

Hot beverages & cold brew

KENCO DELIVERS IN EVERY SEASON!

OVER 13.8M
IN VALUE SALES IN
THE LAST YEAR¹



THE FASTEST
GROWING RANGE
IN THE SEGMENT²

REFRESHINGLY
ICED OR **HOT**
DELICIOUSLY

JDE Peet's instant success

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Coffee is more than just a beverage; it's a cornerstone of daily routines for millions. That cultural significance is reflected in its market performance: total coffee RSV is up 2.5% over the past year¹, now valued at over £1.6bn². Behind this growth is a clear trend: consumers want coffee-shop quality at home, and are willing to pay for products that deliver it.

"Instant coffee remains at the heart of the category and accounts for an impressive 78% of all cups consumed³," says Maria Kabalyk, head of category & shopper at JDE Peet's. This dominance shows both the scale of the opportunity and its ongoing category relevance. Driving this is a growing appetite for premium instant coffee that combines exceptional taste, convenience, and value versus out-of-home options.

"Currently worth over £1 billion, instant coffee plays a vital role with a 57% share⁴ of the total coffee category," she adds. "Kenco is a brand that continues to grow with 4.8% value growth in the past year⁵, capturing market share and driving significant category value."

JDE Peet's success stories

The premiumisation trend in instant coffee is clearly reflected in the performance of JDE Peet's portfolio, which is leading the charge. "Kenco, the first coffee brand to launch the refill format back in 2009, today commands 45% share of the instant coffee refills⁶, delivering over £25m RSV per year," reveals Kabalyk.



Instant coffee remains at the heart of the category and accounts for an impressive 78% of all cups consumed³. This dominance shows both the scale of the opportunity and its ongoing category relevance

"In January 2024, we became the first major coffee brand to switch refill packs from plastic to paper, setting a new sustainability benchmark while reinforcing our role as an innovative leader."

The focus on premium formats continues to pay off: The Grocer's latest Top Products report confirms Kenco as the biggest winner in instant coffee - adding £13.6m in value on volumes up 10%⁸. Crucially, Kenco was the only brand in the top 10 to reduce its average price, driving accessibility without compromising quality.

"As 9.4m households choose JDE Peet's instant coffee brands – including Kenco, Douwe Egberts, and L'Or – we hold three of the category's top five positions⁹," says Kabalyk.

"This combination of sustained loyalty, innovation and category leadership offers retailers and wholesalers a clear pathway to growth – capturing incremental sales, increasing basket value, and winning share in a rapidly evolving and profitable category."

Looking ahead to 2026

"As we enter 2026, we look forward to leading the category through new innovations and meaningful retail partnerships," she concludes. "Watch this space as we continue to bring excitement to the coffee aisle."

Source

¹⁻³ NielsenIQ Scantrack in Total Coverage MAT w/e 28.12.24

⁴ NIQ Scantrack Data, Total Coverage, 52W271225

⁵ Nielsen IQ Scantrack Data, 27.12.2025

⁶ +£10.4m - NIQ Scantrack data 52w to 28th December 2024

⁷ Nielsen Scantrack Data Total Coverage MAT Dec 23

⁸⁻⁹ NIQ: 52 weeks to 6 September 2025

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Analysis

Why we stopped going out for coffee

Why are consumers spending less at coffee shops but more on coffee at home? Because they're willing to pay for quality when they're the ones making it. In this category, these contradictions keep emerging and so do the opportunities.

 Nearly half of British consumers have cut back on coffee shop visits to save money¹. But they haven't stopped craving their flat whites and iced cappuccinos, they've simply moved them home.

This single behavioural shift is reshaping a market now worth almost £2bn². Consumers aren't abandoning indulgence, they're relocating it. The £4 high street latte has migrated to the kitchen, where a premium pod or sacheted speciality drink delivers a similar experience for a fraction of the price. Due to this shift the coffee category has grown to £1.8bn³, up 8.2%⁴, with 24m households now buying in⁵, with the specialities and mixes segment alone worth £246m⁶.

However, premiumisation is only half of the story. The market is simultaneously fragmenting along

generational lines. Under-35s are twice as likely as older consumers to drink iced coffee weekly⁷. Tea penetration among under-28s has collapsed from 75% to 55% in just four years⁸, yet matcha has exploded by 93% in 12 months⁹. Functional teas promising better sleep and sharper focus are growing at 12.5%¹⁰, and milk-based drinks are following that momentum. "Whilst there are ongoing inflationary pressures, milk drinks have shown themselves to be a robust and consumer-favourite product which continues to demonstrate remarkable resilience, growing +17% year on year and worth £983.3m¹¹," explains Karen Lewis, marketing director at FrieslandCampina. "Proving that affordable indulgence remains valued even as household budgets tighten," she adds.

Recreating barista experiences

This migration from high street to home has created fertile ground for brands offering café-quality products at a fraction of out-of-home prices. And the opportunity extends far beyond simply replacing a morning espresso. "Consumer trends point towards a shift in typical consumption occasions, with more people now drinking coffee outside of just a morning brew, particularly within the frothy coffee category, which over-indexes with afternoon and evening consumption," explains Maria Kabalyk, head of category & shopper, UK & I at JDE Peet's. The company's Kenco and Maxwell House brands now command 20.9% of the frothy coffee category¹², with the Kenco Iced/Hot range alone bringing 1.28m new buyers into coffee over the past year¹³. These are not



consumers switching from one brand to another, however; they are entirely new to the category – evidence that innovation is expanding the market rather than merely reshuffling existing demand. The trend extends beyond coffee itself into the equipment and accessories that make premium preparation possible. Alex Gort-Barten, owner & director at Dualit, notes: “Shoppers are increasingly conscious of what is in their cup and are actively seeking products without unnecessary chemicals, additives, or artificial flavourings. Products such as our Espresso Pro espresso machine, combined with our milk frothers and hot chocolate sachets, allow users to achieve café-grade results at home while still balancing value and premium expectations.”

