

SOUTH AFRICAN COFFEE INDUSTRY LANDSCAPE REPORT

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COMPANY OVERVIEW



Insight Survey is a South African, boutique market research agency with more than 15 years of experience, specialising in Business-to-Business (B2B) and Industry research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal and external environment.

We believe in the advantage market research gives business leaders to fully understand their industry, facilitate business strategy, improve company performance, and drive company growth.

INDUSTRY & COMPETITOR INTELLIGENCE






Our bespoke Industry and Market Intelligence can help give the edge in a global marketplace, empowering your business to overcome industry challenges quickly and effectively, and enabling you to realise your potential and achieve your vision. From strategic overviews of your business’s competitive environment through to specific competitor profiles, our customised Intelligence is designed to meet your unique needs.

QUESTIONS WE HELP ANSWER

- What is the current and future market size?
- What are the latest global and local trends impacting on the market?
- Who are your key competitors and what is their offering in terms of products, services, pricing and branding?



OUR RESEARCH SOLUTIONS

- 
Competitor pricing research
- 
Store visits and store checks
- 
Competitor interviews
- 
Customer interviews
- 
Company website analysis
- 
Governmental held records

OUR FOOD AND BEVERAGE EXPERIENCE

We are a proudly South African company that have provided market research solutions and Intelligence reports to local and global brands. We have worked with some of the greatest companies and brands in their industries.



The **South African Coffee Industry Landscape Report (158 pages)** provides a dynamic synthesis of industry research, examining the local and global **Coffee industry** from a uniquely holistic perspective, with detailed insights into the entire value chain – market size, industry trends, innovation and technology, industry drivers and challenges, manufacturer/distributor overview, roasters overview, retail and pricing analysis.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Coffee Industry Section:

- What are the current market dynamics (production, consumption, imports and exports trade) of the Global Coffee industry?
- Which are the key markets within the Global Coffee industry?
- What are the latest Global Coffee industry trends, innovation and technology, drivers, and challenges?

For the South African Coffee Industry Section:

- What are the current market dynamics (market size, market value, market volumes, imports and exports trade): 2018-2023 Actual, 2024-2028 Forecasts, and distribution channels?
- What are the latest South African Coffee industry trends, innovation and technology, drivers, and challenges?

For the South African Coffee Manufacturer & Distributor Section:

- Which are the key manufacturers and distributors in the South African Coffee industry?
- For each key player, what is the latest company news in terms of products, services, new launches, and marketing initiatives?
- Which popular Coffee brands and products do the respective companies manufacture/distribute?

For the South African Coffee Retail and Pricing Analysis Section:

- Which are the key retail players (franchised and chain coffee shops, retail house brands, convenience stores) in the South African Coffee industry?
- What are the prices of popular Coffee brands (Instant Coffee, Fresh & Ground Coffee, Capsules, Beans, and Ready-To-Drink Coffee) across South African retail outlets?

SCREENSHOTS FROM REPORT

158-page report filled with detailed charts, graphs, and insights

1. EXECUTIVE SUMMARY: Overview of the global coffee market, including production and consumption trends.

2. EXECUTIVE SUMMARY: SA INDUSTRY SNAPSHOT: Detailed analysis of the South African coffee market, covering production, processing, and trade.

3. EXECUTIVE SUMMARY: SA INDUSTRY SNAPSHOT: Further insights into the South African coffee market, focusing on key players and market dynamics.

4. EXECUTIVE SUMMARY: SA INDUSTRY DRIVERS AND CHALLENGES: Analysis of factors influencing the South African coffee industry, such as local industry drivers and challenges.

5. 1. GLOBAL COFFEE INDUSTRY: Overview of the global coffee industry, including production and consumption trends across major regions.

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13. GLOBAL KEY MARKETS: Detailed analysis of key global coffee markets, including regional market trends and dynamics.

14. GLOBAL INDUSTRY TRENDS: Overview of global coffee industry trends, including emerging technologies and market developments.

15. GLOBAL INDUSTRY TRENDS: Further insights into global coffee industry trends, including detailed regional data and trends.

The global Coffee market is expected to reach an estimated value of approximately US\$468.2 billion in 2024*, in terms of revenue, representing a 3.4% increase over 2023, when the market reached approximately US\$495.5 billion. Moreover, the market is expected to grow at a compound annual growth rate (CAGR) of 4.1%, to reach a value of approximately US\$549.6 billion by 2028*, as illustrated in the adjacent graph.

