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SOUTH AFRICAN TEA
INDUSTRY INSIGHTS SAMPLE REPORT

Published: SEPTEMBER 2026

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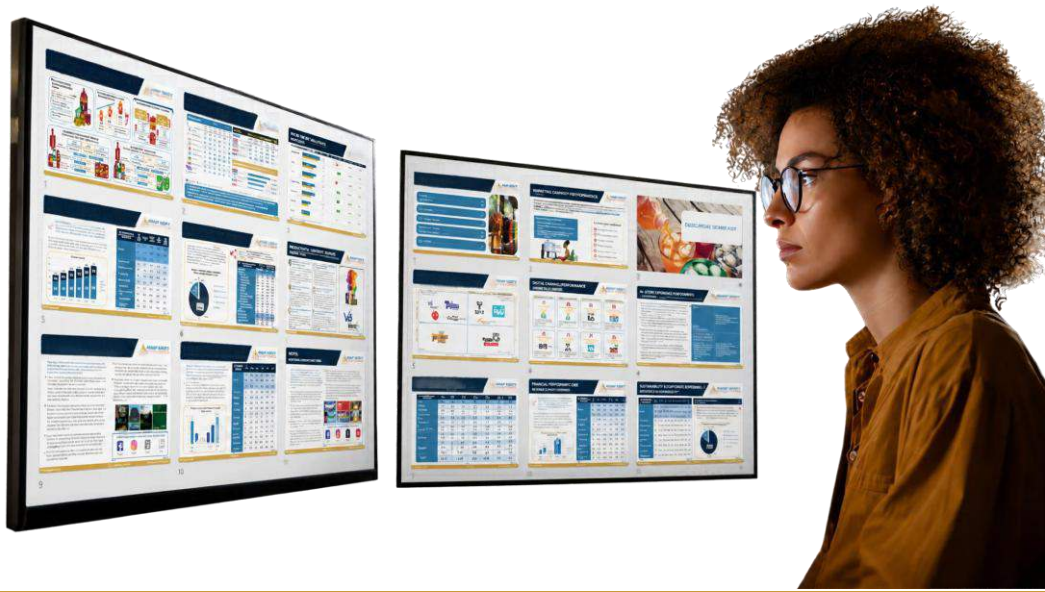
SA MARKET SIZING & COMPETITOR ANALYSIS
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The **South African Market Sizing and Competitor Analysis Insights Report** provides a dynamic synthesis of industry research, examining the local industry, in-depth view of the market players and competitors, 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

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



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COMPANIES IN COMPETITOR ANALYSIS

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SCREENSHOTS FROM REPORT

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



1



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13 ★



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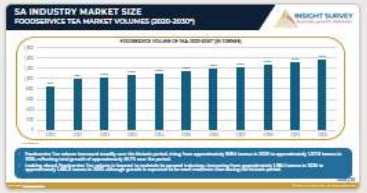
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SAMPLE FROM REPORT
CARMIÉN COMPANY NEWS

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Carmién Hosts Women's Wellness Cooking Event

In August 2026, Carmién hosted a Women's Wellness Cooking Event bringing women together for conversations, cooking and practical wellness guidance. The event featured Dr Ledivia Strauss, who shared insights on women's health and wellness, while participants also explored recipes and healthy-living tips. The event supports Carmién's women's wellness focus and Rooibos wellness. ***(11 August 2026)***

Carmién Celebrates Mandela Day with Winter Warmer Hampers

In July 2026, Carmién distributed Winter Warmer Hampers to families in Eendekuil and Clanwilliam, South Africa's rooibos growing region, as part of its Mandela Day activities. The initiative provided warmth and support to local families while reflecting on Carmién's commitment to communities where its Rooibos is grown, and colleagues, growers and partners live and work. ***(18 July 2026)***

Carmién Announces its Partnership with Springbok Cobus Reinach

In July 2026, Carmién announced its partnership with Springbok player, Cobus Reinach, positioning him as part of the Carmién Tea family and brand ambassador. The collaboration focuses on wellness, recovery and maintaining balance beyond professional rugby, with Carmién highlighting its functional Rooibos range as part of Reinach's daily wellness routine and recovery. ***(3 July 2026)***

Carmién Launches its New Rooibos Cooking Teabags

In March 2026, Carmién launched a new range of cooking teabags in collaboration with food writer Carmen Niehaus, expanding Rooibos into home cooking. The range includes a Pure Rooibos Combo Pack with red and green Rooibos cooking bags and a Spicy Rooibos Masala Chai blend with aromatic spices. The teabags can be used as a stock or steeped directly into dishes to add flavour. ***(30 March 2026)***

