

Competitor Strategies in Hot Drinks

May 2025

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Nestlé retains a big lead in a largely stable market landscape in hot drinks
Market momentum growth continues to drive sales of leading hot drinks players
Developing markets continue to be key focus for leading hot drinks companies
Nestlé, Strauss/São Miguel and Unilever lead in active category share
Most top 10 players achieve close to 100% of total sales with their power brands
Company rankings expected to remain stable, with minimal changes in leading players

Tariffs loom large and pile uncertainty onto company strategies

KEY PLAYERS: COFFEE

Nestlé continues to dominate in hot drinks through innovations amidst challenges

Uphill challenge, yet JDE relies mainly on innovation and sustainability to grow

Expansion of Asian specialist coffee shops to challenge leading coffee players

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KEY PLAYERS: TEA

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