

INSIGHT SURVEY
Business growth delivered

**SOUTH AFRICAN
COFFEE
INDUSTRY INSIGHTS BROCHURE**

Published: JULY 2026

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SA Market Sizing and Competitor Analysis Insights Report

An in-depth view of the market players and competitors, their latest company news in terms of products, services, marketing initiatives, the latest marketing and advertising news, products offered and social media following.

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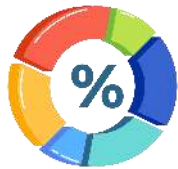
Smarter insights. Built around your customised needs and budget.



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Survey Insights

Gain strategic insights through:

- Interviews/surveys with B2B stakeholders and decision-makers
- Consumer surveys

Helping you understand:

- Market perceptions
- Purchase behaviour
- Brand loyalty and
- Factors that will drive your market share and business growth.



Quarterly Industry Intelligence Report

More than just market intelligence, the monitor becomes a **valuable knowledge-sharing tool** helping leadership teams with decision making through providing updated:

- Competitor News & Financial Results
- Product Launches
- Industry Trends
- Global & SA News & Legislation
- Innovation & Technology
- Socio-Political

The result is **clear, decision-support intelligence** that helps your business:

- Anticipate risks,
- Identify opportunities, and
- Stay ahead of market change.



REPORT OVERVIEW

The **South African Coffee Market Sizing and Competitor Analysis Insights Report (72 pages)** provides a dynamic synthesis of industry research, examining the local **Coffee Industry**, in-depth view of the market players and competitors, their latest company news in terms of products, services, marketing initiatives, the latest marketing and advertising news, products offered and social media following.



Key questions the report will help you to answer

SA Market Sizing & Competitor Analysis

- What are the current market dynamics (market size and market value): 2020-2025 Actual, 2026-2030 Forecasts?
- What is the latest company news for key players in terms of products, services, and new launches?
- How does each key player position themselves, and what are the strategic implications?
- For each key manufacturer, what are the brands and products offered?
- What is the footprint (2025 vs 2026) for each key retailer?

COMPANIES IN COMPETITOR ANALYSIS



cafféluxe



TERBODORE
COFFEE ROASTERS



McCafé

AVI



famous | brands
you're in good company



PLATŌ



SCREENSHOTS FROM REPORT

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



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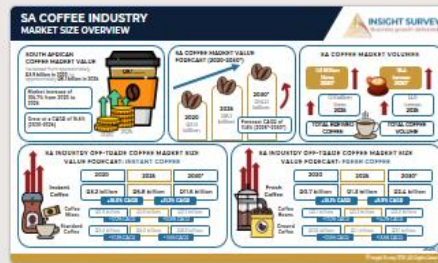
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SAMPLE FROM REPORT

AVI COMPANY NEWS



CIRO Announces Partnership with HR Retail Africa 2026

In February 2026, CIRO, an AVI Coffee brand, announced its partnership with HR Retail Africa 2026. Held at the Marriott Melrose Arch in Johannesburg, the event brought together retail and HR leaders to discuss workforce trends and industry challenges. Through the partnership, CIRO showcased its Coffee offerings while highlighting its expertise in barista training and brand partnerships. **(16 February 2026)**



Hug in a Mug Promotes a Valentine's Day Competition

In February 2026, Hug in a Mug, an AVI Coffee brand, promoted a Valentine's Day competition encouraging consumers to share a 'Hug in Every Mug' with someone special. To enter, participants were required to follow the brand, like the promotional reel, and comment on whom they would share a Hug in a Mug with. One winning pair stood a chance to receive a spa voucher for two. **(13 February 2026)**



CIRO Announced as a New Client at One Over One

In January 2026, CIRO, an AVI Coffee brand, was announced as a new client by One Over One, a digital marketing agency. One Over One stated that the partnership had already generated fresh ideas and marked the beginning of a new client relationship, adding that further developments would be shared in the future. **(16 January 2026)**