Carmién Launches New Ashwagandha Wellness Blend

In February 2026, Carmién introduced a new Ashwagandha wellness blend combining rooibos, ginseng, ginger and chai spices. The caffeine-free blend is positioned as an everyday wellness Tea supporting stress management and balance. The product was promoted as Made in South Africa and forms part of Carmién's expanding wellness tea portfolio. ***(25 February 2026)***

Carmién Refreshes Cranberry & Hibiscus Cold Brew Packaging

In February 2026, Carmién gave its Cranberry & Hibiscus Cold Brew a fresh new look while retaining its refreshing, fruity and floral flavour. The sugar-free rooibos and hibiscus blend combines berry flavours, dried berries and hibiscus pieces and brews to a pink-red colour. Designed for cold-water brewing, the Tea can be steeped directly in a bottle, glass or jug for everyday hydration. ***(18 February 2026)***

Carmién Celebrates Rooibos Day 2026 with Its Rooibos Journey

In January 2026, on Rooibos Day 2026, Carmién highlighted its South African Rooibos heritage, sustainable farming practices and community upliftment, while showcasing its journey from the Cederberg to global markets. The company also highlighted its product innovation, including green Rooibos, functional powders, cold brews and wellness blends. ***(16 January 2026)***

Carmién Expands South African Rooibos Presence in China

In December 2025, Carmién expanded its presence in China through Standard Bank's China Unlocked initiative, which helped the company connect with trusted importers and navigate the local market. The company highlighted the growing appeal of South African Rooibos in China, where consumers refer to it as "Bosher Cha" ("the doctor's tea"), and identified China as a key growth market. ***(5 December 2025)***

CARMIÉN™
Rooibos tea

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SAMPLE FROM REPORT
JOEKELS TEA PACKERS BRANDS/PRODUCTS

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IMAGE	PRODUCT	DESCRIPTION	IMAGE	PRODUCT	DESCRIPTION
	**Joekels Black Tea 100's**	A traditional black Tea offering, available in Tea bags and loose-leaf formats.		**Laager Pure Rooibos**	A rooibos Tea that is made using 100% pure rooibos and is naturally caffeine-free.
	**Joekels Rooibos 80's**	A naturally caffeine-free rooibos Tea offering, available in tea bags.		**Laager Tea4Kidz Rooibos**	A rooibos Tea range that is created specifically for kids. This range offers several flavours, including regular rooibos and honeybush blend, strawberry, as well as apple and berry and peach and apricot flavours with added Vitamin C.
	**Laager Green Rooibos**	A range of unfermented green rooibos, including a pure variant and a zesty Citrus & Ginger-flavoured variant.		**Phendula Tips**	An all-African Tea blend that is sourced from South Africa, Zimbabwe, and Malawi.
	**Laager Flavoured Rooibos Tea**	A flavoured rooibos Tea range that includes two flavours, namely a Mint flavoured rooibos and Chamomile, and Cranberry and Wild Cherry flavoured rooibos.		**Southall's Rooibos**	A rooibos Tea product that is produced from over 100 years of brewing history.
	**Laager Plus CBD Rooibos**	A CBD-infused rooibos Tea that supports nervous system health and restful sleep, consisting of two variants, including CBD rooibos Relax and CBD rooibos Sleep.		**Tea Time**	A full-bodied Tea blend that is sourced from South Africa and Malawi. The range also includes a naturally sweet and caffeine-free Rooibos variant.

