



# Coffee in South Africa

November 2025

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## Coffee in South Africa - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

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

#### CHANNELS

Supermarkets leads distribution through convenience and favourable pricing

Warehouse clubs shows fastest growth while e-commerce benefits from retail investment in digital presence

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## Hot Drinks in South Africa - Industry Overview

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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

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