902209050)	298.2	681.8	333.3	-383.6	-35.1
ORG GR TEA NF OT (902209015)	86.9	80.9	53.9	+6.0	+33.0
FLAV GRN TEA NRT (902201000)	12.2	2.5	0.2	+9.7	+12.0
GR TEA NF<3K (902109050)	57.9	64.7	70.6	-6.8	-12.7
ORG GR TEA NF<3K (902109015)	88.8	80.7	53.5	+8.1	+35.3
GR TEA FL<3K (902101050)	21.4	24.2	20.7	-2.8	+0.7
ORG GR TEA FL<3K (902101015)	3.8	8.1	5.2	-4.3	-1.4
TOTAL CHINA GREEN	569.2	942.9	537.4	-373.7	+31.8

The HS-level breakdown makes the front-loading distortion vivid. Against January 2025, the large non-fermented green tea category (HS 902209050) fell 383.6 MT – by far the largest driver of the apparent decline. But against January 2024, that same category is only 35.1 MT lower (-10.5%), a far less alarming picture. The total China green tea figure of 569.2 MT is 31.8 MT above January 2024's 537.4 MT when the base effect is removed.

The organic sub-categories (ORG GR TEA NF OT and ORG GR TEA NF<3K) show strong growth on both comparators: +6.0 MT and +8.1 MT versus January 2025 respectively, and +33.0 MT and +35.3 MT versus January 2024. Flavored green tea (HS 902201000) has grown from a negligible 0.2 MT in January 2024 to 12.2 MT in January 2026, representing an emerging trend toward flavored specialty formats.

6. China Black Tea – Year to Date vs. Prior YTD

Metric	Jan 2026 (YTD)	Jan 2025 (front-loaded)	Jan 2024 (normalized)	YoY vs. 2025	vs. 2024
China Black Tea Volume (MT)	361.9	831.9	480.6	-56.5%	-24.7%
China Black Tea Value (USD)	\$1,417K	\$2,570K	\$1,979K	-44.9%	-28.4%
China Black Avg. Price (\$/kg)	\$3.91	\$3.09	\$4.12	+26.5%	-5.1%
China Black Share of World Black	4.7%	9.9%	7.0%	-5.2 pp	-2.3 pp

China black tea is the one category where front-loading provides only partial mitigation of the apparent decline. Against the elevated January 2025 figure of 831.9 MT, the decline appears as -56.5%. Against the more representative January 2024 baseline of 480.6 MT, January 2026's 361.9 MT still represents a 24.7% decline – more moderate, but genuinely significant. This suggests that beyond the base effect, there is a real structural softening in China black tea imports.

The market share picture adjusts similarly: China's 9.9% share in January 2025 was front-loading inflated. Compared to January 2024's 7.0%, the January 2026 figure of 4.7% represents a 2.3 pp structural decline, not 5.2 pp. The average price of \$3.91/kg in January 2026 is below January 2024's \$4.12/kg, consistent with the shift away from fermented black bulk grades toward lower-weight specialty formats noted in Section 7.

Normalized assessment: China black tea shows a genuine structural decline of approximately 25% versus 2024 levels, distinct from the front-loading distortion seen in other categories. This warrants continued monitoring.