Since launching its hot chocolate

range in September 2025, Dualit has sold over 26,000 units, with one major grocer alone selling more than 23,000, averaging at 1,200 units per week, he reveals. Yet amid the excitement around innovation, Marcello Canetti, managing director UK & IE at illy, cautions against chasing novelty at the expense of the fundamentals. “Whereas fads steal the headlines, consistency is key when it comes to coffee. After all, it is a daily ritual many people rely on. The majority of consumers are still looking to satisfy the need for a classic daily premium coffee that tastes delicious, rather than an over-processed concoction or functional alternative,” he explains. The brand has emerged as the UK’s fastest-growing coffee in the top 10¹⁴, with its instant range achieving double-digit growth. Recently ranked

38th across all FMCG brands in the UK’s 50 most successful growth brands for 2025, illy demonstrates that heritage and quality remain powerful differentiators, he adds. “Innovation is to be celebrated but classic coffee remains king,” he says.

The premiumisation trend is equally evident in pods and capsules, with seven in 10 UK coffee drinkers saying they’re willing to pay more for quality¹⁵. L’Or capitalised on this shift, with its capsules report a 27.4% increase in value¹⁶, while L’Or Barista has recorded a 13% volume growth¹⁷. Their latest offer, Absolu, is made up by 18 possible drink creations, from iced coffees to indulgent milky options using a milk frother, allowing consumers to personalise intensity to taste.

JDE Peet’s continues to dominate the single-serve segment, holding

Analysis

a 40.3% value share as the No.1 manufacturer in the category¹⁸. With pods, Tassimo leads with a 50.7% share¹⁹, while L'Or and Costa have expanded their combined capsule share by 4.1 percentage points to 22.2%²⁰. "This strong household reach presents retailers with an opportunity to drive incremental sales by leveraging JDE Peet's brands as a gateway to a premium, coffee-shop-quality experience at home," explains JDE's Kabalyk.

Make it instant

If there's one segment that defies conventional assumptions about the coffee market, it's instant. Long dismissed for its poor relation to beans and ground, instant coffee is experiencing what many in the industry are calling a renaissance. Instant accounts for 76% of all in-home coffee cups consumed²¹. "There's a perception that instant coffee is in decline, but the data doesn't support that," notes Helena Hills, co-founder and CEO of TrueStart Coffee. "What's changed is what shoppers expect from it." TrueStart has grown ahead of the market, with NIQ panel data showing that 55% of its revenue is incremental, meaning it is bringing new shoppers into coffee rather than simply cannibalising existing purchases. The company has attracted over 250,000 new shoppers in the past year alone reveals Hills. "Instant is being rediscovered as a smart, modern choice rather than a compromise," she says. "Consumers are now actively reassessing it through a different lens – taste, versatility and everyday ease."

Currently, the instant category is driven by consumer demand for quality, convenience and differentiated offerings. "We see a growing opportunity for premium instant coffee products that deliver rich, indulgent taste with minimum fuss while also costing significantly less per drink than your typical coffee shop order," explains JDE's Kabalyk. Whether through premium ingredients or accessible formats, instant coffee is proving that convenience and quality do not need to be mutually exclusive.

Iced drinks and ready-to-drink

While hot coffee remains the backbone of the category, the most dramatic



growth is happening in cold formats. Iced coffee has evolved from a seasonal novelty to a year-round staple, driven largely by younger consumers, whose relationship with coffee looks fundamentally different from previous generations. Among under-35s, 33% consume iced coffee weekly, compared to just 17% of those aged 35 and over²². "Ready-to drink (RTD) iced coffee cans are now the fastest-growing soft drinks sector²³, fuelled by Gen Z and Millennials with a thirst for premium convenience, authenticity, and innovation," explains Stuart Wilson, founder of Lost Sheep Coffee. "At Lost

RTD Iced coffee cans are now the fastest-growing soft drinks sector, fuelled by Gen Z and Millennials with a thirst for premium convenience"

Sheep, our RTD iced coffee cans are ground-breaking as they are roaster-led, meaning full coffee traceability from farm to can. You can really taste the difference: unlike other milk-based coffee cans, ours are smooth, with zero bitterness." He sees the next frontier in coffee concentrates, which allow consumers to create café-style iced drinks at home without specialist equipment or barista skills. It's a format that bridges the gap between RTD convenience and the customisation that at-home preparation allows for. "In the UK, the RTD iced coffee category has shown good growth, up 4.6% in value sales and 5.7% in volume sales²⁴," explains Tracey Mattock, marketing manager at Finlays. "The growth is driven by flavoured iced coffees, predominantly dairy lattes or caramel-flavoured lattes." Still emerging as a distinct segment, it both caters to health-conscious consumers and product



Wellness in a cup

The tea category's modest 1.6% value growth to £780.8m in the latest 52 weeks²⁵, masks significant dynamism beneath the surface, with certain segments dramatically outperforming while traditional formats face harder times. The standout performer is matcha.

"Matcha tea and powder is now worth £10.4m and surging by an extraordinary 97% year-on-year²⁶," explains Jonny Briscoe, general manager UK & Ireland at Lipton Teas and Infusions. "To help retailers capitalise on this momentum, Pukka launched a larger 40-teabag

format of its Supreme Matcha Green, in a larger 40-teabag format," he adds.

But matcha is just one expression of a broader shift towards functionality. Consumers expect their tea to do more than simply taste good, they want it to support their wellbeing. Functional teas have grown 12.5% in value as shoppers turn to herbal infusions for digestion support²⁷, better sleep and everyday balance. "Health, wellness and functionality are increasingly central to tea purchasing decisions," explains Franck Ramonet, director sales Southern & Western

Europe at Yogi Tea. "Consumers are seeking teas that support digestion, immunity, sleep, focus and overall balance."

The wellness opportunity extends into stress relief – a need that has only intensified in recent years. "Stress is the number one health concern of 35- to 50-year-old consumers²⁸, and within the top three concerns of all other age groups alongside sleep and immunity²⁹," notes Ali Wilde, marketing director at The Herbtender. "Function is winning over flavour in growth, driven by nearly two-fifths (39%) of Britons

now consuming functional drinks³⁰," she adds. "Consumers seek science-backed evidence behind the products they buy for wellbeing."

