



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

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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

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Private label gains rapid ground

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