



**Euromonitor
International**

Coffee in Australia

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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

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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

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