The generational dynamics in tea mirror those in coffee, though with a more concerning undertone. "Only 55% bought into tea in 2025 versus 75% four years ago³¹," notes Lipton's Briscoe. Yet what younger consumers do buy is changing fast; in out-of-home settings, one in six tea purchases by under-25s last year were cold or iced tea³². This does not suggest that young people are abandoning tea, but that they're engaging with it differently.

developers navigating sugar concerns, she says. "Cold brew is renowned for its naturally sweet, rich flavour and less acidity than an iced coffee," adds Mattock. "These attributes are interesting customers who are developing iced coffees and considering sugar tax implications. Cold brew can help create a finished RTD with incredible depth of flavour but without the need for high levels of additional sugar or sweetener."

RTD tea is showing plenty of signs of optimism too. "Matcha is now a staple on coffee shop menus" explains Finlays' Mattock. "In the same way that out of home iced coffee drinks have translated to retail formats we are also seeing the same trend with matcha, which is now available in various formats within the supermarkets," she adds. "From a broader tea perspective, whilst matcha has grabbed the headlines in 2025, RTD tea itself is seeing a resurgence."

Supply chain challenges

Behind the category's positive growth story lies a more complex reality of supply chain volatility and cost pressures. Coffee prices have experienced significant fluctuations, cocoa costs have challenged chocolate-based beverages and even matcha faces supply constraints as demand outpaces Japanese production capacity. "The biggest challenge in coffee over the past year has been volatility, both in price and availability," notes TrueStart's Hills. "Extreme weather events, supply chain disruption and ongoing geopolitical pressures have made forward planning far more complex, with inevitable implications for pricing and product development timelines." TrueStart has leaned on long-standing supplier relationships, some dating back to the company's earliest days, which provide visibility and mutual trust. Meanwhile, illy's approach centres on its sustainable

business model, long-term contracts with producers and paying on average 30% more than market price creates supply security while aligning with the brand's B-Corp certification. And Finlays' Mattock explains that being part of a global tea and coffee business with dedicated buying teams helps secure supply and maintain flexibility even in more volatile conditions.

For smaller players, however, differentiation becomes the harder path. "Using high-quality, organic and medicinal grade herbs can be a challenge, especially with some of the adaptogens we use, so we work with the best, most established and experienced UK suppliers to ensure a sustainable and responsible supply chain as we scale," explains The Herbtender's Wilde.

"Supply chains across tea, herbs and cocoa remain under pressure due to climate volatility, geopolitical instability and rising costs, impacting

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both availability and pricing," agrees Yogi's Ramonet. "Own-label competition is intensifying, particularly as retailers focus on value," he adds. Yogi addresses this by investing in long-term supplier partnerships, regenerative agriculture and ethical sourcing.

During the well-known matcha supply frenzy, "demand for matcha continues to outpace production in Japan, creating supply constraints and driving the need to diversify sourcing. Across the sector, brands are exploring high-quality crops from other regions to maintain consistency, concludes Lipton's Briscoe.

Capturing the next generation

"Younger consumers are highly trend-aware and expect brands to move quickly, whether that means introducing something entirely new to the shelf or translating emerging trends into accessible at-home formats," explains Justin Burbage, commercial director, at RH Amar – UK distributor for Dunkin. "These trends are born on social media, where new coffee styles, flavours and rituals can gain traction at pace," he adds. "Consumers are looking for Instagram-ready products, so we've also worked hard with our RTD range to ensure our colour palette and packaging has strong aesthetic appeal," explains Lost Sheep's Wilson. "It's vital that the quality and the aesthetic match up," he points out. "It's all very well having a visually appealing can, but if the coffee doesn't stand up to scrutiny, customers won't be coming back."

On the other hand, face-to-face connection retains its power even in our digital age. "We invest heavily in getting coffee into people's hands and meeting consumers face-to-face, because that's where trust is built fastest," explains TrueStart's Hills. JDE Peet's parkrun partnership illustrates how strategic collaborations can reach younger demographics through shared interests. Running has experienced a resurgence among Gen Z, more than a third of UK entries for the 2025 London Marathon came from people aged 18 to 29³³, and associating with that community has delivered a 23% increase in new shopper recruitment for Kenco.

Yogi Tea has found that its purpose-led positioning resonates naturally with



younger shoppers through storytelling and influencer partnerships focused on wellbeing. "Behind the scenes, AI plays a growing role in supporting trend analysis, insight generation and product development, helping us innovate faster while staying closely aligned with all emerging needs," points out Yogi's Ramonet. Gifting as well continues to be a major opportunity for the tea category. It allows brands to move beyond everyday consumption and connect with consumers on a more emotional, meaningful level. "Our Tea Discovery box is designed with this in mind," explains Tracey Wakelin, global head

“It is time for a shake-up for true wellness brands doing tea, not tea brands doing wellness”

of marketing at Ahmad Tea.

"It's a curated collection of 15 blends spanning black, green, decaf, fruit and herbal infusions," she adds. "It invites exploration, adds value to shelves, and helps retailers unlock year-round occasions. It plays a bigger role in how consumers engage with tea, not just as a beverage but as an experience to be shared."

Predictions for 2026

"The brands that truly win will be those that pair genuinely great taste with clear values, thoughtful experiences and products that feel good to choose," notes TrueStart's Hills. In the hot space, after years of being underestimated, instant is reclaiming its place as a legitimate choice rather than a compromise.

In cold coffee, meanwhile, premiumisation is accelerating. Lost Sheep's Wilson sees a shift away from high street brands offering low-grade



The battle for shelf space

As consumers navigate cost-of-living pressures, the question of branded versus own-label has surfaced once again. Common knowledge might suggest that tough economic times favour private label, but the evidence from hot drinks tells a more nuanced story. In tea, own-label has actually lost ground.

