

Coffee on Amazon India sells at least ₹152.6 crore a year. Indian D2C brands take 11%, and they sell cheaper than Nescafé.

COFFEE · AMAZON INDIA, BLINKIT, FLIPKART AND 13 ROASTERS' OWN STORES · READ 2026-10-13

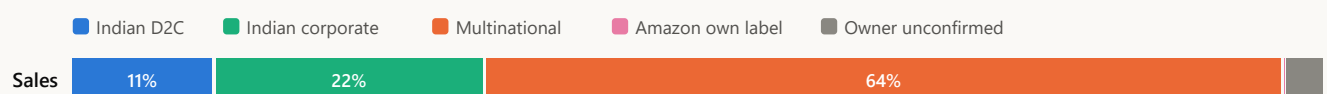
One aisle holds two kinds of buyer. Instant coffee is a habit, bought the same way for decades. Specialty coffee, beans and ground, is researched: origin, roast and grind. India now has a large group of D2C roasters built for the second buyer. We wanted to know where the money is.

The measure. Sales on Amazon India: the “bought in past month” figure at its lower bound, times the product-page price, times twelve. Read on 2026-10-13, during Amazon’s festive sale. Blinkit and Flipkart publish no sales figures: for them we count products, stores and prices, and never add them to the Amazon money.

1 · THE SHORT VERSION

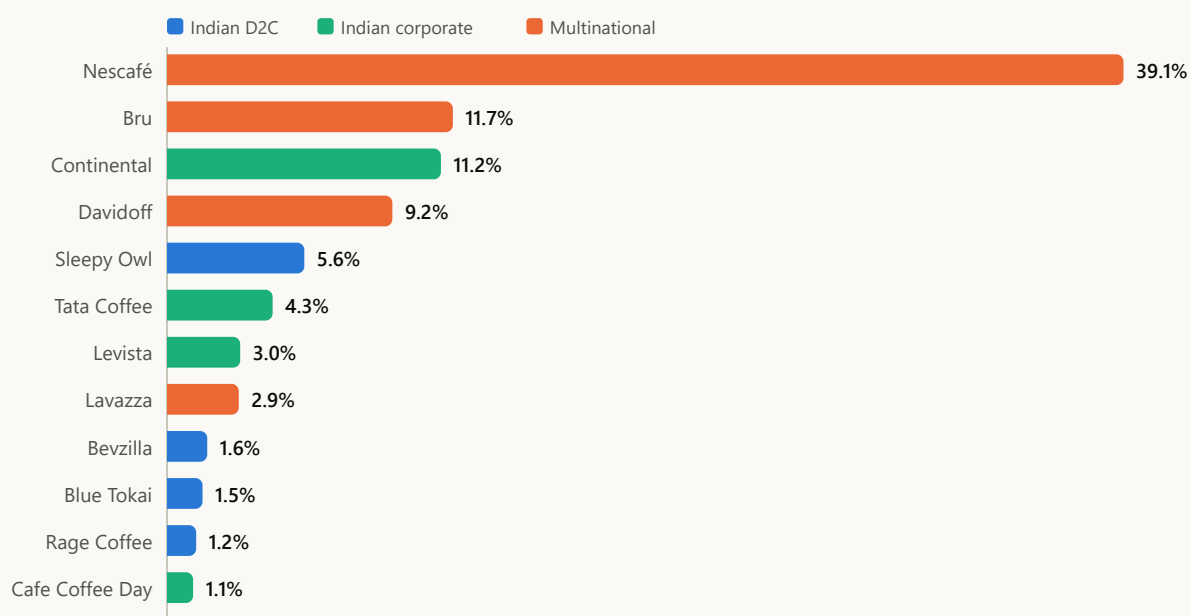
- Coffee on Amazon India sells at least **₹152.6 crore a year**, about 326,350 packs a month.
- **Nescafé alone takes 39.1%.** With HUL’s Bru, two multinationals take 50.8%. All foreign-owned brands take 63.7%.
- **Indian D2C brands take 11.4%.** Sleepy Owl is the largest at 5.6%.
- **Instant coffee is 82.6% of the money.** Whole beans are 7.8%.
- **The D2C brands are not the premium end.** Their median coffee costs ₹260 per 100 g, against ₹368 for Nescafé and Bru. The premium end is Davidoff, at ₹849.
- On their own sites the roasters sell beans and ground coffee (53% of products). On Amazon, 69% of their sales is instant.

2 · WHO SELLS IT ON AMAZON



OWNER GROUP	SHARE OF SALES
Indian D2C	11.4%
Indian corporate	21.6%
Multinational	63.7%
Amazon own label	0.1%
Owner unconfirmed	3.2%

Indian D2C brands take 11.4%, and up to 14.6% with the smaller brands whose owner is not confirmed. Indian companies that are not D2C (CCL's Continental, Tata Coffee, Levista, Café Coffee Day) take 21.6%.

