



Euromonitor  
International

# Hot Drinks in South Africa

November 2025

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### EXECUTIVE SUMMARY

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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Supermarkets leads distribution as e-commerce outpaces all others in terms of growth

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## SOURCES

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[Coffee in South Africa](#)

## 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

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Health-focused innovation and indigenous herbal teas drive growth for tea in South Africa

### INDUSTRY PERFORMANCE

Tea benefits from cultural role and health-giving properties

Fruit/herbal tea drives growth with green tea also rising

### WHAT'S NEXT?

Both value and volume sales set to rise in response to demand for functional hot drinks and cross-category innovation

Developments in agriculture streamline processing methods  
Rooibos and honeybush will continue to attract through health profile

## COMPETITIVE LANDSCAPE

National brands leads with diverse product portfolio  
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## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Rising prices, health positioning and Nestlé's dominance shape other hot drinks in South Africa

## INDUSTRY PERFORMANCE

Rising prices support value growth but hamper volumes  
Flavoured powder drinks and other plant-based hot drinks see rising interest

## WHAT'S NEXT?

Health and wellness trends to drive future growth and development  
Innovation aligns with lifestyle choices  
Possibility of sugar tax prompts players to reformulate offerings

## COMPETITIVE LANDSCAPE

Nestlé dominates with well-known brands amid increased parallel imports  
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