



Euromonitor
International

Hot Drinks in Uganda

March 2026

Table of Contents

EXECUTIVE SUMMARY

Urbanisation, coffee culture and wellness trends buoy demand

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

- Coffee fuels growth
- Affordability outweighs sustainability concerns
- Health and wellness trend gains traction

WHAT'S NEXT?

- Rising middle class, urbanisation and investment in local supply chains will propel growth
- Wellness trends will increasingly shape beverage choices
- Players will embrace digital channels despite rural delivery challenges

COMPETITIVE LANDSCAPE

- Star Café Ltd is leading hot drinks player
- Local players gain traction

CHANNELS

- Traditional outlets dominate hot drinks distribution
- E-commerce sees rapid growth
- Foodservice vs retail split

MARKET DATA

- Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
- Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
- Table 3 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
- Table 4 - Retail Sales of Hot Drinks by Category: Value 2020-2025
- Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
- Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
- Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
- Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
- Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
- Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
- Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
- Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
- Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
- Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
- Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
- Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
- Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
- Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
- Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
- Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
- Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
- Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
- Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
- Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
- Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

COFFEE IN UGANDA

Key data findings

2025 developments

Instant coffee dominates as fresh formats and local investment drive growth

Industry performance

Instant coffee remains go-to choice for consumers

Fresh coffee grows in popularity

What's next?

Government initiatives will continue stimulating demand

Digitalisation will drive intensified competition

Competitive landscape

Haraka Coffee intensifies competition in instant coffee

Smaller companies challenge established players

Channels

Small local grocers continue to dominate coffee distribution

E-commerce aids product discovery

Category DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 27 - Retail Sales of Coffee by Category: Value 2020-2025

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 30 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 31 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 32 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 33 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 34 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 35 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

TEA IN UGANDA

Key data findings

2025 developments

Price pressures weigh on tea, while herbal and green varieties show resilience

Industry performance

Ugandan tea industry battles ongoing crisis

Fruit/herbal and green teas show relative resilience

What's next?

Rising health and wellness trend will boost demand

Policy reforms will drive transformation

Competitive landscape

Eagle Investments leads tea landscape

Volcafe Uganda and Kenya's Gold Crown Beverages gain traction

Channels

Small local grocers lead tea distribution

E-commerce continues to emerge

Category data

Table 36 - Retail Sales of Tea by Category: Volume 2020-2025

Table 37 - Retail Sales of Tea by Category: Value 2020-2025

Table 38 - Retail Sales of Tea by Category: % Volume Growth 2020-2025

Table 39 - Retail Sales of Tea by Category: % Value Growth 2020-2025

Table 40 - NBO Company Shares of Tea: % Retail Value 2021-2025

Table 41 - LBN Brand Shares of Tea: % Retail Value 2022-2025

Table 42 - Forecast Retail Sales of Tea by Category: Volume 2025-2030

Table 43 - Forecast Retail Sales of Tea by Category: Value 2025-2030

Table 44 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030

Table 45 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

OTHER HOT DRINKS IN UGANDA

Key data findings

2025 developments

Affordability and nutrition-led marketing sustain growth

Industry performance

Rising middle class population boosts demand

Malt-based drinks gain popularity

What's next?

Other hot drinks poised for growth through diversified offerings

Manufacturers will shift online to boost reach

Competitive landscape

Imported brands continue to dominate other hot drinks

Specialised offerings tap into niche demand

Channels

Supermarkets lead sales

Expansion of online delivery platforms boosts growth of e-commerce

Category data

Table 46 - Retail Sales of Other Hot Drinks by Category: Volume 2020-2025

Table 47 - Retail Sales of Other Hot Drinks by Category: Value 2020-2025

Table 48 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2020-2025

Table 49 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2020-2025

Table 50 - NBO Company Shares of Other Hot Drinks: % Retail Value 2021-2025

Table 51 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2022-2025

Table 52 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2025-2030

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2025-2030

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2025-2030

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2025-2030

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/hot-drinks-in-uganda/report.