- In terms of volume, the global Coffee market is expected to see strong volume growth, reaching 8.1 billion kilograms by 2028*. Interestingly, by 2028*, approximately 79.5% of spending and 17.2% of volume consumption in the Coffee segment will be attributable to out-of-home consumption, which continues to be a strong market driver.
- This growth in volume and revenue is being bolstered by higher demand for, and consumption of, specialty Coffee, as consumers increasingly prefer premium quality and experiences, as well as ethical consumption and distinctive flavours. Demonstrating this, the global specialty Coffee market is projected to more than double its 2029 valuation, reaching \$51.4 billion by 2030. Moreover, 52% of consumers over the age of 18 in the United States are consuming specialty Coffee, rising to 62% for those aged 25 to 39.
- Another key driver of market growth is the increasing popularity and consumption of cold Coffee, with an associated rise in the numbers of new and innovative cold Coffee products to meet this demand. At the same time, Millennial and Generation-Z consumers are also continuing to drive the market, particularly due to rising disposable incomes and affluence.

- However, the global Coffee market faces several challenges, including the rising prices of fertiliser, which is increasing production costs and threatening Coffee quality and supply. Additionally, the spread of Coffee Leaf rust is challenging the market by reducing yields and threatening Coffee farms and farmers, whilst climate change continues to challenge the market in terms of reducing the availability of raw materials globally.
- In terms of segmentation, the global Coffee market can be segmented based on product and type. In terms of product, the market is segmented into arabica, Robusta, and Others, with arabica dominating the global Coffee bean market with 70% of market share, whilst Robusta accounts for 25% of global demand.
- In terms of type, the market is segmented into Instant Coffee, Ground Coffee, Whole Grain, and Others. Currently, Instant Coffee dominates the global market, due to its convenient nature and good taste, as well as being consumed at home and via vending machines, among others.



* Forecast

Coffee Machine Innovations Trending in the Local Market

- Innovative and technologically advanced Coffee machines and equipment have begun trending in the local market, fueled by growth in at-home Coffee consumption, specifically roast Coffee. With this, players are increasingly launching new Coffee machines into the local market to cater to these at-home Coffee consumers, making this a growing trend.
- More specifically, since the COVID-19 pandemic, at-home Coffee consumption and preparation has become increasingly popular across the world, with consumers showing growing interest in Coffee education. As a result, consumers are investing more and more in premium at-home Coffee brewing equipment, with these systems also becoming more technologically advanced and intuitive, resulting in innovative Coffee machines and equipment becoming a prominent trend.
- This trend is also being seen locally, with the growth of at-home consumption driving innovations in new Coffee machines and equipment. Specifically, according to Statista, the at-home revenue of the roast Coffee segment in South Africa is expected to grow from approximately US\$77.3 million in 2023 to approximately US\$86.6 million in 2024.
- As an example of local Coffee machine innovation and advancement, Genio Roasters recently introduced a new Artificial Intelligence (AI) based Coffee roaster, the Genio Evolution Roaster. This roaster integrates Machine Learning (ML) to bridge the gap between cupping scores and roast profiles, with the AI algorithm enabling precise adjustments during roasting to consistently achieve desired flavor profiles.

- In addition, the Blume 2-Step Pro Capsule Machine was also recently introduced in the local market, a user-friendly and budget-friendly solution for home Coffee brewing. The machine utilises a two-step process, including pre-infusion or 'blooming', followed by the brewing or pressure stage, resulting in a more balanced product with no blanding.
- Furthermore, Nespresso recently launched a range of new Coffee machines, including the Vertuo Pop, Vertuo Creatista, and Vertuo Latissima. The Latissima and Creatista machines create an experience with automatic streamlined Coffee preparation, while the Vertuo Pop machine ensures a smooth and consistent Coffee blend recognition, among other features.
- Therefore, Coffee machine advancement and innovation is trending in the South African market, as part of an overall shift to home brewing and at-home consumption. This is resulting in the introduction of new machines that offer accessible and technologically advanced solutions to cater to the evolving preferences of at-home Coffee enthusiasts.



Vida e Caffè Introduces New Flavoured Mochas

- In May 2024, Vida e Caffè announced three new variants of its flavoured Mochas product, namely Choc Cookie Mocha, Hazelnut Mocha, and White Chocolate Mocha. This introduction is part of the company's new winter comfort menu.
- According to the company, each flavoured mocha has been crafted with rich espresso and unique flavours to provide a decadent Coffee beverage. The Choc Cookie Mocha offers a chocolate and crunch cookie flavour, whilst the Hazelnut Mocha has the flavour of hazelnut with a touch of a nutty sweetness.
- Moreover, the White Chocolate Mocha offers a creaming white chocolate flavour that works well with Vida e Caffè's espresso to provide a smooth and decadent taste.



Douwe Egberts Launches Ready-to-Drink Iced Coffees

- In November 2023, Douwe Egberts South Africa announced the launch of its new ready-to-drink iced Coffees available in two variants, namely Ice Cappuccino and Ice Mocha Latte. The iced Coffees were described as refreshingly tasty, aiming to elevate the enjoyment of chilled beverages.
- More specifically, the Ice Cappuccino includes a blend of iced Coffee with milk, infused with a subtle cocoa essence, all packaged in a convenient can. This product is crafted from a unique combination of 100% premium arabica Coffee beans, delivering an energy boost whenever needed.
- The Ice Mocha Latte is an iced Coffee that boasts a creamy texture and a gentle mocha flavor, crafted from the same premium 100% arabica Coffee beans, offering a delightful surprise any time of the day.