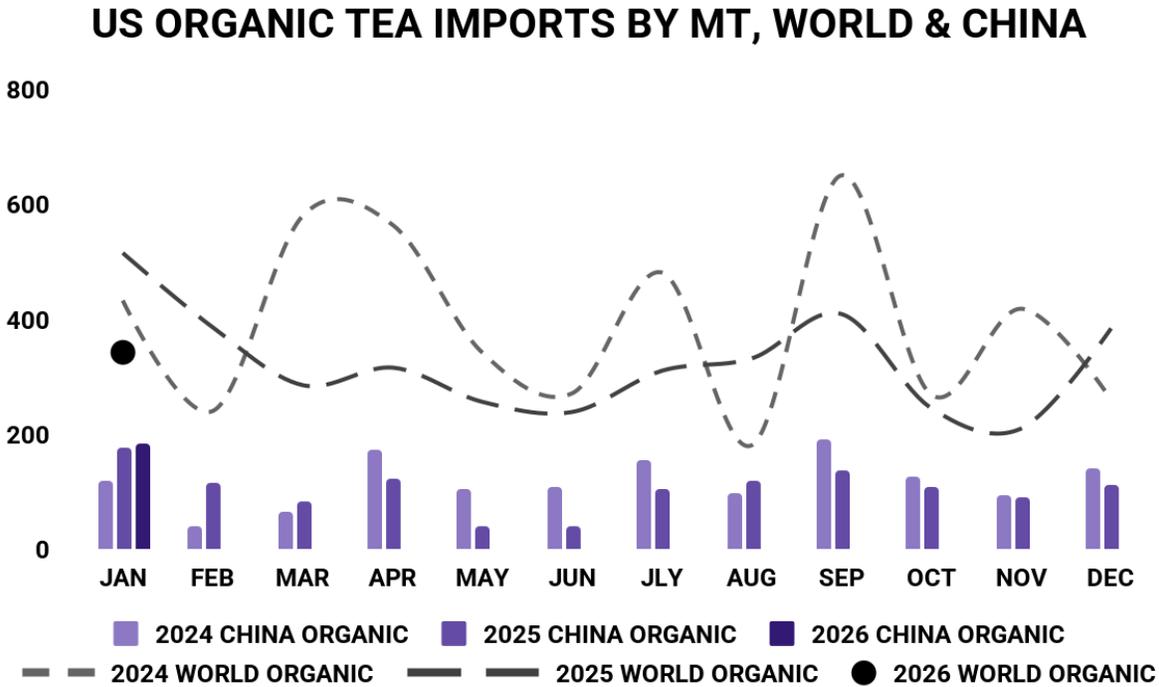
7. Current Month China Black Tea vs. Same Month Prior Year

HS Category	Jan 2026 MT	Jan 2025 MT	Jan 2024 MT	vs. 2025	vs. 2024
BLACK TEA FERMDT (902400000)	276.6	713.2	336.8	-436.6	-60.2
BLACK TEA, OTHER (902300090)	66.4	106.3	113.8	-39.9	-47.4
BL TEA F/BAG (902300050)	15.0	6.8	25.5	+8.2	-10.5
ORG BL TEA F/BAG (902300015)	3.9	5.6	4.5	-1.7	-0.6
TOTAL CHINA BLACK	361.9	831.9	480.6	-470.0	-118.7

The fermented black tea category (HS 902400000) represents the most significant and most persistent decline. Against January 2025's highly elevated 713.2 MT, January 2026 falls 436.6 MT. But crucially, even against the normalized January 2024 baseline of 336.8 MT, the January 2026 figure of 276.6 MT still represents a 60.2 MT shortfall (-17.9%). This is a structural shift, not merely a base-effect artifact.

The "Other Black Tea" category (HS 902300090) likewise shows real declines versus both years: down 39.9 MT from January 2025 and down 47.4 MT from January 2024. Tea bags (HS 902300050) are the exception, showing moderate improvement versus both baselines when front-loading is stripped out. The overall picture for China black tea is one of genuine underlying contraction, with front-loading accounting for roughly half the apparent YoY decline.

8. Current Month China Organic Imports vs. Same Month Prior Year



Metric	Jan 2026	Jan 2025	Jan 2024 (normalized)	YoY vs. 2025	vs. 2024
China Organic Volume (MT)	183.4	175.3	117.1	+4.6%	+56.6%
China Organic Value (USD)	\$1,178K	\$1,214K	\$—	-3.0%	—
China Organic Avg. Price (\$/kg)	\$6.42	\$6.93	—	-7.4%	—
China Organic Share of World Organic	53.6%	34.0%	27.0%	+19.6 pp	+26.6 pp

China organic is the one category where front-loading context actually strengthens the positive story. Unlike conventional categories, China organic imports were not dramatically front-loaded: January 2025's 175.3 MT was a 49.7% increase over January 2024's 117.1 MT, a substantial but multi-year trend-driven gain rather than a one-time tariff surge. January 2026's 183.4 MT

therefore represents genuine incremental growth both versus the front-loaded January 2025 (+4.6%) and more impressively versus the normalized January 2024 (+56.6%).