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SAMPLE FROM REPORT
THE DAILY COFFEE CAFÉ OVERVIEW

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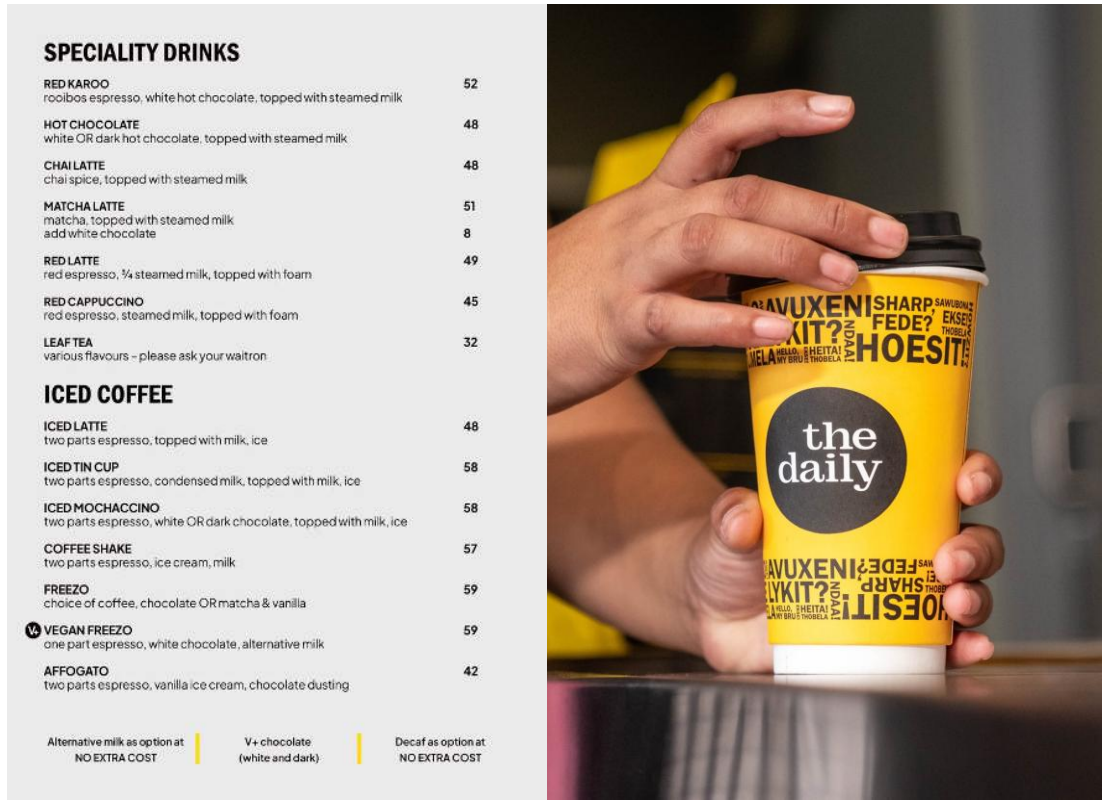
Established in 2013, The Daily Coffee Café is a South African café franchise with a growing national presence. The retailer offers a modern café experience centred around creating neighbourhood spaces where customers can connect, relax, and remain productive.

- Inspired by the café cultures of Cape Town and New York, The Daily Coffee Café's 'New-York-meets-Karoo' concept combines international café influences with local South African character, creating a welcoming café environment and in-store experience.
- Additionally, franchising remains a key component of the company's growth strategy, with The Daily Coffee Café having expanded its footprint to approximately 40 cafés throughout Gauteng, the Western Cape, Mpumalanga, Eastern Cape, Limpopo, and the North West.
- Across its franchise network, The Daily Coffee Cafés serve a broad selection of hot and cold beverages, complemented by a seasonally evolving all-day food menu.
- More specifically, its hot Tea offering includes traditional loose-leaf Teas, as well as Tea-based beverages such as Chai and Matcha Lattes. The café menu also incorporates Rooibos across specialty beverages such as Red Lattes and Red Cappuccinos, providing alternatives to traditional Tea preparations.
- Furthermore, The Daily Coffee Café's cold Tea range extends its Rooibos and Matcha offering, with options such as Fresh Red, Rooibos Shakes, Iced Red Lattes and Iced Matcha and Vanilla Lattes.

the daily

The Daily Coffee Café Stores:

2026: 40 SA Stores (*estimate)



SPECIALITY DRINKS

RED KAROO rooibos espresso, white hot chocolate, topped with steamed milk	52
HOT CHOCOLATE white OR dark hot chocolate, topped with steamed milk	48
CHAI LATTE chai spice, topped with steamed milk	48
MATCHA LATTE matcha, topped with steamed milk add white chocolate	51 8
RED LATTE red espresso, ¾ steamed milk, topped with foam	49
RED CAPPUCCINO red espresso, steamed milk, topped with foam	45
LEAF TEA various flavours – please ask your waitron	32

ICED COFFEE

ICED LATTE two parts espresso, topped with milk, ice	48
ICED TIN CUP two parts espresso, condensed milk, topped with milk, ice	58
ICED MOCHACCINO two parts espresso, white OR dark chocolate, topped with milk, ice	58
COFFEE SHAKE two parts espresso, ice cream, milk	57
FREEZO choice of coffee, chocolate OR matcha & vanilla	59
V+ VEGAN FREEZO one part espresso, white chocolate, alternative milk	59
AFFOGATO two parts espresso, vanilla ice cream, chocolate dusting	42

Alternative milk as option at NO EXTRA COST | V+ chocolate (white and dark) | Decaf as option at NO EXTRA COST

*Store count obtained from company website and telephonically.