"In the latest 52 weeks, private-label teas have seen a value decline of 1.4% and a volume decline of 1.9%³⁴," explains Lipton's Briscoe. "In the fruit & herbal segment, private label experienced a 0.9% value share decline."

These figures suggest consumers are

not simply defaulting to the cheapest option, they're making active choices about quality and value.

For functional products, certification and credible claims create barriers that own-label struggles to replicate.

"Our strategy is to elevate the herbal tea offer by providing clear and certified health claims because consumers seek science-backed evidence behind the products they buy for wellbeing," explains The Herbtender's Wilde.

However, emotional connection matters too. "Superior quality, 100% organic ingredients,

trusted functional benefits and a strong emotional connection rooted in purpose and sustainability, elements that are difficult to replicate through own-label alone," notes Yogi Tea's Ramonet.

Meanwhile, in the coffee space, "own-label continues to play a role in the category, particularly at the value end of a price-sensitive market," points out TrueStart's Hills.

"But coffee isn't a purely price-led purchase, consumers continue to choose brands that they trust to deliver consistently on taste, energy and quality," adds TrueStart's Hills.

For a daily ritual product, the risk of disappointment from an unfamiliar option may outweigh the modest savings.

And the major players continue investing heavily in their brands to maintain this advantage.

"We understand that with an increase in price comes an increase in consumer expectations," says JDE Peet's Kabalyk. "And we believe it is vital that we continue to invest in our market-leading brands and products, ensuring they remain relevant and aligned with evolving consumer needs," he concludes.

coffee cans laden with sugar, towards challenger brands offering high-quality coffee with greater traceability, more functional benefits and less sugar. "This will be the year that RTD coffee really takes off, with dairy based drinks leading demand," explains Lost Sheep's Wilson. Cold brew will play an important role as brands seek to differentiate on quality. Tea points towards functionality. Yogi Tea's Ramonet predicts that "functional, purpose-led teas will increasingly outperform the wider category," while Lipton's Briscoe expects tea to benefit as high coffee prices make it an attractive category expansion. As alternative formats grow, universally recognised brands can act and bring shoppers to fixtures they might otherwise ignore. "Growth in coffee alternatives, particularly matcha and potentially herbal, mushroom-based, or functional drinks, which appeal to consumers looking beyond traditional

coffee," points out Dualit's Gort-Barten. "It is time for a shake-up for true wellness brands doing tea, not tea brands doing wellness," says The Herbtender's Wilde.

The hot drinks sector in 2025 presents a picture of resilience and transformation. Despite significant international difficulties, the category continues to grow in value. Quality has become non-negotiable across every price point and format in each segment. The boundaries between occasions are blurring, with iced coffee competing with soft drinks and functional teas replacing supplements.

Premium experiences are no longer simply found in coffee shops or specialist retailers. Consumers can access café-quality beverages without leaving their kitchens. Retailers must invest in quality and recognise that the hot drinks aisle offers opportunities for growth across every demographic and day occasion.

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The story behind every cup

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How to help

To support Ahmad Tea's profit-share programme and its other initiatives to rebalance the tea industry, contact the UK sales team or Zahra directly



As a family-owned tea business enjoyed in more than 90 markets, Ahmad Tea marks its 40th anniversary with pride in the journey it has taken and a clear sense of responsibility for the future of tea. Built on long-term relationships in tea-growing regions, the business continues to focus on quality, fairness and resilience across the tea chain. Tea is still largely picked by hand, and in many tea-growing regions that work is carried out mainly by women. Their skill and experience shape the quality of tea, yet they have historically received the smallest share of its value. Addressing that imbalance requires practical action in the tea gardens where tea begins.

Hand picked profit shared

That action takes the form of Hand Picked Profit Shared, a direct profit-sharing programme designed to share value more fairly with tea workers. Working closely with tea gardens and local partners, the initiative enables transparent, digital payments to reach workers directly, supporting greater financial inclusion and economic independence.

"That money helped us a great deal. Some of our children are still studying and we need to pay tuition fees and transport because their school is far. My wish for the future is only that my son can get a good job," explains Julie Konda, tea picker and profit-share recipient.

In 2025, the programme scaled significantly. 12,242 tea workers received profit-share bonuses across key sourcing regions including India, Kenya and Sri Lanka. In Sri Lanka, working with IDH – the Sustainable Trade Initiative, profit-sharing payments helped close the living wage gap for workers by 75%, linked to the tea sourced from a partner plantation. These outcomes are designed to be measurable and scalable.

Quality that shares value

The relevance of this work has been recognised beyond the tea sector. In 2025, Hand Picked Profit Shared was nominated for a Grocer Gold Award,



Julie Konda,
tea picker and
profit-share
recipient



“For retailers, initiatives like Hand Picked Profit Shared respond to growing expectations around transparency and ethics, while remaining grounded in commercial reality”

highlighting its credibility with retailers and buyers seeking responsible sourcing that stands up to scrutiny. The programme also builds on Ahmad Tea's wider sustainability credentials, following the company's receipt of the King's Award for Enterprise in Sustainable Development in 2024.

"For retailers, initiatives like Hand Picked Profit Shared respond to growing expectations around transparency and ethics, while remaining grounded in commercial reality," explains Zahra Afshar, head of sustainability at Ahmad Tea. "As our company enters its fifth decade, we are keener than ever to invest in programmes that support quality, resilience and fairness across the tea chain."

To learn more about Hand Picked Profit Shared, visit ahmadtea.com/handpickedprofitshared or contact the Ahmad Tea UK team.



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ENJOYED IN OVER 90 MARKETS WORLDWIDE



Tea Discovery Selection
15 Blends. 90 Teabags.

A curated selection of black, green, fruit and herbal teas, expertly blended to suit every moment of the day.