Lavazza and SPAR Bean Tree Crown a National Barista Champion

In November 2025, Lavazza, an AVI Coffee brand, and SPAR Bean Tree crowned Lesego Maphike from SUPERSPAR Vaalpark as the National Barista Champion. The competition attracted 87 baristas from across South Africa and tested their skills in espresso preparation and latte art, with Maphike also earning the opportunity to represent Bean Tree at the Lavazza Challenge. **(16 November 2025)**



Hug in a Mug Introduces its Hazelnut and Iced Creamy Cappuccino Flavours

In October 2025, Hug in a Mug, an AVI Coffee brand, introduced two new Coffee flavours, the Iced Hazelnut Cappuccino and the Iced Creamy Cappuccino. The additions expanded the brand's chilled beverage range, with the Iced Hazelnut Cappuccino featuring hazelnut flavour notes and the Iced Creamy Cappuccino offering a rich, smooth Coffee experience aimed at summer consumption. **(10 October 2025)**



CIRO Celebrates its Partner Nettari & Instabean's Achievements

In September 2025, CIRO, an AVI brand, celebrated the achievements of its partners, Nettari & Instabean, following their recognition at the Aurora International Taste Challenge 2025 and the South African Food & Beverage Awards 2025. The awards highlighted the quality of the partners' Coffee offerings while reinforcing CIRO's commitment to product excellence and industry recognition. **(16 September 2025)**



AVI Reports Growth Despite a Challenging Consumer Environment

In September 2025, AVI reported growth despite a challenging consumer environment. Revenue increased by 1%, while operating profit and headline earnings per share grew by 7.8% and 6.1%, respectively. The company's Entyce Beverages division, which includes key tea and Coffee brands, was identified as a major contributor to the group's performance. **(14 September 2025)**



CIRO Partners with Sasol Delight for The Decorex Joburg 2025

In July 2025, CIRO, an AVI Coffee brand, partnered with Sasol Delight for the Decorex Joburg 2025, held at the Sandton Convention Centre. Through the partnership, CIRO showcased Sasol Delight Coffee products, highlighting a range of Coffee offerings to cater to different consumer tastes, with the collaboration forming part of the brands' presence at the event. **(22 July 2025)**

AVI

SAMPLE FROM REPORT

MOTHERLAND COFFEE COMPANY OVERVIEW

Established in 2009, Motherland Coffee Company is a South African specialty Coffee retailer and café brand dedicated to showcasing the richness, diversity, and heritage of African Coffee.

- Inspired by Africa's position as the birthplace of Coffee and home to some of the world's most renowned Coffee-growing regions, Motherland Coffee Company was founded to elevate the profile of African Coffee while delivering authentic Coffee experiences rooted in the continent's heritage and traditions.
- Guided by this vision, the company promotes Fair Trade principles and works directly with African Coffee co-operatives and small-scale farmers, helping to create economic opportunities while supporting a more equitable and sustainable Coffee value chain.
- Operating cafés across South Africa, Motherland Coffee Company places a strong emphasis on people, community and connection. Its cafés are designed to celebrate African Coffee culture while fostering a welcoming environment that encourages social interaction and shared experiences.
- In terms of its product offering, Motherland Coffee Company provides a diverse portfolio of single-origin and blended African Coffees, complemented by a range of barista-crafted beverages, filter Coffees and iced drinks.
- Additional offerings include café-style food and packaged retail Coffee products, enhancing the overall customer experience and strengthening brand affinity.



Motherland Coffee Company
Stores:

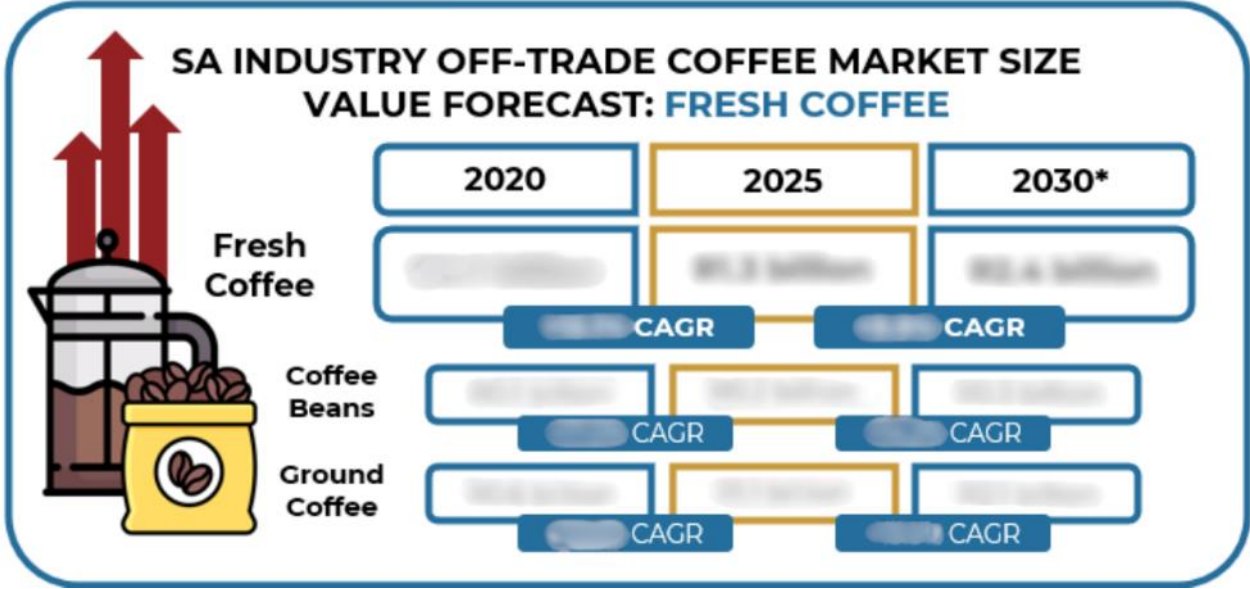
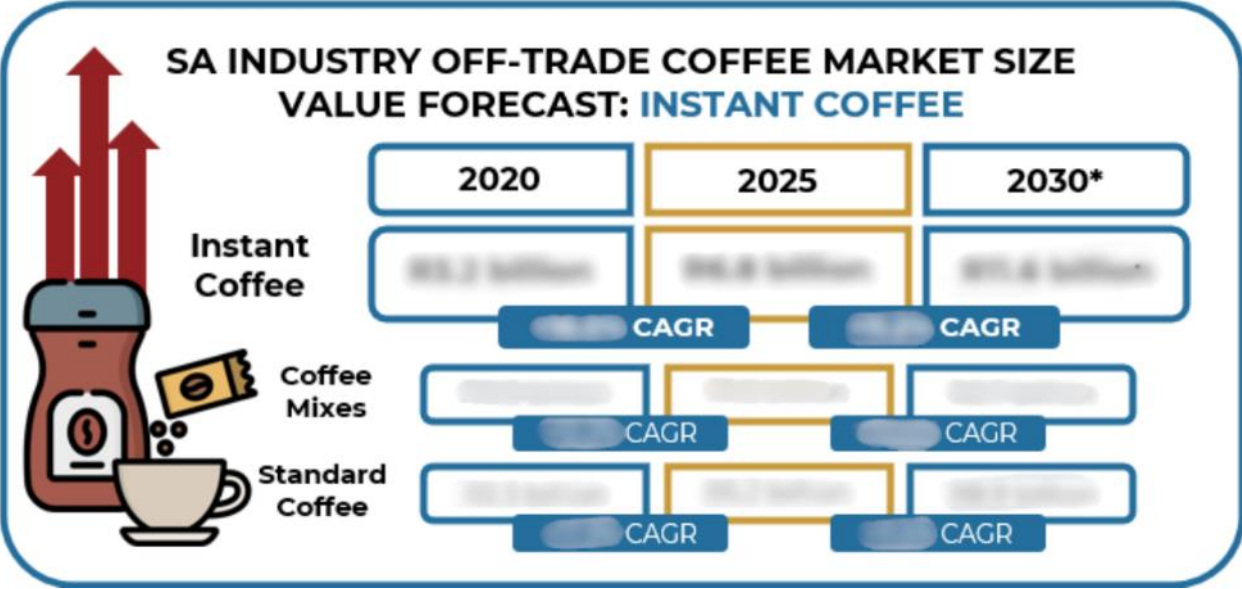
