

SOUTH AFRICAN TEA INDUSTRY LANDSCAPE REPORT

PUBLISHED: JULY 2025

COMPANY OVERVIEW



Insight Survey is a boutique South African market research agency with over 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.

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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.



REPORT OVERVIEW

The **South African Tea Industry Landscape Report (132 pages)** provides a dynamic synthesis of industry research, examining the local and global **Tea 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, manufacturers/distributors, retail and pricing analysis.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Tea Industry Section:

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

For the South African Tea Industry Section:

- What are the current market dynamics (market size, market value, market volumes, imports and exports trade): 2019-2024 Actual, 2025-2029 Forecasts, and distribution channels?
- What are the latest South African Tea industry trends, innovation and technology, drivers, and challenges?

For the South African Tea Manufacturer & Distributor Section:

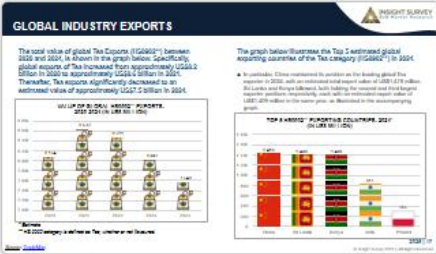
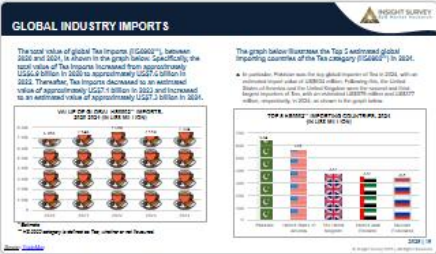
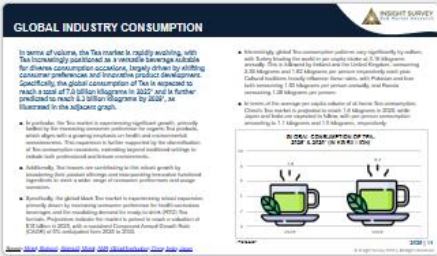
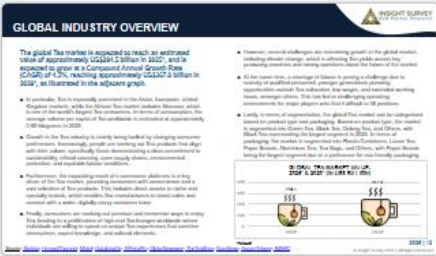
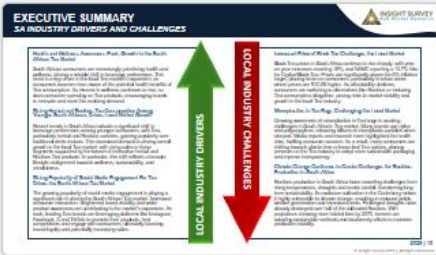
- Which are the key manufacturing and distribution players in the South African Tea industry?
- For each key player, what is the latest company news in terms of products, services, new launches, and marketing initiatives?
- Which popular Tea brands and products do the respective companies manufacture/distribute?

For the South African Tea Retail and Pricing Analysis Section:

- Which are the key retail players (franchise and independent Tea shops) in the South African Tea Industry?
- What are the prices of popular Tea brands (Black Tea, Rooibos Tea, Green Tea, Fruit/Herbal Tea, Capsules and Pods) across South African retail outlets?