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SAMPLE FROM REPORT
MARKET SIZE OVERVIEW

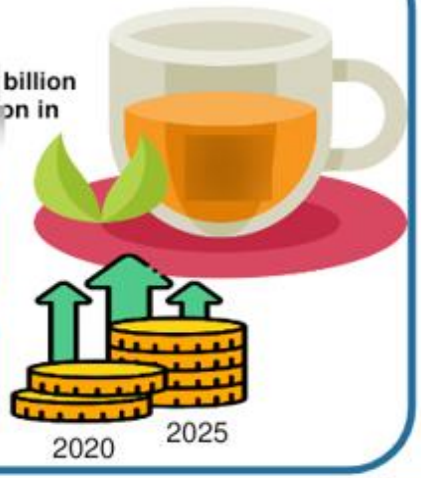
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SOUTH AFRICAN TEA MARKET VALUE

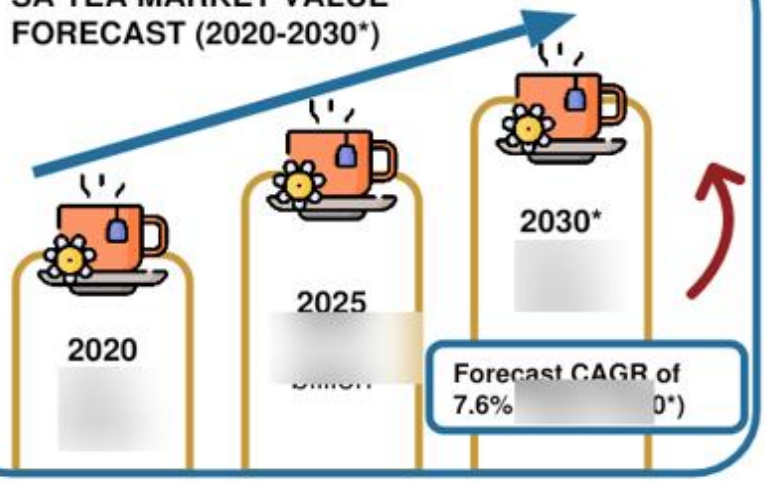
Increased from appro billion in 2020, to approxima on in 2025.

Market increase from 2020 to 2025

Grew at a CAGR (2020-2025)



SA TEA MARKET VALUE FORECAST (2020-2030*)



SA TEA MARKET DISTRIBUTION: BY RETAIL CHANNEL

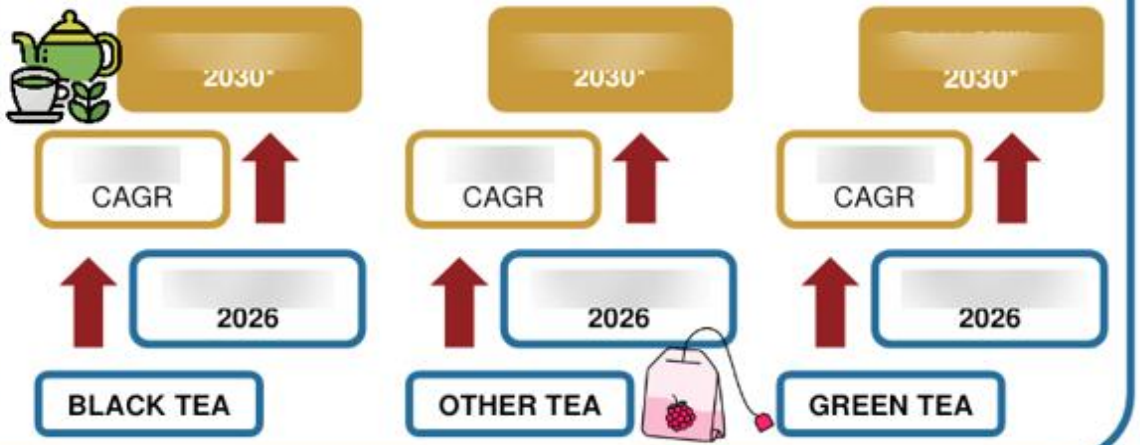


Retail E-Commerc king it the fastest growing channel.