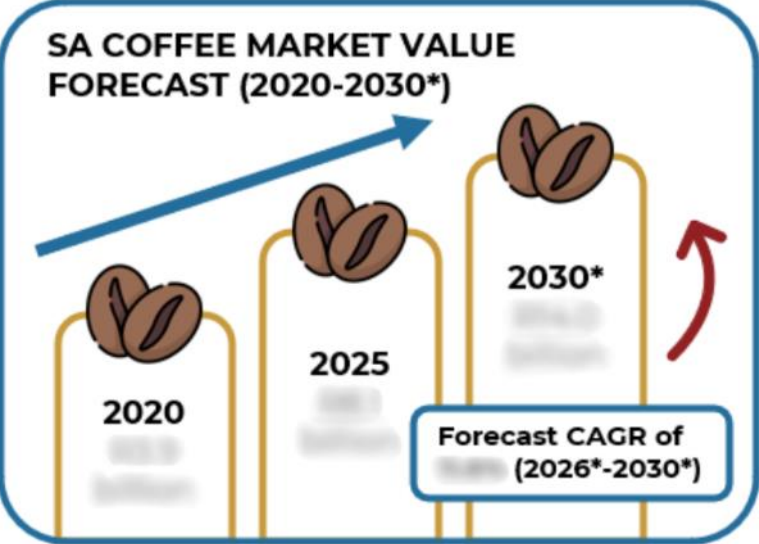
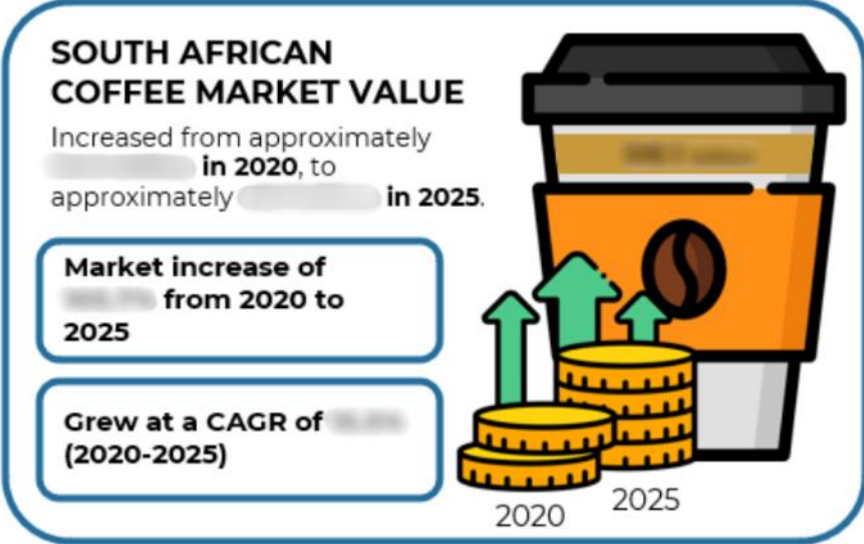
2026: 21 SA Stores
(*estimate)