SCREENSHOTS FROM REPORT

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



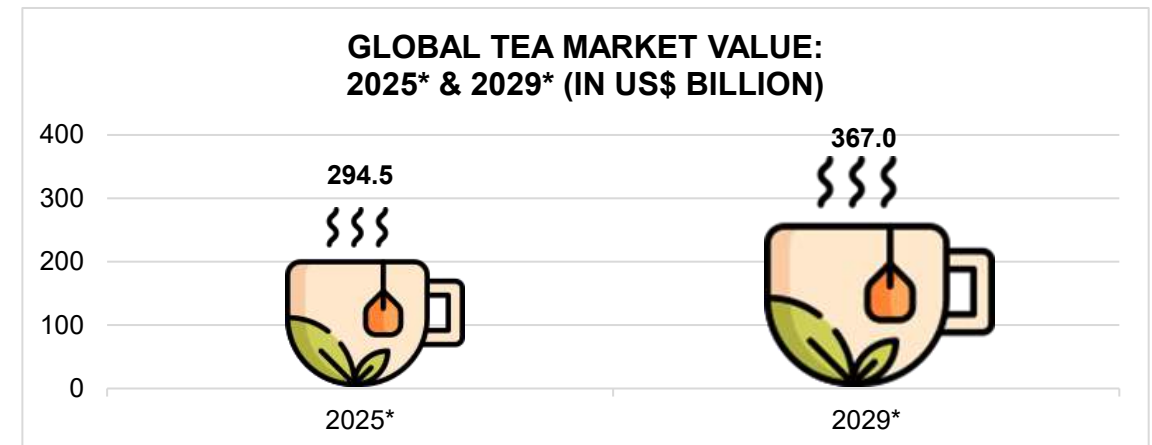
SAMPLE FROM REPORT

GLOBAL INDUSTRY OVERVIEW

The global Tea market is expected to reach an estimated value of approximately US\$294.5 billion in 2025*, and is expected to grow at a Compound Annual Growth Rate (CAGR) of 4.5%, reaching approximately US\$367.0 billion in 2029*, as illustrated in the adjacent graph.

- In particular, Tea is especially prominent in the Asian, European, United Kingdom markets, while the African Tea market includes Morocco, which is one of the world's largest Tea consumers. In terms of consumption, the average volume per capita of Tea worldwide is estimated at approximately 0.95 kilograms in 2025.
- Growth in the Tea industry is mainly being fuelled by changing consumer preferences. Increasingly, people are seeking out Tea products that align with their values, specifically those demonstrating a clear commitment to sustainability, ethical sourcing, open supply chains, environmental protection, and equitable labour conditions.
- Furthermore, the expanding reach of e-commerce platforms is a key driver of the Tea market, providing consumers with convenience and a vast selection of Tea products. This includes direct access to niche and specialty brands, which enables Tea manufacturers to boost sales and connect with a wider, digitally-savvy consumer base.
- Finally, consumers are seeking out premium and immersive ways to enjoy Tea, leading to a proliferation of high-end Tea lounges worldwide where individuals are willing to spend on unique Tea experiences that combine atmosphere, expert knowledge, and cultural elements.

- However, several challenges are restraining growth in the global market, including climate change, which is affecting Tea yields across key producing countries and raising questions about the future of the market.
- At the same time, a shortage of labour is posing a challenge due to scarcity of qualified personnel, younger generations pursuing opportunities outside Tea cultivation, low wages, and extended working hours, amongst others. This has led to challenging operating environments for major players who find it difficult to fill positions.
- Lastly, in terms of segmentation, the global Tea market can be categorised based on product type and packaging. Based on product type, the market is segmented into Green Tea, Black Tea, Oolong Tea, and Others, with Black Tea representing the largest segment in 2024. In terms of packaging, the market is segmented into Plastic Containers, Loose Tea, Paper Boards, Aluminium Tins, Tea Bags, and Others, with Paper Boards being the largest segment due to a preference for eco-friendly packaging.



