



**Euromonitor
International**

Hot Drinks in Italy

November 2025

Table of Contents

EXECUTIVE SUMMARY

Hot drinks continues to experience price challenges but premiumisation is evident

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Mixed performance for hot drinks but perceived healthier options attract consumers

Innovation focuses on sustainability in coffee

Rising preference for bean and pod formats impacts standard fresh ground coffee

Strong emphasis on wellness and functionality within tea

WHAT'S NEXT?

Convenience and health trends to drive future demand for hot drinks

Further innovation in sustainable packaging and sophisticated drinks solutions

At-home consumption of hot drinks set to further decline

COMPETITIVE LANDSCAPE

Major coffee players retain overall lead of competitive landscape

Yogi Tea leverages health trends to record further dynamic growth

CHANNELS

Supermarkets remains leading distribution channel, offering competitive private label

E-commerce and vending most dynamic channels from low base

Foodservice vs retail split

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

[Coffee in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Convenience and affordability are major trends drives coffee's performance

INDUSTRY PERFORMANCE

Pricing influences consumers' purchasing decisions

Strong performance by fresh ground coffee pods driven by convenience and innovation

WHAT'S NEXT?

Italians to increasingly seek sophistication and convenience in their coffee of choice

Vending offers growth potential as alternative channel outside of the home

Sustainability set to influence innovative packaging solutions

COMPETITIVE LANDSCAPE

Luigi Lavazza SpA retains lead of consolidated competitive landscape

Smaller players show dynamism, while L'Aromatica focuses on its pod formats

L'Or Espresso focuses on influencer marketing for more personable approach

CHANNELS

Grocery retailers dominate distribution, with private label making gains

Dynamic performance by retail e-commerce supported by DTC channels

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 31 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

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[Tea in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health and wellness drives tea's positive performance in Italy

INDUSTRY PERFORMANCE

Rising prices and healthy perception drive tea's value sales

Green tea continues to rebound in 2025

Fruit/herbal tea remains dynamic performer, driven by health and wellness positioning

WHAT'S NEXT?

Fruit/herbal tea set to continue driving category sales forward

Vending offers expansion for tea producers in different packaging formats

Wellness and functionality to remain crucial growth drivers for tea

COMPETITIVE LANDSCAPE

Twinings remains leading brand in fairly fragmented competitive landscape

Yogi Tea enjoys dynamic performance with wide range of fruit/herbal tea options

CHANNELS

Supermarkets remains dominant with mix of affordability and quality

E-commerce makes gains with convenience, wide variety and competitive pricing

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2020-2025

Table 38 - Retail Sales of Tea by Category: Value 2020-2025

Table 39 - Retail Sales of Tea by Category: % Volume Growth 2020-2025

Table 40 - Retail Sales of Tea by Category: % Value Growth 2020-2025

Table 41 - NBO Company Shares of Tea: % Retail Value 2021-2025

Table 42 - LBN Brand Shares of Tea: % Retail Value 2022-2025

Table 43 - Forecast Retail Sales of Tea by Category: Volume 2025-2030

Table 44 - Forecast Retail Sales of Tea by Category: Value 2025-2030

Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030

Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

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[Other Hot Drinks in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Other hot drinks continues to struggle with unhealthy image

INDUSTRY PERFORMANCE

Flat value sales and declining demand for other hot drinks in Italy

Barley options support malt-based hot drinks

WHAT'S NEXT?

Further challenges ahead for other hot drinks in Italy

Barley capsules offer growth potential as convenient format

Imminent sugar tax likely to place further pressure on chocolate-based options

COMPETITIVE LANDSCAPE

Nestlé Italiana retains overall dominance with Nesquik

Smaller malt-based producers record stronger growth in 2025

CHANNELS

Grocery retailers remain most popular destinations for purchasing other hot drinks

Convenience drives growth of other hot drinks through e-commerce

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025

Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025

Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025

Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025

Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

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