			
MOTHERLAND NEIGHBOURHOOD BLEND	MOTHERLAND ORIGINAL BLEND	MOTHERLAND TOIL & TRIUMPH BLEND	MOTHERLAND ETHIOPIAN SIDAMO DECAF
R142.50 – R480.50	R142.50 – R492.50	R142.50	R146.50 – R492.50
SELECT OPTIONS	SELECT OPTIONS	SELECT OPTIONS	SELECT OPTIONS
			
MOTHERLAND COFFEE'S COFFEE PODS 10'S	MOTHERLAND COFFEE'S COFFEE PODS 50'S	HUSKEE CUP WITH LID 12OZ/350ML MC	HUSKEE CUP WITH LID 6OZ/175ML SMALL
R99.00	R520.00	R393.00	R316.00
ADD TO BASKET	ADD TO BASKET	SELECT OPTIONS	SELECT OPTIONS

*Store count obtained from company website.

SAMPLE FROM REPORT

MARKET SIZE OVERVIEW



SAMPLE FROM REPORT

FOOTPRINT: 2025 VS 2026

BRAND	2025 2026		CHANGE			% CHANGE
BRAND A		100			100	+100%
BRAND B		100			100	+100%
BRAND C		100			100	+100%
BRAND D		100			100	+100%
BRAND E		100			100	+100%
BRAND F		100			100	+100%
BRAND G		100			100	+100%
BRAND H		100			100	+100%

MARKET SIZING & COMPETITOR ANALYSIS REPORT

EXECUTIVE SUMMARY (8 Pages)

Executive Summary: Key Strategic Insights
South African Coffee Industry: Market Size
Brand Positioning Archetypes
Competitive Strategy Heatmap
Competitive Positioning Map
Category Leader Dashboard
Store Footprint: 2025 vs 2026

SOUTH AFRICAN COFFEE INDUSTRY (13 Pages)

South African Industry Overview
South African Industry Market Size: South African Coffee Market Definitions
South African Industry Market Size: South African Coffee Distribution Channel Definitions
South African Industry Market Size: Off-Trade Coffee Market (2020-2025): VALUE OF SA COFFEE MARKET: 2020-2025 (IN ZAR MILLION); SA COFFEE MARKET CAGR AND TOTAL GROWTH (IN PERCENTAGE) (Graph and Table)
South African Industry Market Size: Off-Trade Coffee Market (2020-2025: By Category): VALUE OF SA COFFEE MARKET BY CATEGORY: 2020-2025 (IN ZAR MILLION) (Table)
South African Industry Market Size: Off-Trade Coffee Market (Forecast: 2026*-2030*): VALUE OF SA COFFEE MARKET: 2025 & 2030* (IN ZAR MILLION); SA COFFEE MARKET VALUE FORECAST BY CATEGORY (IN ZAR MILLION) (Graph and Table)



MARKET SIZING & COMPETITOR ANALYSIS REPORT

SOUTH AFRICAN COFFEE INDUSTRY (CONTINUED) (13 Pages)

South African Industry Market Volumes: Total Brewed Coffee and Total Coffee Volume (2020-2030*): TOTAL BREWED COFFEE VOLUME**: 2020-2030* (IN MILLION LITRES); TOTAL COFFEE VOLUME: 2020-2030* (IN TONNES) (Tables)

South African Industry Market Volumes: Retail Cups Coffee Market (2020-2030*): RETAIL VOLUME OF SA COFFEE MARKET: IN CUPS (2020-2030*) (Table)

South African Industry Market Volumes: Foodservice Cups Coffee Market (2020-2030*): FOODSERVICE VOLUME OF SA COFFEE MARKET: IN CUPS (2020-2030*) (Table)

South African Industry Market Distribution: Coffee Market: CHANNEL DISTRIBUTION FOR COFFEE PRODUCTS: 2025 (IN PERCENTAGE); CHANNEL DISTRIBUTION (2020 AND 2025) BY OUTLET TYPE (Graph and Table)

SOUTH AFRICAN COFFEE MANUFACTURER AND DISTRIBUTOR OVERVIEW (25 Pages)

AVI: Company News

AVI: Coffee Brands/Products

Cafféluxe: Company News

Cafféluxe: Coffee Brands/Products

Caturra Africa: Overview and Coffee Brands/Products

Famous Brands: Company News and Coffee Brands/Products

Global Coffee Exporters: Overview and Coffee Brands/Products

Jacobs Douwe Egberts (JDE): Company News

Jacobs Douwe Egberts (JDE): Coffee Brands/Products



MARKET SIZING & COMPETITOR ANALYSIS REPORT

SOUTH AFRICAN COFFEE MANUFACTURER AND DISTRIBUTOR OVERVIEW (CONTINUED) **(25 Pages)**

Jumbo Brands: Overview and Coffee Brands/Products

Nestlé: Company News

Nestlé: Coffee Brands/Products

Starbucks: Company News

Starbucks: Coffee Brands/Products

Terbodore Coffee Roasters: Overview and Coffee Brands/Products

Vida e Caffè: Company News and Coffee Brands/Products

South African Coffee Manufacturers and Distributors: Other

SOUTH AFRICAN COFFEE RETAILER ANALYSIS (16 Pages)