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Hot drinks go premium

DETAILS

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Coffee & Beverage Preparation
Dualit Espresso Pro
Espresso Machine
Dualit Milk Frothers
Hot Chocolate
Dualit Hot Chocolate Sachets - including Classic Milk Chocolate and Salted Caramel
Dualit Hot Chocolate Makers



Over the past year, Dualit has continued to build on its reputation for quality, reliability and British manufacturing, while expanding into fast-growing hot drinks segments that resonate strongly with today's consumers. "The brand's evolution has been driven by a clear understanding of how people now enjoy hot drinks at home," explains Alex Gort-Barten, owner & director at Dualit. "The line between café and kitchen has blurred. Consumers want indulgence, quality and convenience, but they also want reassurance about what they are consuming. That has shaped how we develop products and flavours." A significant development has been the introduction of Dualit's Hot Chocolate Sachets. Designed to deliver a café-style experience at home, the range reflects growing demand for premium hot chocolate, with consumers increasingly willing to trade up for better taste and texture. The success of the launch has reinforced the opportunity within grocery for products that feel indulgent but accessible.

Crucially, Dualit's position as a UK manufacturer underpins its ability to move quickly. With in-house technical expertise and product development capabilities, the business can respond rapidly to emerging trends and flavour preferences. "Having design, engineering, factory and development expertise under one roof allows us to innovate faster than many competitors," says Gort-Barten. "That agility is a real advantage for retailers looking to keep their hot drinks offer fresh and relevant."



“For retailers, Dualit's focus on quality, innovation and British manufacturing offers reassurance in an increasingly competitive category”

Throughout 2026, Dualit plans to continue supporting its brand through strong partnerships with key suppliers and distributors, alongside a renewed focus on face-to-face engagement. Trade shows and in-person meetings remain a priority, particularly in a category where demonstration and tasting can make a real difference.

Ambitions for 2026 and beyond

Looking ahead, Dualit has clear ambitions for the year. New product launches planned for the second quarter are designed to complement the existing range, encouraging consumers to build complete at-home hot drinks set-ups. Flavour development will remain central, with Dualit closely monitoring trends such as matcha-based drinks and alternative brews that appeal to younger, more experimental consumers.

"We're seeing growing curiosity around alternatives to coffee," says Gort-Barten. "For retailers, Dualit's focus on quality, innovation and British manufacturing offers reassurance in an increasingly competitive category. By combining trusted appliances with consumables that deliver genuine café-style results, the brand is well-placed to support continued growth across hot drinks in 2026 and beyond."



Dualit®

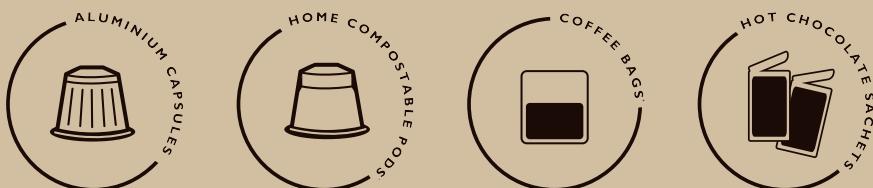
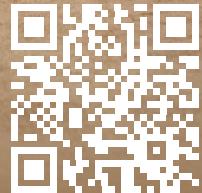


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Brewing purposeful wellbeing

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Brand Director

KEY BRANDS

Yogi Tea



Over the past year, Yogi has entered an exciting new phase, evolving from a trusted heritage brand into a future-forward global wellbeing leader, while remaining firmly rooted in its mission to inspire and enhance everyday life, reveals Franck Ramonet, director sales southern & western Europe. "As a mission-led, independent company owned by a non-profit organisation, Yogi grows in rhythm with nature, people and communities," says Ramonet. "Today, Yogi proudly serves over 1.57bn cups of tea each year. With 480 items, 250 distributors in 50 countries, production facilities in Europe and the US and packaging in 11 languages, Yogi stands as the No.1 global wellness tea brand¹."

Unified global strategy

A major milestone for the brand in 2025 has been the development of a unified global strategy, setting the stage for a bold new packaging design that will begin arriving on shelves from spring 2026, notes Ramonet. "This evolution creates the foundation for a global legacy brand, delivering stronger shelf standout, clearer product navigation, and enhanced taste appeal through vibrant, natural colours and distinctive storytelling," he adds.

Throughout 2026, Yogi will support retailers with an omnichannel



“Yogi’s ambitions for 2026 focus on accelerating growth, with impact through innovation in the most relevant functional hot tea segments”

marketing approach designed to build anticipation and drive performance as the new packaging rolls out. This includes impactful in-store communication, POS materials, sampling, hyperlocal retail media and community-led experiences that bring the brand to life.

Building on a successful first year, Yogi will also continue its partnership with Park Yoga, a collaboration that brings wellbeing into local communities and natural spaces through accessible outdoor yoga experiences.

Digitally, Yogi will invest across social, search, influencer partnerships and retail media to engage contributors at every stage of their journey. A new global website will be the home of the Yogi community, offering rich content focused on ingredients, emotional benefits, and functional wellbeing. Trade support materials also ensure retailers are fully equipped to activate the brand both in-store and online.

Looking ahead, Yogi's ambitions for 2026 focus on accelerating growth, with impact through innovation in the most relevant functional hot tea segments, explains Ramonet. "NPD will target key wellbeing need states, including Relax & Sleep, Energy & Focus, Women's Health, and Fruity Indulgence," he reveals. "Exciting innovations in the pipeline are designed to support uninterrupted sleep, mental restoration, menopause wellbeing and indulgent flavour discovery, each crafted with Yogi's trusted Ayurvedic expertise, 100% organic ingredients, and clean-label formulations."



Source

¹ Euromonitor 2025 and Nielsen Sell out rolling 2025

March
2026

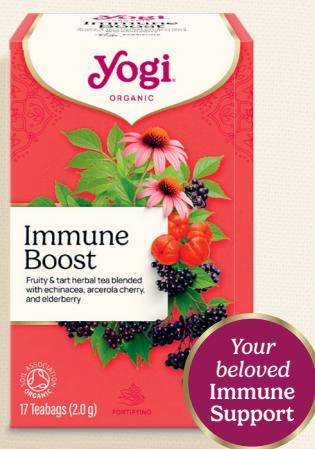
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Yogi

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Head of Sales
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Business Development Manager
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Marketing Manager

KEY PRODUCTS

Ingredient formats (bulk packaging)
Aluminium cans
PET bottles
Bag-in-box and pouches



Bring your ambition and we'll guide the way, is our approach at Finlays Solutions, says Tracey Mattock, marketing manager. "With deep insights and expertise, we partner with private label and branded coffee and tea customers to bring differentiated iced beverage products to market," she says. "From quality and sustainability – we combine our wealth of resources to deliver an unparalleled customer experience. Throughout 2025, Finlays Solutions has continued to focus on this approach and the behind-the-scenes role it plays in supporting brands and retailers to help them develop delicious, iced beverages."