China's share of world organic tea imports surged from 34.0% in January 2025 to 53.6% in January 2026. Unlike conventional categories, this comparison is not significantly distorted by front-loading: world organic imports fell from 515.1 MT in January 2025 to 342.1 MT in January 2026, while China organic held firm. The January 2024 world organic total was 433.2 MT (China: 117.1 MT, share: 27.0%). The January 2026 world organic total of 342.1 MT is 21.1% below the 2024 level, suggesting genuine supply-side contraction from non-China organic origins.

China organic is demonstrating genuine structural growth, not front-loading-driven volatility. Both the YoY and normalized comparisons confirm a strong multi-year upward trend.

9. China Organic Tea – Year to Date vs. Prior YTD

Metric	Jan 2026 (YTD)	Jan 2025 (YTD)	Jan 2024 (YTD)	Jan 2023 (YTD)	3-Yr CAGR
China Organic (MT)	183.4	175.3	117.1	79.1	+32.4%
World Organic (MT)	342.1	515.1	433.2	147.0	+32.5%
All Other Origins (MT)	158.7	339.8	316.1	67.9	+32.6%

The YTD China organic figure mirrors the current month as January is the first reporting month of the year. The three-year compound annual growth rate (CAGR) for China organic tea stands at +32.4% per January period, demonstrating sustained and accelerating momentum entirely independent of the front-loading phenomenon seen in conventional categories. January 2025's 175.3 MT was a continuation of this genuine growth trend, not primarily a front-loading effect, and January 2026's 183.4 MT extends it further.

The world organic market was somewhat elevated in January 2025 (515.1 MT) relative to January 2024 (433.2 MT). A portion of this gain may reflect front-loading by non-China organic suppliers, which would partially explain why non-China organic volumes collapsed in January 2026 (from

339.8 MT to 158.7 MT). However, even relative to January 2024 (316.1 MT other origins), the January 2026 figure of 158.7 MT represents a genuine 49.8% decline from non-China organic supply, suggesting real supply-side pressures beyond base effects.

10. China Organic Tea YTD as a Percent of World Organic

YTD Total

Metric	Jan 2026 (YTD)	Jan 2025 (YTD)	Jan 2024 (norm.)	Jan 2023 (YTD)
China Organic (MT)	183.4	175.3	117.1	79.1
World Organic (MT)	342.1	515.1	433.2	147.0
China % of World Organic	53.6%	34.0%	27.0%	53.8%
Non-China Organic (MT)	158.7	339.8	316.1	67.9

China's share of world organic tea imports rose from 34.0% (January 2025) to 53.6% (January 2026). This comparison is less distorted by front-loading than conventional tea comparisons because organic categories were not front-loaded to the same degree. However, the January 2025 world organic figure of 515.1 MT was elevated by both China's genuine growth and potentially some non-China front-loading. Relative to January 2024's world organic total of 433.2 MT – where China held a 27.0% share – China's January 2026 share of 53.6% represents a genuine structural shift of 26.6 percentage points over two years.

This extraordinary share increase is driven by two simultaneous forces: China organic growing strongly (+56.6% vs. January 2024) while non-China organic has contracted sharply (-49.8% vs. January 2024). Whether the non-China contraction is driven by supply disruption, sourcing shift, or the lagged effects of front-loading on subsequent demand is a key question for monitoring through Q2 2026.

11. Noteworthy Trends and Changes – Past 24 Months

11.1 The January 2025 Front-Loading Anomaly: Scope and Scale

The single most important analytical context for interpreting all January 2026 data is the extraordinary front-loading that occurred in January 2025. China's January 2025 total of 1,774.8 MT was 74.3% above January 2024's 1,018.0 MT and accounted for 15.5% of the full 2025 annual total – nearly double the expected ~8.3% monthly proportion. This pattern was present, to varying degrees, across virtually all China origin categories: green tea (+75.5% vs. January 2024), black tea (+73.1%), and organic (+49.7%).

