



Coffee in Italy

November 2025

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Coffee in Italy - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Convenience and affordability are major trends drives coffee's performance

INDUSTRY PERFORMANCE

Pricing influences consumers' purchasing decisions

Strong performance by fresh ground coffee pods driven by convenience and innovation

WHAT'S NEXT?

Italians to increasingly seek sophistication and convenience in their coffee of choice

Vending offers growth potential as alternative channel outside of the home

Sustainability set to influence innovative packaging solutions

COMPETITIVE LANDSCAPE

Luigi Lavazza SpA retains lead of consolidated competitive landscape

Smaller players show dynamism, while L'Aromatica focuses on its pod formats

L'Or Espresso focuses on influencer marketing for more personable approach

CHANNELS

Grocery retailers dominate distribution, with private label making gains

Dynamic performance by retail e-commerce supported by DTC channels

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Hot Drinks in Italy - Industry Overview

EXECUTIVE SUMMARY

Hot drinks continues to experience price challenges but premiumisation is evident

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Mixed performance for hot drinks but perceived healthier options attract consumers

Innovation focuses on sustainability in coffee

Rising preference for bean and pod formats impacts standard fresh ground coffee

Strong emphasis on wellness and functionality within tea

WHAT'S NEXT?

Convenience and health trends to drive future demand for hot drinks

Further innovation in sustainable packaging and sophisticated drinks solutions

At-home consumption of hot drinks set to further decline

COMPETITIVE LANDSCAPE

Major coffee players retain overall lead of competitive landscape

Yogi Tea leverages health trends to record further dynamic growth

CHANNELS

Supermarkets remains leading distribution channel, offering competitive private label

E-commerce and vending most dynamic channels from low base

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