Finlays' main focus for 2025 was to develop its own cold brew coffee portfolio, which in turn has meant it is now able to offer more solutions for its customers with this emerging product. "We have been working with customers on cold brew projects and have developed a number of exciting packaged solutions, which we hope to see in the market in 2026," says Mattock. "We are well equipped to offer customers a range of cold brew coffees both in concentrate and ready-to-drink formats and we welcome new enquiries from both existing and prospective customers."

Finlays Solutions is producing its cold brew coffee from a multi-million-pound facility in the UK, its first cold brew manufacturing site outside the US. Since its commission, production at the site continues to grow with its cold brew coffee generating high customer interest and praise from across Europe.

"Our focus for 2026 will be to



“Our focus for 2026 will be to continue building our cold brew business and bring more cold brew solutions to customers in the UK and Europe”

continue building our cold brew business and bring more cold brew solutions to more customers in the UK and Europe," explains Mattock. "Ultimately, we want Finlays Solutions to play a pivotal role in making our premium-quality cold brew a staple in households and ensure that more consumers have the opportunity to enjoy this premium coffee experience in multiple formats and solutions.

"We welcome customers to bring us ideas, questions and inspiration and, in return, we'll bring our deep expertise in market trends, consumer insights and the newest innovations to inform strategic decisions and product development," she adds.

"As a global business we are supported by a talented R&D team who have the skills to help respond to challenging customer briefs. We will continue to help customers develop the best flavours and formulations that meets the needs of their end-consumers, be that with a coffee or tea-based iced beverage."

In May, Finlays Solutions is attending the Private Label Manufacturing Association (PLMA) trade show in Amsterdam where it will showcase its solutions and the versatility of its offer. "We hope to meet many existing and new customers at the event and ensure that customers leave inspired by how we could work together and partner."



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Marketing Director

KEY BRANDS

Chocomel
YAZOO
Barista

Strong consumer demand for indulgent at-home experiences continues to fuel an expanding, year-round market for hot chocolate. Chocomel, Europe's number one chocolate drink¹, perfectly capitalises on this, driving sales with its versatile hot or cold appeal.

Chocomel has evolved from a niche product to one of the fastest-growing brands in the category, achieving an impressive +225% growth over last three years² and now valued at over £10.3m in retail sales value³. "This growth has been primarily driven by attracting a new wave of shoppers who are engaging with the at-home treat occasion and are looking for great-tasting, indulgent experiences," says Karen Lewis, marketing director at FrieslandCampina. "It also presents a significant opportunity for retailers to boost sales in a category that has long underperformed its potential for premium growth."

"We know that 75% of shoppers enjoy little treats like hot chocolate at home⁴, but a common frustration with traditional powder-based hot chocolate is the hassle of preparation, leading to an inconsistent taste and texture," explains Lewis. "Chocomel can be simply heated up to enjoy as a hot chocolate, making it an easy way to treat yourself with its consistent indulgent taste."

"Our insights show a large percentage of UK consumers are inclined to purchase Chocomel as a hot chocolate option, which shows that shoppers are actively willing to pay a premium for a guaranteed superior and convenient hot chocolate experience that delivers perfect consistency every time," she adds.

Unlocking the at-home treats

Since its launch, Chocomel is already outselling many more established brands, with a +60% repeat rate vs the wider category⁵. "Our 750ml format directly caters to shoppers seeking a high-quality, consistent hot chocolate option year-round," says Lewis.

The 750ml carton has proven to be a significant growth driver, with



“We are not just reaching new buyers but unlocking consumption moments and driving overall category value, aiding flavoured milk fixture visits all year round”

an impressive 69% of its purchasers being entirely new to the category⁶, she says. "This demonstrates its ability to generate purely incremental sales, effectively expanding the hot chocolate market rather than simply shifting existing demand," she adds. "By growing Chocomel within consumers' repertoires for both hot and cold occasions, we are not just reaching new buyers but unlocking new consumption moments and driving overall category value, aiding flavoured milk fixture visits all year round."

Investment in 2026

Last year the company invested heavily in the Chocomel brand, carrying out extensive research which found that a resealable bottle variant was the most desired format amongst consumers⁷, and that this significantly enhanced the Chocomel drinking experience by offering greater flexibility and convenience, explains Lewis. "As a result, we shifted from a 250ml can to a 300ml bottle format instead, which is projected to drive a 28% sales increase for the brand," she says. "We'll continue to support this new format launch into 2026."

"Chocomel is a brand with real potential, and throughout 2026 we'll continue to invest in the brand with further marketing initiatives."