Bean Tree Café: Overview

Bootlegger Coffee Company: Overview

Famous Brands: Mugg & Bean: Overview

Famous Brands: Wimpy: Overview

Krispy Kreme: Overview

McDonald's: McCafé: Overview

Motherland Coffee Company: Overview



MARKET SIZING & COMPETITOR ANALYSIS REPORT

SOUTH AFRICAN COFFEE RETAILER ANALYSIS (CONTINUED) (16 Pages)

Plato Coffee: Overview

Seattle Coffee Company: Overview

Starbucks: Overview

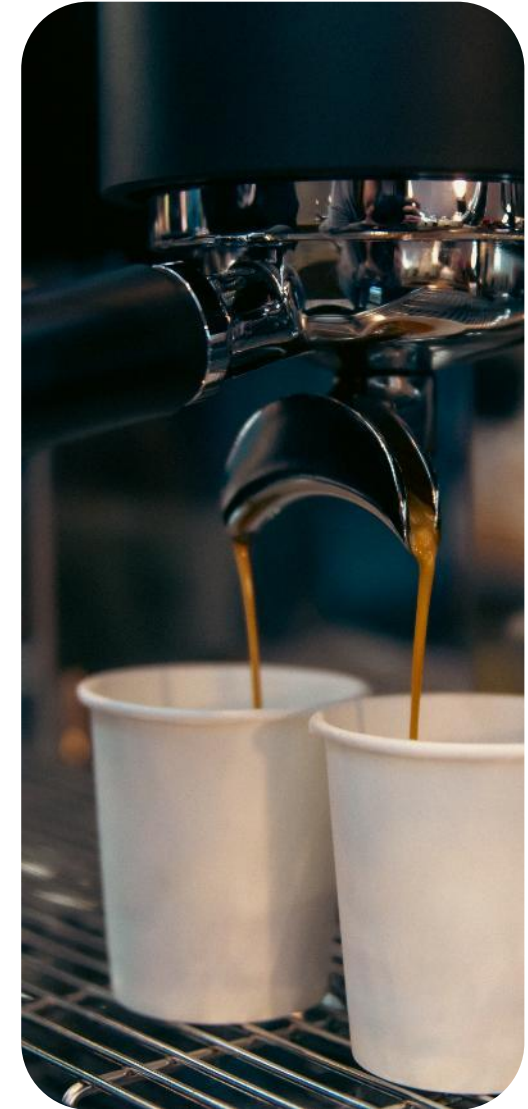
The Daily Coffee Group: Overview

Vida e Caffé: Overview

Woolworths Café: Overview

Xpresso: Overview

South African Franchised and Chain Coffee Shops: Other



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COMPANY OVERVIEW

We are a South African, boutique market research agency with 20 years of experience, specialising in **Business-to-Business (B2B) and Industry Research**. We provide bespoke solutions to deliver business growth by ensuring you make **smarter, data-driven decisions with reduced investment risk**.



Bespoke B2B Market Research Solutions



We provide **actionable insights** that deliver **business growth through customised surveys and interviews** with B2B stakeholders and decision makers.



Market and Competitor Intelligence



Our **market intelligence services** will ensure that you always stay ahead of **highly competitive South African markets**.

INDUSTRY & COMPETITOR INTELLIGENCE

Our bespoke **Industry and Competitor 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 CLIENTS



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



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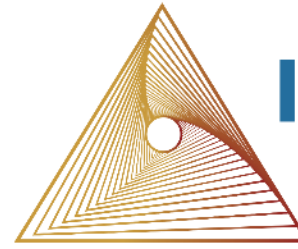
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