SA TEA MARKET VALUE FORECAST BY CATEGORY

VALUE FORECAST OF SA TEA MARKET (in ZAR million)

CATEGORY	2030*
Black Tea	
Fruit/Herbal Tea	
Green Tea	
Instant Tea	
Other Tea	
Total Forecast	



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MARKET SIZING & COMPETITOR ANALYSIS REPORT

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EXECUTIVE SUMMARY (6 Pages)

South African Tea Industry: Market Size

Brand Positioning Archetypes

Competitive Strategy Heatmap

Competitive Positioning Map

Category Leader Dashboard

Tea Type Coverage Matrix

SOUTH AFRICAN TEA INDUSTRY (15 Pages)

South African Industry Overview

South African Industry Market Size: South African Tea Market Definitions

South African Industry Market Size: South African Tea Distribution Channel Definitions

South African Industry Market Size: Tea Market (2020-2025): VALUE OF SA TEA MARKET: 2020-2025 (IN ZAR MILLION); SA TEA MARKET CAGR AND TOTAL GROWTH (IN PERCENTAGE) (Graph and Table)

South African Industry Market Size: Tea Market (2020-2025: By Category): VALUE OF SA TEA MARKET BY CATEGORY (Table)

South African Industry Market Size Forecast: Tea Market (2026-2030*): VALUE OF SA TEA MARKET: 2026 - 2030* (IN ZAR MILLION); SA TEA MARKET VALUE FORECAST BY CATEGORY (IN ZAR MILLION) (Graph and Table)



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SOUTH AFRICAN TEA INDUSTRY (CONTINUED) (15 Pages)

South African Industry Market Size: Retail Tea Market Volumes (2020-2030*): RETAIL VOLUME OF SA TEA MARKET: IN TONNES (2020-2030*) (Table)

South African Industry Market Size: Foodservice Tea Market Volumes (2020-2030*): FOODSERVICE VOLUME OF TEA: 2020-2030* (IN TONNES) (Graph)

South African Industry Market Size: Retail Cups Tea Market Volumes (2020-2030*): RETAIL CUPS VOLUME OF SA TEA MARKET: IN MILLION CUPS (2020-2030*) (Table)

South African Industry Market Size: Foodservice Cups Tea Market Volumes (2020-2030*): FOODSERVICE CUPS VOLUME OF TEA: 2020-2030* (IN MILLION CUPS) (Graph)

South African Industry Market Size: Retail Brewed Tea Market Volumes (2020-2030*): RETAIL BREWED VOLUME OF SA TEA MARKET: IN MILLION LITRES (2020-2030*) (Table)

South African Industry Market Size: Foodservice Brewed Tea Market Volumes (2020-2030*): FOODSERVICE BREWED VOLUME OF TEA: 2020-2030* (IN MILLION LITRES) (Graph)

South African Industry Market Distribution: Tea Market: CHANNEL DISTRIBUTION FOR TEA PRODUCTS: 2025 (IN PERCENTAGE); CHANNEL DISTRIBUTION (2020 & 2025) BY OUTLET TYPE (Graph and Table)

SOUTH AFRICAN TEA MANUFACTURER AND DISTRIBUTOR OVERVIEW (22 Pages)

AVI: Company News

AVI: Tea Brands/Products

BOS: Overview and Tea Brands/Products

Carmién: Company News

Carmién: Tea Brands/Products



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MARKET SIZING & COMPETITOR ANALYSIS REPORT

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SOUTH AFRICAN TEA MANUFACTURER AND DISTRIBUTOR OVERVIEW (CONTINUED) (22 Pages)

Lipton Teas and Infusions South Africa: Overview
Lipton Teas and Infusions South Africa: Tea Brands/Products
Dilmah: Company News
Dilmah: Tea Brands/Products
Joekels Tea Packers: Company News
Joekels Tea Packers: Tea Brands/Products
Stafford Bros & Draeger (Pty) Ltd: Overview & Tea Brands/Products
South African Tea Manufacturers & Distributors: Other

SOUTH AFRICAN TEA RETAIL ANALYSIS (11 Pages)

Krispy Kreme: Overview
McDonald's: McCafé: Overview
Famous Brands: Mugg & Bean: Overview
Famous Brands: Wimpy: Overview
Peacock Coffee & Tea Traders: Overview
Seattle Coffee Company: Overview
Starbucks: Overview
The Daily Coffee Cafe: Overview



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SOUTH AFRICAN TEA RETAIL ANALYSIS (CONTINUED) (11 Pages)

Vida e Caffé: Overview

South African Independent & Franchised Retailers: Other



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SA COMPETITOR MARKET SHARE ANALYSIS
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The **Competitor Market Share Analysis Insights Report** provides valuable market intelligence on company and brand performance, featuring market share, retail sales and volume data for the period 2021–2025. By tracking performance over time, the report enables decision-makers to benchmark competitors, identify market share shifts, assess sales growth and understand the competitive positioning of individual companies and brands to inform strategic business decisions.