The world total also saw elevated January 2025 imports (10,439.2 MT vs. 8,380.4 MT in January 2024, +24.6%), though the increase was less pronounced than China-specific categories, suggesting China front-loading was more concentrated than the broad market. The consequence is that all January 2026 vs. January 2025 comparisons must be understood as measuring the magnitude of the drawdown from an exceptional peak, not the trajectory of underlying demand.

11.2 What is Genuine Structural Decline vs. Base Effect

Applying the normalized January 2024 comparator consistently reveals a more nuanced picture. China green tea and China total imports are broadly stable on a normalized basis (+5.9% and -8.5% respectively). China black tea shows a genuine structural softening of approximately 25%, independent of the base effect, driven primarily by the large fermented black tea category. China organic is the clear outperformer with genuine multi-year growth of 56.6% versus the 2024 base.

Category	YoY vs. Jan 2025	vs. Jan 2024 (normalized)	Assessment
China Total	-47.5%	-8.5%	Mostly base effect
China Green Tea	-39.6%	+5.9%	Entirely base effect – stable
China Black Tea	-56.5%	-24.7%	Partly structural decline
China Organic	+4.6%	+56.6%	Genuine growth
World Total Green	-21.2%	+3.7%	Mostly base effect
World Organic	-33.6%	-21.1%	Partly structural contraction

11.3 Sustained Price Inflation

Average tea import prices have risen substantially. World average prices in January 2026 stand at \$5.74/kg, up from \$4.76/kg in January 2025 (+20.6%) and \$5.40/kg in January 2024 (+6.3%). The January 2025 price dip to \$4.76/kg was itself a front-loading artifact – the surge in bulk lower-value commodity grades diluted the average price that month. The January 2026 price represents a genuine structural elevation above January 2024 levels, consistent with broader commodity price trends and possible tariff cost pass-through.

11.4 China Organic as the Consistent Outperformer

China organic tea has posted consecutive January volume records: 79.1 MT (2023), 117.1 MT (2024), 175.3 MT (2025), and 183.4 MT (2026). The 2025 gain was driven primarily by genuine demand growth (unlike conventional categories where front-loading dominated), making the 2026 comparison on a like-for-like basis favorable. This 131.9% three-year growth in January volumes, confirmed as real rather than front-loading driven, represents the clearest positive structural trend in the US tea import data.

11.5 Non-China Organic Supply Contraction

Non-China organic origins declined from 316.1 MT in January 2024 to 339.8 MT in January 2025 (a genuine increase) before collapsing to 158.7 MT in January 2026 (-53.3% YoY, -49.8% vs. 2024). Some portion of January 2025's non-China organic elevation may reflect front-loading, but the severity of the January 2026 contraction exceeds what base effects alone would explain. This

represents a genuine supply-side disruption or sourcing shift that warrants active supply chain monitoring.

11.6 China's Green Tea Market Share: Stable, Not Collapsing

As demonstrated in Section 4, China's share of US green tea imports was 35.1% in January 2024 and is 35.9% in January 2026 — essentially flat. The headline January 2025 figure of 46.8% was anomalous. This is a significant analytical correction to narratives suggesting China is losing green tea market share in the US: on a normalized basis, its position is stable and may even have marginally strengthened.

12. Key Findings, Insights, and Forward Outlook

12.1 Overall Market Dynamics

The US tea import market in January 2026 is best understood through three simultaneous forces: (1) normalization following extraordinary 2025 front-loading, which distorts nearly all year-over-year comparisons; (2) structural price inflation (+20.6% avg. import price) that is partially offsetting volume declines in value terms; and (3) a rebalancing of origin mix away from Chinese conventional teas. Once front-loading effects are stripped out using January 2024 as a normalized baseline, world total imports are up 11.0% and the overall market appears healthy.

The primary risks to the 2026 outlook are: prolonged demand drawdown in categories that were most heavily front-loaded (particularly conventional black tea); continued price inflation that may dampen import volumes at current price levels; and the ongoing contraction in non-China organic supply.