*Forecast

Matcha Tea Trending in the Local Market

- Within the South African Tea market, Matcha is emerging as a fast-growing trend, driven by rising consumer interest in its functional benefits and lifestyle appeal. As a result, new store openings, brand partnerships, and product innovations centred around Matcha continue to gain traction, reflecting growing demand for healthier beverage alternatives.
- More specifically, consumers are increasingly seeking healthier-oriented drinks, and Matcha has gained popularity due to its high antioxidant content, particularly catechins, which support cellular health and combat ageing. In addition, Matcha contains L-theanine, a natural compound that provides sustained energy and improved mental clarity, offering a balanced alternative to traditional caffeinated beverages.
- Demonstrating this growing demand, several Matcha-focused stores and product ranges have recently launched in the South African market. For example, Love Matcha opened a dedicated store at Mojo Market, offering authentic Japanese Matcha products. Similarly, Ahlan Matcha expanded its presence with a new outlet in Emmarentia, Johannesburg, further cementing Matcha's growing footprint in South Africa.
- In addition, established South African brands are also capitalising on this trend. For example, Bootlegger Coffee Company, a South African coffee franchise brand, partnered with Ceremony South Africa to introduce a dedicated Matcha range across its stores. By integrating Matcha into its menu, the company continues to offer healthier options for consumers.

- Furthermore, red espresso®, a local rooibos Tea manufacturer, launched an innovative home-use Matcha range, including South Africa's first Nespresso®-compatible Matcha capsules, available in original and vanilla flavours at Woolworths stores nationwide.
- Therefore, as South African consumers continue to prioritise wellness and seek functional beverage options, Matcha is well-positioned to remain a prominent category within the local Tea market. Its combination of health benefits, product versatility, and growing availability supports its continued growth in South Africa's evolving Tea landscape.



Dilmah Launches 'Exquisitely Flavoured' Tea Collection

- In June 2025, Dilmah South Africa introduced its captivating new 'Exquisitely Flavoured' Tea range, marking a vibrant expansion into premium, taste-focused infusion.
- Crafted to delight modern consumers, the collection combines real fruit, herbs, and spices with Dilmah's renowned Ceylon Single-Region Teas, resulting in flavour combinations that promise 'double the deliciousness'.
- The lineup includes 8 blends, such as Peach & Lychee, Apple, Cinnamon & Vanilla, Cherry & Almond, Ginger & Honey, Orange & Ginger, Forest Berry, Lemon & Lime, and Mango & Strawberry.
- Each offering a sensory journey that complements Dilmah's signature garden-fresh purity, the Teas are available in individually wrapped bags, bringing café-quality flavour to home brewing.



Tetley Releases New Decaffeinated Black Tea Blend

- In May 2025, Tetley expanded its Tea portfolio with the launch of a new full-flavoured decaffeinated blend, now available for both the hospitality industry and general retail.
- The new decaf Tea aims to meet rising consumer demand for healthier lifestyle options and caffeine-free alternatives, without compromising on taste or quality. The blend is described as rich and satisfying, and ideal for moments of relaxation, for cutting caffeine intake, and improving sleep quality.
- Tetley has positioned this launch as part of a broader wellness shift in the Tea category, which continues to see increased interest in functional and better-for-you offerings.



SAMPLE FROM REPORT

JOEKELS TEA PACKERS: COMPANY NEWS



Tetley Announces the Launch of its New Decaf Black Tea

In May 2025, Tetley, a Joekels Tea Packers brand, announced the launch of its new Tetley Decaf product. The brand highlighted that the new product offered the same taste as its original black Tea, but at an affordable price, encouraging consumers to choose Tetley Decaf as an option to reduce caffeine intake and improve their health, mood, and sleep. *(15 May 2025)*



Laager Rooibos Celebrates Valentine's Day with a Competition Giveaway

In February 2025, Laager Rooibos, a Joekels Tea Packers brand, celebrated Valentine's Day with a competition giveaway, where one lucky winner stood a chance to receive a picnic kit worth R3,000. To enter, participants were required to like the post and mention in the comments the name of the person they would love to share the picnic moment with. *(14 February 2025)*