Key questions the report answer

- What is each company's market share, and how has it changed from 2021 to 2025?
- What is the market share of individual brands, and how has their position evolved?
- What are the annual retail sales of each company from 2021 to 2025?
- What are the annual retail volume of individual brands over this period?
- How does your company's and brand's performance compare with key competitors?

Sample: Market Share



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SOUTH AFRICAN INDUSTRY INSIGHTS REPORT
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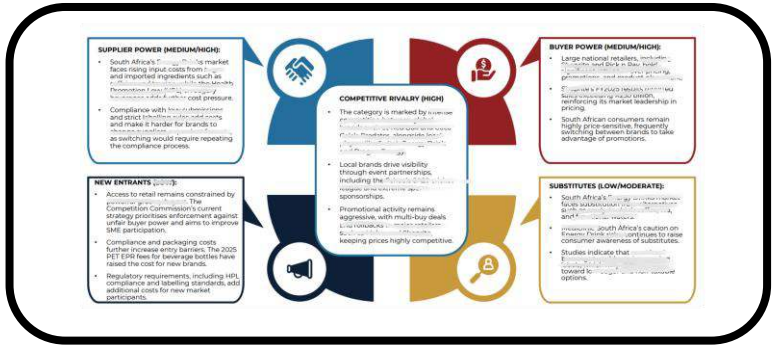
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The **South African Industry Insights Report** provides a comprehensive overview of the local market, examining the competitive landscape and key industry developments. It explores emerging trends, product innovation, technological advancements and the economic, social and regulatory factors shaping the market, highlighting key opportunities and challenges influencing future industry growth.

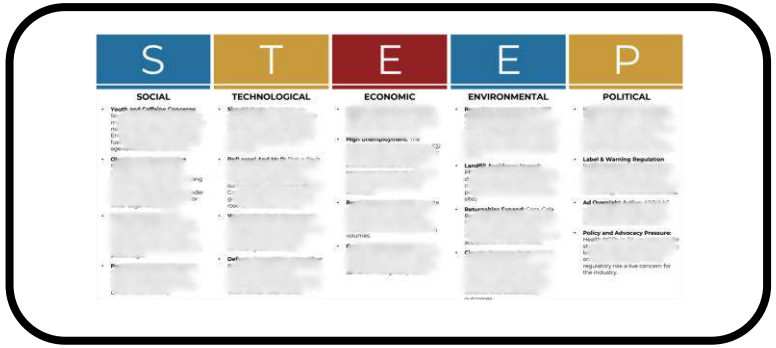
Key questions the report will help you to answer

- What is the Porter's Five Forces and STEEP analysis for the South African markets?
- What are the latest industry trends and product innovations?
- What are the key drivers shaping market growth?
- Which challenges could affect future industry growth
- What innovations and technology are shaping the South African industry?

Sample: Porter's Five Forces



Sample: Steep Analysis



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GLOBAL INDUSTRY INSIGHTS REPORT
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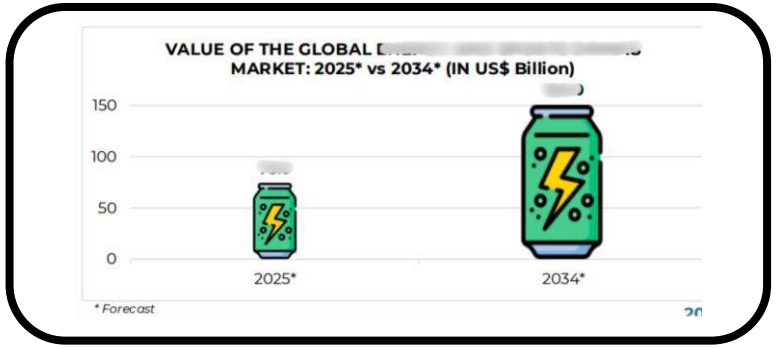
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The **Global Industry Insights Report** provides a comprehensive overview of global market dynamics, market size and growth forecasts, and key regional markets. It explores the competitive landscape, emerging consumer trends, product innovation and technological developments, alongside the key drivers and challenges shaping industry growth worldwide.

