



Coffee in Belgium

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Stable volumes despite price pressures reflect coffee's cultural importance

INDUSTRY PERFORMANCE

Current value growth reflects price rises and ongoing premiumisation

Fresh coffee beans offer superior taste experience

WHAT'S NEXT?

Relatively stable performance expected despite ongoing price pressures

Innovation set to focus on experience and sustainability

Iced coffee made at home could emerge as the next consumer trend

COMPETITIVE LANDSCAPE

Private label and global giants shape a competitive landscape

Ongoing price consciousness boosts sales of private label lines

CHANNELS

Modern grocery retailers dominate, while online remains niche outside Nespresso

Decline in alcohol consumption boosts sales of coffee through food service

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

EXECUTIVE SUMMARY

Value growth reflects premiumisation and price rises

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Volume sales remain stable but stagnant, while current value sales register robust increase

Local consumers continue to enjoy hot drinks in their daily lives, despite price rises

Premiumisation trend continues apace in 2025

WHAT'S NEXT?

Value growth expected to remain steady and robust in the years ahead

Focus on personalisation and added value, likely as players vie for share

Landscape is one of incremental evolution, rather than transformation

COMPETITIVE LANDSCAPE

Nestlé continues to lead overall sales thanks to widespread popularity of its key brands
Private label benefits from price consciousness in an inflationary environment

CHANNELS

Modern grocery retailers remain the biggest distribution channels in 2025
Discounters enjoys notable dynamism thanks to quality of private label lines
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