[Nescafé Holds a Nescafé Hamper Competition on its Website](#)

In November 2023, Nescafé, a Nestlé brand, hosted its 'Nescafé hamper' competition. The competition ran from 15 November to 15 December 2023, and in order to enter, participants were required to sign up to be a part of Nescafé's 'Coffee Crew' directly via links from the company's social media platforms. Winners received one of 10 Nescafé hampers to the value of R400.

(15 November 2023)



[Nestlé Releases New Nescafé Gold All'Italiana Product](#)

In November 2023, Nescafé, a Nestlé brand, promoted the release of its new Nescafé Gold All'Italiana product, with a post on its Facebook page. More specifically, the product is offered in granulated Coffee format, featuring a new, strong, and fiery taste. Additionally, the product has a dark and lively aroma, and is 100% responsibly-sourced Coffee. *(15 November 2023)*



[Nestlé Displays their Commitment to Youth Development through Collaboration](#)

In October 2023, Nestlé featured in a Media Update news article that emphasised the importance of creating platforms for African youth by addressing socio-economic issues through collaborations with businesses and non-profits. The article also highlighted Nestlé's 'Nestlé Needs Youth' programme, and the 'Iron Sharpens Iron' podcast series. *(20 October 2023)*



[Nespresso Appoints New Chief Executive Officer for South Africa](#)

In September 2023, Nespresso a Nestlé brand, announced the appointment of Gabriel Nobre as the company's new Chief Executive Officer (CEO) for South Africa. Noble has worked at Nestlé since 2005, where he has held several positions in multiple business units and corporate functions, and is looking forward to accelerating the growth of Nespresso South Africa.

(11 September 2023)



[Nestlé Recognised as the Most Valuable Food Brand](#)

In August 2023, Nestlé was featured in a Bizcommunity news article on its recognition as the world's most valuable food brand, according to Brand Finance's annual top 100 ranking. Nestlé received this accolade on the back of steadily growing brand value throughout 2023, due to strong sales growth across its extensive and varied brand portfolio, as well as introducing new products, amongst other factors. *(31 August 2023)*



[Nestlé Reports Strong Half-Year Results for 2023](#)

In July 2023, Nestlé featured in a Yahoo Finance news article on its earnings release for the second quarter of 2023. More specifically, the company reported strong results, with total reported sales increasing by 1.6% to CHF 46.3 billion. Moreover, underlying earnings per share increased by 11.1% in constant currency to CHF 2.43. *(27 July 2023)*



[Nestlé Launches Local Coffee Mix Production Plant in Hammanskraal](#)

In July 2023, Nestlé inaugurated its new local Coffee mix production plant in Hammanskraal. The company had invested R79 million into localising the production of its Nescafé Gold range of Coffee mixes, which will now be manufactured with 46% locally sourced ingredients. Nestlé also plans to start locally producing the Ricoffy 3-in-1 Coffee mix from next year.

(19 July 2023)



[Nespresso South Africa Introduces a Colour Revolution with Vertuo Pop](#)

In April 2023, Nespresso, a Nestlé brand announced the launch of the Vertuo Pop machine to complement its Vertuo range as the smallest and most affordable machine for Vertuo. This machine offers 20 unique Coffee blends and single origins in various cup sizes for Coffee lovers to enjoy. The machine is made with 35% recycled plastic, and the packaging made of 99.5% recycled materials. *(24 April 2023)*



Nestlé Good food, Good life

SAMPLE FROM REPORT

COFFEE PRICING ANALYSIS: INSTANT COFFEE














BRAND AND SIZE							
House Brand Decaf		200g	R114.99	N/A	N/A	R136.99	R118.99
Hug in a Mug		10 x 24g	R64.99	N/A	N/A	R69.99	N/A
Jacobs Instant Iced Cappuccino		8 x 20.5g sachets	R74.99	R60.00 (On Special)	N/A	R78.99	R78.99
Jacobs Krönung		200g	R164.99	R158.95	R172.99	R159.99 (On Special)	R164.99
Jacobs Krönung Cappuccino		10 x 18.7g	R54.99	R60.00 (On Special)	R74.99	R49.99	R78.99
Jacobs Krönung Decaf		200g	R189.99	R176.25	R198.99	R195.99	R204.99
Jacobs Krönung Gold		200g	R164.99	R158.95	R172.99	R164.99	R164.99
Koffiehuis Pronto Bags		48 bags	R69.99	R55.75	R49.99	R61.99	N/A
NESCAFÉ Alta Rica		200g	N/A	N/A	R179.99	R189.99	N/A

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