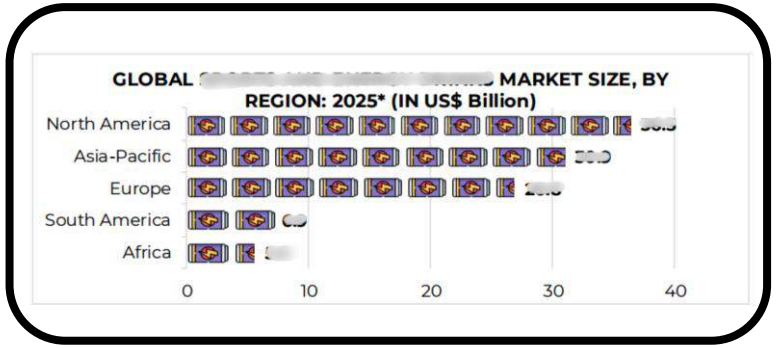
Key questions the report will help you to answer

- What are the current market dynamics of the industry?
- Which are the key markets within the industry?
- Which regions represent the largest markets, and what are the key developments shaping regional market growth?
- Which drivers and challenges could affect future industry growth?
- What innovations and technology are shaping the global industry?

Sample: Global Industry Overview



Sample: Key Markets - Regional



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PRICING ANALYSIS INSIGHTS REPORT
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The **Pricing Analysis Insights Report** provides a comparative overview of product prices across leading South African retail outlets. It examines pricing differences across retailers, brands and product sizes, offering valuable insights into market pricing, price positioning and the competitive retail landscape.

Key questions the report answer

- What are the prices of popular brands across South African retail outlets?
- How do product prices compare?

Sample: Pricing Analysis

BRAND AND SIZE			Checkers	makro	Pick n Pay	SPAR
[redacted]		[redacted]	R79.99	R73.95	R81.49	N/A
		24 x 500ml	N/A	R285.95	R310.49	N/A
[redacted]		500ml	R19.99	N/A	R19.99	N/A
		6 x 500ml	R119.99	N/A	R116.49	N/A
[redacted]		500ml	R19.99	N/A	R19.99	N/A
		6 x 500ml	R119.99	N/A	R116.49	N/A
[redacted]		500ml	R15.99	R14.95	R15.99	R15.49
		6 x 500ml	R89.99	R77.95	R94.99	R91.99
[redacted]		500ml	R15.99	N/A	R15.99	R15.49

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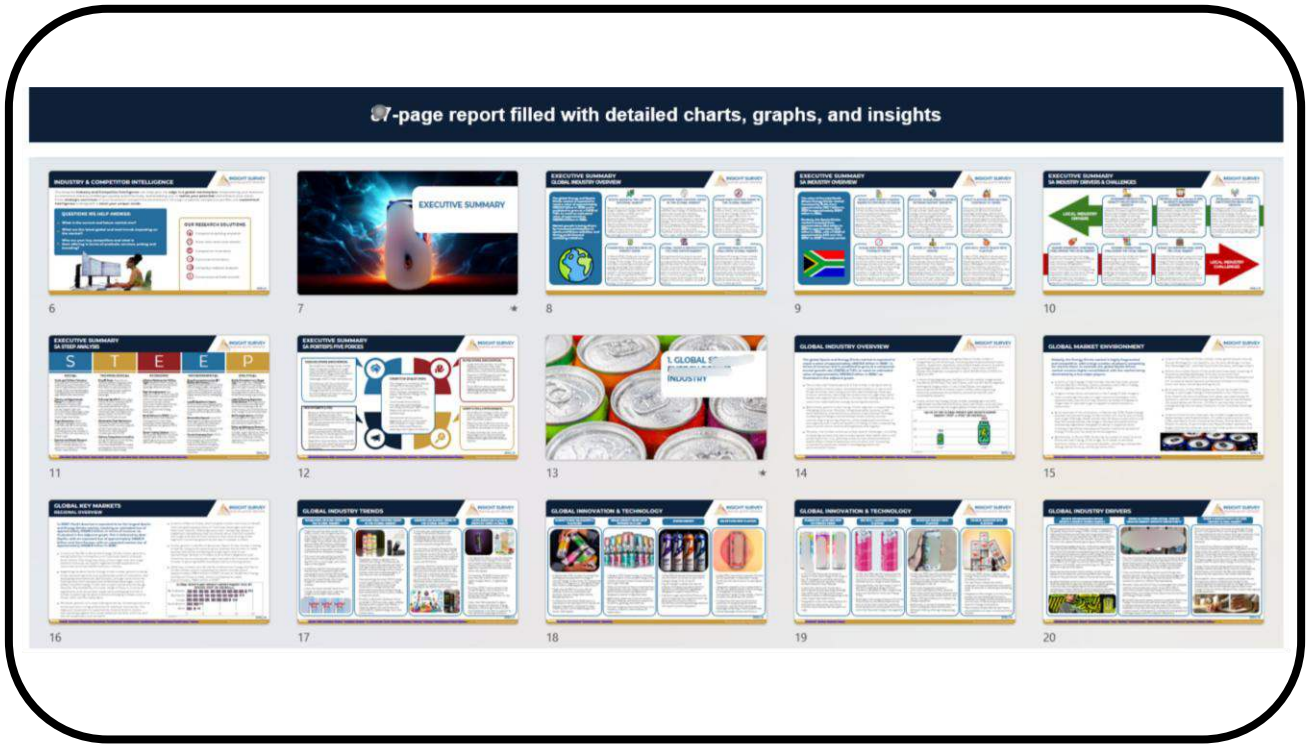
FULL LANDSCAPE INSIGHTS REPORT
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The **South African Full Industry Landscape Insights Report** provides a dynamic synthesis of industry research, examining the local and global industry from a uniquely holistic perspective, with detailed insights into the entire value chain: market size, industry trends, innovation and technology, industry drivers and challenges, manufacturer/distributor overview, flavour, and pricing analysis.