Laager Rooibos Celebrates National Rooibos Day

In January 2025, Laager Rooibos, a Joekels Tea Packers brand, celebrated National Rooibos Day by encouraging South African consumers to honour the country's beloved 'local jewel'. More specifically, the brand invited consumers to join the celebration by sharing their special moments using the tagline '#RooibosDay' and tagging the brand in their post. *(16 January 2025)*



Laager Rooibos Celebrates Youth Innovation and Sustainability

In November 2024, Laager Rooibos, a Joekels Tea Packers brand, celebrated youth innovators through its 'Laager Schools Design and Science Competition'. In partnership with The Creative Space and TDL Advertising, learners from the Western Cape presented sustainability-driven ideas focused on ways to recycle rooibos Tea for home and garden use. *(25 November 2024)*



Laager Rooibos Announces Silver Award for Cranberry & Wild Cherry Flavoured Tea

In August 2024, Laager Rooibos, a Joekels Tea Packers brand, announced that its Cranberry & Wild Cherry Flavoured Tea had received a Silver award at the 'Aurora International Taste Challenge'. The brand encouraged South Africans to celebrate the recognition by enjoying the award-winning flavour, which continues to set new standards. *(6 August 2024)*



Laager Rooibos Introduces Two New CBD Infused Tea Products

In July 2024, Laager Rooibos, a Joekels Tea Packers brand, introduced its new CBD-infused Rooibos Tea available in two variants, Laager Plus CBD Rooibos Relax and CBD Rooibos Sleep. The brand highlighted that the new range is Tetrahydrocannabinol (THC) and caffeine-free, and provides the calming and sleep enhancing effects of CBD. *(19 July 2024)*



Tetley Promotes New Instant Chai Latte Teas

In July 2024, Tetley, a Joekels Tea Packers brand, promoted its new Instant Chai Lattes, available in original and vanilla flavours. The brand highlighted that Tetley's Instant Chai Lattes combine the fragrant richness of real spices with the creamy indulgence of a latte, encouraging consumers to explore three different ways to enjoy the offerings during winter. *(8 July 2024)*



Tetley Partners with Salons Nationwide to Celebrate its Flavourful Blends

In July 2024, Tetley, a Joekels Tea Packers brand, partnered with local salons nationwide to promote its Tea blends. Consumers visiting partner salons were offered a complimentary cup of Tetley Tea and stood a chance to win one of five salon vouchers valued at R2,000 each by posting photos on Instagram and sharing what they love most about Tetley Teas. *(3 July 2024)*



SAMPLE FROM REPORT

TEA PRICING ANALYSIS: BLACK TEA

BRAND AND SIZE			Checkers	makro	Pick n Pay	SPAR	Woolworths
Dilmah Earl Grey		50s	R74.99	N/A	R69.99	N/A	N/A
Dilmah English Breakfast		50s	R74.99	N/A	R69.99	N/A	N/A
Dilmah Premium Single Origin 100% Ceylon Tea		100s	R59.99	N/A	R69.99	N/A	N/A
Five Roses Ceylon Blend Tagged Tea Bags		100s	R104.99	N/A	R68.99	R114.99	R109.99
Five Roses Creamy Tea Latte		10s	R79.99	R71.75	N/A	R79.99	N/A
Five Roses Decaffeinated Black Tea Bags		52s	R74.99	N/A	R74.99	R74.99	R78.99
Five Roses Earl Grey Tea		52s	R69.99	R59.95	R79.99	R69.99	N/A
Five Roses English Breakfast		52s	R69.99	R59.95	R69.99	N/A	R42.95

This pricing analysis was conducted at retail stores and supermarkets during w/c 5 May 2025.

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+27 (0)21 045 0202

Unit 154 B&C, Block E
19 Edison Way, Millennium Business Park
Century City
7441

info@insightsurvey.co.za

www.insightsurvey.co.za

JOHANNESBURG

+27 (0)10 140 5756

1 Wedgewood Link
Bryanston
Johannesburg
2191