



# Coffee in Australia

November 2025

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## Coffee in Australia - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Price-led value growth amid resilient café culture and evolving at-home consumption

#### INDUSTRY PERFORMANCE

Premiumisation at home and evolving value preferences

Strong momentum in fresh coffee beans

#### WHAT'S NEXT?

Expectations for steady but moderating value growth

Expansion of cold, ready-to-drink, and hybrid coffee formats

Sustainability and ethical sourcing as long-term growth drivers

#### COMPETITIVE LANDSCAPE

Nestlé maintains leadership through convenience, innovation, and café-style experiences

Private label strengthens position through value-led premiumisation

#### CHANNELS

Supermarkets remain the dominant distribution channel

E-commerce remains the fastest-growing channel

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[Hot Drinks in Australia - Industry Overview](#)

### EXECUTIVE SUMMARY

Hot drinks maintain steady value growth amid inflation easing and shifting consumer priorities

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Health, functionality and clean-label trends reshape product development

Ethical sourcing and sustainability strengthen brand positioning

Matcha shifts from niche trend to mainstream staple

#### WHAT'S NEXT?

Outlook shaped by stabilising prices, renewed confidence and evolving consumer priorities

Functional reformulation and wellness-led innovation to accelerate

Sustainability set to become a baseline expectation

## COMPETITIVE LANDSCAPE

Nestlé maintains category leadership through breadth, innovation and domestic investment  
Coffee stands as the most dynamic category, fuelled by both premium and affordable innovation

## CHANNELS

Supermarkets remain the dominant channel supported by value seeking and private label expansion  
E-commerce remains the fastest-growing channel through expanded fulfilment and digitally led retail execution

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For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/coffee-in-australia/report](http://www.euromonitor.com/coffee-in-australia/report).