- Executive Summary
- Global Industry Snapshot
- South African Industry Snapshot
- South African Industry Drivers & Challenges
- South African Steep Analysis
- South African Porter's Five Forces
- Global Industry
- South African Industry
- SA Industry: Market Size
- South African Industry Manufacturer & Distributor Overview
- South African Pricing Analysis

Sample: Screenshot of Selected Report Slides



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COMPANY OVERVIEW

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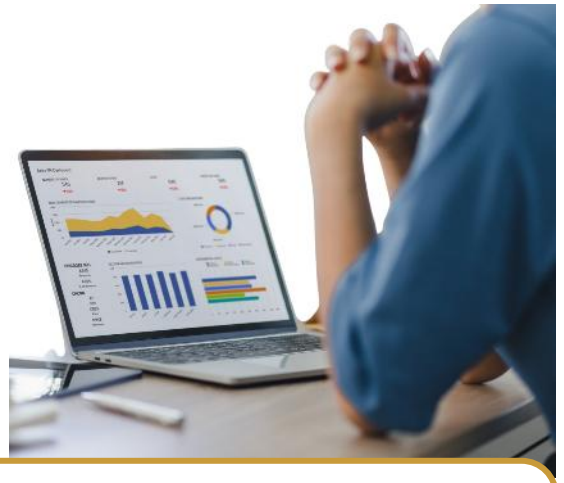
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Our **market intelligence services** will ensure that you always stay ahead of **highly competitive South African markets**.

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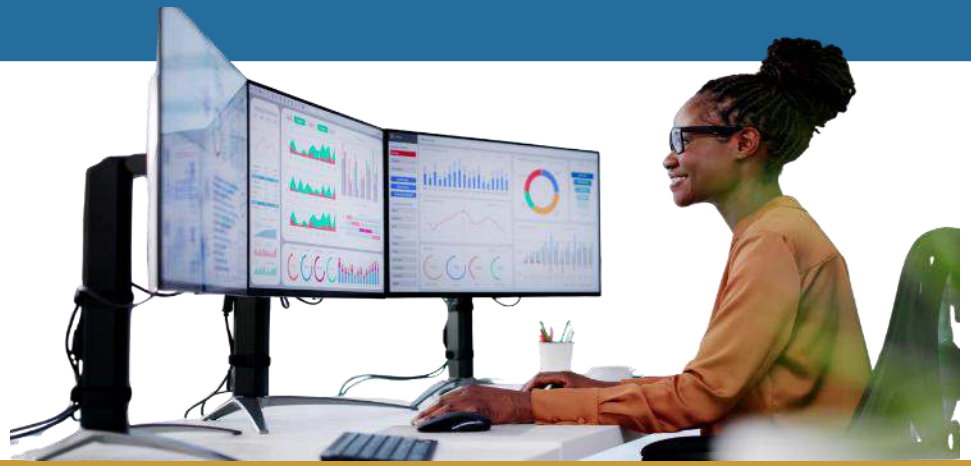
INDUSTRY & COMPETITOR INTELLIGENCE

INSIGHT SURVEY
Business growth delivered

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 are their offerings 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

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OUR FOOD AND BEVERAGE CLIENTS

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AVI

BURGER KING

THE Coca-Cola COMPANY

famous | brands
you're in good company

HUNGRY LION

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

i'm lovin' it

McCain

Nando's

Nestlé

PIONEER FOODS
REALISING POTENTIAL

Premier



RCL FOODS

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