



Euromonitor
International

Hot Drinks in South Africa

November 2025

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EXECUTIVE SUMMARY

Price inflation, sustainability and channel shifts reshape hot drinks in South Africa

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Price hikes push up value sales in hot drinks in 2025

Sustainability comes to the fore

Younger consumers opt for on-trade experiences

WHAT'S NEXT?

Persistent price rises ensure further value growth

Private label set to expand and present greater challenge to branded favourites

E-commerce to see further expansion through omnichannel strategies

COMPETITIVE LANDSCAPE

Nestlé remains leader of overall hot drinks in South Africa

Private label gains rapid ground

CHANNELS

Supermarkets leads distribution as e-commerce outpaces all others in terms of growth

Foodservice sees slowed volume growth in 2025

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[Coffee in South Africa](#)

KEY DATA FINDINGS

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Price-driven value growth, home brewing and sustainability drive development in coffee in South Africa

INDUSTRY PERFORMANCE

Rapid rises in value sales result from drastic price hikes

Fresh coffee beans drives overall growth thanks to home brewing trend

WHAT'S NEXT?

Continued cost elevation will mean further strong value growth

Premium trends support growing interest in whole bean coffee and cold brew coffee

Sustainability will remain critical focus

COMPETITIVE LANDSCAPE

Nestlé leads as consumers remain loyal to iconic brands

Private label benefits from inflationary pressures

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INDUSTRY PERFORMANCE

Tea benefits from cultural role and health-giving properties

Fruit/herbal tea drives growth with green tea also rising

WHAT'S NEXT?

Both value and volume sales set to rise in response to demand for functional hot drinks and cross-category innovation

Developments in agriculture streamline processing methods
Rooibos and honeybush will continue to attract through health profile

COMPETITIVE LANDSCAPE

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[Other Hot Drinks in South Africa](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising prices, health positioning and Nestlé's dominance shape other hot drinks in South Africa

INDUSTRY PERFORMANCE

Rising prices support value growth but hamper volumes
Flavoured powder drinks and other plant-based hot drinks see rising interest

WHAT'S NEXT?

Health and wellness trends to drive future growth and development
Innovation aligns with lifestyle choices
Possibility of sugar tax prompts players to reformulate offerings

COMPETITIVE LANDSCAPE

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