



Coffee in Australia

November 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price-led value growth amid resilient café culture and evolving at-home consumption

INDUSTRY PERFORMANCE

Premiumisation at home and evolving value preferences

Strong momentum in fresh coffee beans

WHAT'S NEXT?

Expectations for steady but moderating value growth

Expansion of cold, ready-to-drink, and hybrid coffee formats

Sustainability and ethical sourcing as long-term growth drivers

COMPETITIVE LANDSCAPE

Nestlé maintains leadership through convenience, innovation, and café-style experiences

Private label strengthens position through value-led premiumisation

CHANNELS

Supermarkets remain the dominant distribution channel

E-commerce remains the fastest-growing channel

CATEGORY DATA

Table 1 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 2 - Retail Sales of Coffee by Category: Value 2020-2025

Table 3 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 5 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 6 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 7 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 8 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 9 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 10 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Hot Drinks in Australia - Industry Overview

EXECUTIVE SUMMARY

Hot drinks maintain steady value growth amid inflation easing and shifting consumer priorities

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health, functionality and clean-label trends reshape product development

Ethical sourcing and sustainability strengthen brand positioning

Matcha shifts from niche trend to mainstream staple

WHAT'S NEXT?

Outlook shaped by stabilising prices, renewed confidence and evolving consumer priorities

Functional reformulation and wellness-led innovation to accelerate

Sustainability set to become a baseline expectation

COMPETITIVE LANDSCAPE

Nestlé maintains category leadership through breadth, innovation and domestic investment
Coffee stands as the most dynamic category, fuelled by both premium and affordable innovation

CHANNELS

Supermarkets remain the dominant channel supported by value seeking and private label expansion
E-commerce remains the fastest-growing channel through expanded fulfilment and digitally led retail execution

FOODSERVICE VS RETAIL SPLIT

MARKET DATA

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
Table 13 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
Table 14 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
Table 15 - Retail Sales of Hot Drinks by Category: Value 2020-2025
Table 16 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 17 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
Table 18 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
Table 19 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 20 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
Table 21 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
Table 22 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
Table 23 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
Table 24 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
Table 25 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
Table 26 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
Table 28 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
Table 29 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
Table 30 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 32 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
Table 34 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 35 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
Table 36 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.

- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/coffee-in-australia/report.