Source

¹ Nielsen, MAT June 2023 for NL, BE, DE, UK, HU

² NIQ, Total Coverage, Value Sales, YTD w/e 05.10.24

³ Coverage GB 52 w/e 12.07.25
4 Worldpanel by Numerator Usage Foods, time taken to prepare evening meal 52 w/e June 2025 vs 52 weeks ending December 2017

⁵ NIQ Grocery Mults, Value ROS, Latest 52 w/e 28.12.24

⁶ dh Shop Switching and Trial and Repeat report: 1823725 & 1823661 & 1823677

⁷ 2024 Segmentation Research, carried out by See Research on behalf of Friesland Campina, n = 2000



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Allison Jouanneau
Head of Home
Channels UK & IE

KEY BRANDS

illy Classico & Decaffeinato
Roast Coffee
illy Arabica Selection
Brasile Cerrado Mineiro
(All available in beans,
ground, capsules)
illy Classico & Decaffeinato
Instant Coffee
illy Cold Brew Classico
Iced Coffee

Source

¹ Circana Italy | HM+SM+Sss |
MAT Dec 2025
² Circana UK, HM+SM+Sss, YTD
Nov 2025

 illy is Italy's No.1 premium coffee brand¹, a family run coffee brand founded in 1933. While heritage underpins the brand, illy is future-facing. Today, illy is the UK's fastest-growing coffee brand in the top 10², for the 11th month in a row, driven by consistent innovation and a laser-sharp focus on quality. Quality and sustainability have been embedded into the business since day one. "This commitment enables us to deliver a premium everyday coffee experience that consumers trust and return to," says Marcello Canetti, managing director UK & IE.

illy's experts have crafted the creation of the unique, Arabica blend, using the top 1% of beans. "While coffee trends come and go, classic quality builds long-term customer loyalty. In a crowded market of over-processed products and complex health claims consumers continue to value the simple pleasure of a velvety, high-



“While coffee trends come and go, classic quality builds long-term customer loyalty”

quality cup of Arabica coffee,” adds Canetti. A new capsule format of the Brasile Regenagri 100% regenerative agriculture certified coffee launches this year and Instant has seen double-digit growth. Long-term producer partnerships, sustainability investment and paying farmers 30% above market rates strengthen supply and give retailers added confidence.

UK's FASTEST GROWING COFFEE BRAND

WITHIN THE TOP 10 COFFEE BRANDS**



DISCOVER THE SIGNATURE TASTE OF ITALY'S No.1 PREMIUM COFFEE BRAND*



Introducing Aussie-style iced coffee

DETAILS

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Stuart Wilson
Founder

KEY PRODUCTS

RTD Iced Coffee Cans
Iced Coffee Concentrates
Beans and Ground Coffee
Home Compostable
Nespresso® Pods
Decaf Coffee



Lost Sheep Coffee's mission is to take Aussie-style craft coffee mainstream, reveals founder Stuart Wilson. "Gone are the days when craft coffee was only for those with expensive home coffee machines" he says. "As a brand, we're changing the game."

First up, the brand is challenging the RTD coffee market with its Iced Coffee Cans – Iced Latte, Iced Caramel Latte and Iced Mocha – that boast coffee traceability from farm to can. "Farm-to-can coffee traceability is unheard of in the mainstream RTD market," says Wilson. "Our cans are made with our award-winning 'Get to the Hopper' coffee blend, crafted from Brazilian and Guatemalan beans that are traceable right back to the coffee farms."

"What sets us apart from the competition is the fact we're the coffee roasters," he adds. "Every single bean that goes into our cans is hand-roasted by us in Kent, hot-brewed and flash-chilled into our cans. It's a full barista



“What sets us apart from the competition is that we're the coffee roasters”

experience at the shake of a can."

Alongside RTDs, Lost Sheep is leading the charge for another trending format – at-home Iced Coffee Concentrate (aka coffee squash).

"A few years ago, people wouldn't have dreamt of putting craft coffee into RTD cans or concentrates. Today, as iced coffee pioneers, we're leading the way," he concludes.



CRAFTED BY COFFEE ROASTERS
FARM TO CAN COFFEE TRACEABILITY

Brewing innovation with teas

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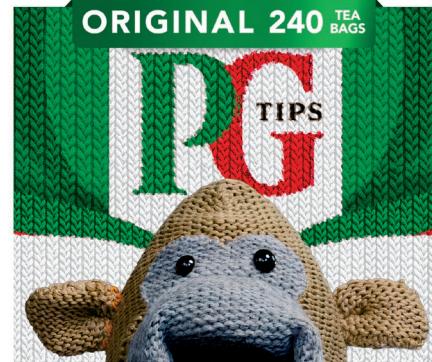
KEY BRANDS

Lipton
Pukka
PG Tips



At Lipton Teas and Infusions, our vision is simple yet powerful: we create value for everyone, in every sip, from plant to cup, says Jonny Briscoe, general manager UK & Ireland. "With over 150 years of heritage and a proud commitment to UK manufacturing, we redefine the tea experience for today's consumers across the globe. United by purpose, our teams work together to deliver distinctive, meaningful benefits to millions of tea lovers worldwide.

"But our purpose goes far beyond the cup," he notes. "It's about improving livelihoods in tea-growing regions and safeguarding natural resources for generations to come. Today, consumers prioritise health and wellness benefits, clean labels free from ultra-processed ingredients, and low-calorie yet natural options. Tea is perfectly positioned to meet these needs: it is affordable, healthy and comforting – and demand rises, particularly as coffee prices remain high. "We also see strong momentum in functional teas and matcha, which resonate with younger demographics," adds Briscoe. "This dynamic market enables our diverse portfolio to deliver on evolving consumer preferences." PG Tips, a true British icon, is on a mission to bring love and warmth back to the category. PG Tips' household penetration has increased from 6.4% to 7%¹, reinforcing



Source

^{1,2} NIQ Discover to 29.11.25
Total Tea - Total Coverage



“Lipton’s new hot range is positioned to reinvigorate the fruit and herbal tea category with five exciting new blends”

our ambition to become the nation's No.1 tea brand once again². "Our premium, wellness-focused brand, Pukka, addresses key consumer needs such as digestion, sleep and calm with its ethically sourced blends. As a testament to our commitment, Pukka buys 18% of the total 4% of organic herbs globally³, and all our products are fair trade certified under the Fair For Life Standard and FairWild certified," Briscoe explains. "Rounding out our portfolio is the vibrant new Lipton hot range, which sets out to shake up the fruit and herbal tea category." Lipton's five new blends – made with 100% natural ingredients, real fruit pieces, and eco-friendly packaging are crafted to appeal to younger consumers. This range transforms fruit and herbal tea into an explosion of feel-good flavours. "Through continuous innovation, a commitment to quality and a balanced focus on both traditional favourites and emerging trends, Lipton Teas and Infusions remain dedicated to driving growth across the entire tea category."

