



Euromonitor  
International

# Tea in South Africa

November 2025

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## Tea in South Africa - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Health-focused innovation and indigenous herbal teas drive growth for tea in South Africa

#### 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

National brands leads with diverse product portfolio

Private label enjoys rapid expansion

#### CHANNELS

Convenience and extensive network supports supermarket channel's continued distribution lead

E-commerce rises fastest with extensive array of niche offerings

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## Hot Drinks in South Africa - Industry Overview

### 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

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