12.2 Tea Type Trends

Green tea is stable on a normalized basis, with China at +5.9% and world green at +3.7% versus January 2024. The category shows no structural deterioration. Black tea presents a more concerning picture: China black tea is -24.7% versus January 2024, and world black tea has

declined. Organic teas represent the clear growth narrative, with China organic up 56.6% versus 2024 and a proven three-year compound annual growth rate of +32.4% in January volumes.

Within green tea, the emerging shift toward organic and flavored formats is notable. Conventional large-format non-fermented green tea (HS 902209050) appears structurally challenged, while organic green categories and flavored formats are growing consistently across both the front-loaded and normalized baselines.

12.3 Emerging Patterns

Key emerging patterns include: the rapid growth of flavored green tea (HS 902201000, from 0.2 MT in January 2024 to 12.2 MT in January 2026, +6,000%); the consistent organic premium emerging in China tea pricing (\$6.42/kg organic vs. \$5.29/kg overall China average); and the concentration of US organic tea supply in China, which rose from 27% of world organic in January 2024 to 54% in January 2026. This concentration may create both opportunity (for Chinese organic exporters) and risk (for US buyers who may face supply vulnerability if Chinese organic supply were disrupted).

12.4 Forecasting Models and 2026 Outlook

Three quantitative models were applied to project full-year 2026 China and world total import volumes. Given the known front-loading distortion, all models are calibrated against normalized 2024 baselines where possible.

Model 1 – Seasonal Share Projection (Confidence: 65%): Historical January figures represent 8.3–9.3% of annual China imports (excluding front-loaded 2025). Applying 8.8% (midpoint of 2022–2024 range, normalized) to January 2026's 931.1 MT yields a projected 2026 full-year China total of ~10,580 MT. For world totals, applying a 7.5% seasonal share to 9,301.9 MT yields ~124,000 MT. This model is sensitive to the choice of seasonal share and has moderate confidence.

Model 2 – Linear Trend Regression, Normalized Baselines (Confidence: 55%): Using annual China totals 2020–2025 and adjusting the 2025 figure for front-loading effects (removing January's estimated excess ~756 MT above trend), the underlying trendline points to a 2026 full-year China total in the range of 9,800–11,000 MT. The wide range reflects uncertainty about

the duration of the post-front-loading drawdown. World total projection on the same basis: 108,000–118,000 MT.

Model 3 – Three-Year Moving Average (Confidence: 70%): The three-year moving average of annual China imports (2023–2025: 9,952, 11,904, 11,435 MT) yields 11,097 MT as a 2026 projection. For world totals, the three-year average (2023–2025: 103,788, 123,362, 111,950 MT) yields 113,033 MT. This model carries the highest confidence as it smooths single-year anomalies and does not require front-loading adjustments.

Model	2026 China Projection (MT)	2026 World Projection (MT)	Confidence
Seasonal Share (Model 1)	~10,580	~124,000	65%
Linear Trend, Normalized (Model 2)	~9,800–11,000	~108,000–118,000	55%
3-Year Moving Average (Model 3)	~11,097	~113,033	70%
Consensus Range	~10,000–11,100	~108,000–124,000	60–70%

12.5 Conclusion

The central analytical conclusion of this report is that January 2026 US tea imports, when properly contextualized against the front-loaded January 2025 baseline, do not indicate a market in decline. World total imports are 11.0% above January 2024 levels. China green tea is 5.9% above January 2024. China organic is 56.6% above January 2024. The only category showing a genuine structural challenge independent of base effects is China conventional black tea, which is approximately 25% below January 2024 levels.

Three themes define the 2026 outlook: (1) base-effect normalization will progressively reduce apparent YoY declines as 2026 progresses, with the most favorable comparisons expected from April through December; (2) price inflation of ~6–20% will persist as a structural feature of the market; and (3) China organic will continue outperforming conventional categories, with the risk that supply concentration in China becomes a market vulnerability.

The consensus forecast projects 2026 full-year China imports in the range of 10,000–11,100 MT and world total imports in the range of 108,000–124,000 MT. Confidence is moderate (60–70%). The primary uncertainty is the depth and duration of demand drawdown in categories most heavily front-loaded in 2025, and whether China black tea’s structural softening accelerates or stabilizes.

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