LIPTON

Teas and Infusions

pukka

LIPTON

PG TIPS



Creating Value for Everyone, in every sip.



Next-generation herbal teas

DETAILS

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Co-Founder
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Paul Byrne
Sales Director

KEY BRANDS

The Herbtender
Organic Herbal Teas:
And Breathe – Calm
Good Morning – Vitality
Good Night – Sleep
Pure Focus – Focus
Vital Glow – Immunity



With 2026 key trends around longevity, functional hydration brain and gut health, consumers are seeking additional benefits to their food and drink, to reduce their caffeine intake and buy healthier alternatives.

The branded offer has been stagnant for a few years, so now it is the perfect time to refresh and elevate your functional tea range. “Our wellness-focused brand brings a fresh take on tea for health-seeking consumers,” explains Ali Wilde, marketing director, The Herbtender. “Having been involved in accelerating the retail growth of wellbeing brands such as Pukka and Naturya, The Herbtender team believe it is now time for a new kid on the block to pick up the wellness mantle.”

Founded on the therapeutic quality of medicinal grade herbs and their beneficial compounds for full functional flavour. The Herbtender is elevating the herbal tea offer with trending adaptogens such as lion's



“It is now time for a new kid on the block to pick up the wellness mantle”

mane, ginseng, reishi, liquorice and holy basil, paired with other functional herbs such as turmeric, hibiscus, lemon balm, rose, chamomile and ginger, adds Wilde. “With strong high street presence and a £1m investment in marketing for 2026, including partnerships with Ferne Cotton’s Happy Place and influencer Liz Earle Wellbeing, we’re looking to extend our range with exciting NPD.”

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A new force in coffee

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Simon Hills
Co-Founder and
Managing Director
India Rawlin
Head of Brand

KEY BRANDS

TrueStart's Barista Grade
Instant Coffee 100g
Energising Colombian
Beans 200g
Energising Colombian
Coffee Bags, 25 Bag Pouch

Source

¹ Internal figures, 2024-25
² NIQ Panel, 52 w/e 4th October 2025
³ NIQ Panel, 52 w/e 4th October 2025
⁴ Shopmium Survey, Oct 2025



TrueStart Coffee has hit a turning point. After a decade of championing great-tasting, premium coffee that fits into everyday life, the brand has delivered a breakout year.

In 2025, the brand delivered 140% YoY growth¹ and was recognised by FEBE as the fastest-growing coffee brand in the UK, reflecting its momentum. NIQ reports 55% of TrueStart's in-store sales² are incremental to the category, showing they recruit new shoppers rather than shift existing spend. As Helena Hills, co-founder & CEO, explains: "From day one, our focus has been on building a long-lasting, trusted brand – offering products and ranges that genuinely perform on taste, health and energy and make space work harder for retailers." Early loyalty is equally strong; after nine months on-shelf TrueStart is achieving a 22% loyalty rate³, almost double the category average. With ambitions to double the



At TrueStart we're obsessed with bringing taste, health and energy to coffee"

business again over the next 12 months, TrueStart will focus on experience.

"80% of shoppers intend to repurchase TrueStart after first taste⁴, so sampling remains a powerful growth lever," notes India Rawlin, head of brand.

As Hills concludes: "At TrueStart we are obsessed with making our customers feel good, fitting effortlessly into their lives with easy to make, great tasting, healthy coffee."

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Senior Brand Manager
– Dunkin', RH Amar

KEY BRANDS

Dunkin'

One of the most recognisable coffee brands in the world, Dunkin', has partnered with UK distributor, RH Amar, to launch its retail coffee range – bringing the Dunkin' name and iconic coffee flavours to UK grocery fixtures.

"Dunkin' offers an exciting opportunity for retailers to bring something fresh and fun to shelves and in doing so engage new shoppers," explains Justin Burbage, commercial director, RH Amar.

The iconic pink and orange Dunkin' packaging brings colour and personality to coffee aisles, and the UK retail line-up has been designed to include some of Dunkin's classic flavours alongside trend-led flavours. The launch range includes seven Nespresso compatible pods, including the Original Dunkin' Blend alongside popular flavoured options such as Vanilla and Caramel. There are also three Dolce Gusto compatible varieties, including Cappuccino and Caramel Latte, offering indulgent, coffee-shop-style experiences at home. Completing the range is packaged ground coffee. "This range is all about delivering that special Dunkin' experience at home," says Rebecca Cook, senior brand manager, Dunkin', RH Amar. "Whether it's a quick morning pick-me-up or a cosy creamy coffee later in the day, the range brings the unmistakable Dunkin' fun and flavour into people's homes."

"Universally recognised brands such as Dunkin' can act as positive disruptors," adds Burbage. "With its playful personality and trend-led flavours, we believe that Dunkin' can expand the appeal of coffee pods beyond current consumers – including engaging with younger shoppers."



“Whether it's a quick morning pick-me-up or a cosy creamy coffee later in the day, the range brings unmistakable Dunkin' fun and flavour into people's homes”

"These younger shoppers, including Gen Z and younger Millennials, are key Dunkin' consumers globally. They are highly trend-aware, influenced by social media and motivated by a growing 'treat culture'." Dunkin' has built strong engagement with these younger audiences by spotting trends early and delivering a fun and fresh uniquely Dunkin' proposition. Trend-led flavours such as Dunkin's much-loved Caramel and Vanilla varieties resonate strongly with this younger demographic. Both are crafted using Dunkin's Original Blend, with Vanilla offering a smooth, sweet profile and Caramel delivering a rich, creamy caramel indulgence. The Caramel variant is just as enjoyable served hot as it is poured over ice, tapping into the growing popularity of refreshing iced coffees. For those seeking a true coffee-shop experience at home, Dunkin's frothy, creamy Cappuccino provides an anytime treat, delivering barista-quality taste with unmistakable Dunkin' character. And then there's the Original Blend itself – Dunkin's iconic signature coffee, first introduced in 1950 and still loved today for its smooth balanced flavour."



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