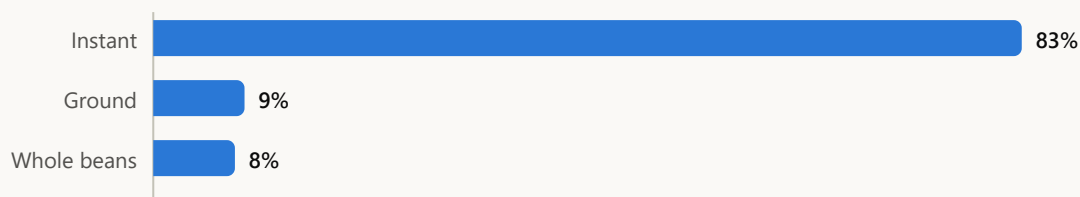


BRAND	OWNER	LISTINGS THAT SELL	PER 100 G	SHARE	SALES A YEAR, AT LEAST
Nescafé	Multinational	46	₹400	39.1%	₹59.7 crore
Bru	Multinational	17	₹333	11.7%	₹17.8 crore
Continental	Indian corporate	21	₹213	11.2%	₹17.1 crore
Davidoff	Multinational	9	₹849	9.2%	₹14.1 crore
Sleepy Owl	Indian D2C	24	₹376	5.6%	₹8.6 crore
Tata Coffee	Indian corporate	13	₹356	4.3%	₹6.6 crore
Levista	Indian corporate	15	₹150	3.0%	₹4.6 crore
Lavazza	Multinational	8	₹191	2.9%	₹4.5 crore

Bevzilla	Indian D2C	10	₹166	1.6%	₹2.5 crore
Blue Tokai	Indian D2C	10	₹263	1.5%	₹2.2 crore
Rage Coffee	Indian D2C	10	₹310	1.2%	₹1.8 crore
Cafe Coffee Day	Indian corporate	12	₹90	1.1%	₹1.6 crore

The top three take 62.0%. Nescafé sells under five store names on Amazon (Nescafe, NESCAFÉ Sunrise, NESCAFÉ SUNRISE, Nescafe Gold and Nestlé); counted together it has 46 listings that sell. Davidoff, owned by Germany's Tchibo, is fourth with 9 listings: ₹14.1 crore a year from glass jars of instant coffee.

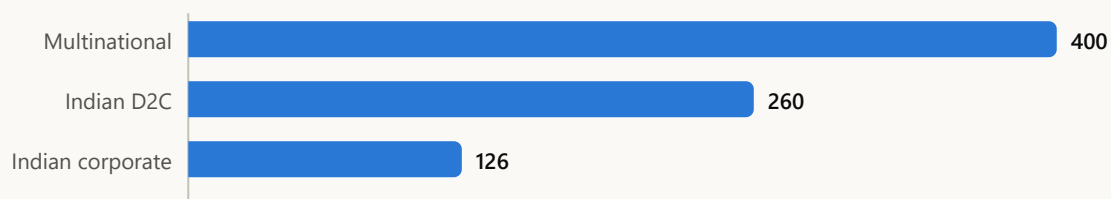
3 · INSTANT IS THE SHELF



We take the type from Amazon's own category, not from the title. Instant coffee is 82.6% of the money, ground coffee 8.7% and whole beans 7.8%. Ready-to-drink and cold brew together are under 1%. No capsule listing shows sales.

4 · THE D2C BRANDS SELL CHEAPER THAN NESCAFÉ

Median price per 100 g of coffee, in rupees. Premixes (3-in-1, cappuccino and cold coffee mixes) are left out: they are mostly milk and sugar.



OWNER GROUP	ALL COFFEE	INSTANT ONLY	LISTINGS PRICED
Multinational	₹400	₹467	75
Indian D2C	₹260	₹349	65
Indian corporate	₹126	₹210	89

The median D2C coffee costs ₹260 per 100 g. Nescafé and Bru together cost ₹368. Within instant coffee alone the order is the same: multinational ₹467, D2C ₹349. Amazon prints its own price per 100 g on each product page, and that figure gives the same order.

The premium shelf is imported instant. Davidoff costs ₹849 per 100 g, 3.3 times the median D2C coffee. The roasters price their Amazon coffee between the Indian mass brands and the imports.

5 · WHAT THE ROASTERS SELL ON AMAZON, AND ON THEIR OWN SITES

Indian D2C sales on Amazon, ₹17.4 crore a year, by type of coffee; beside the 346 coffee products on 13 D2C roasters' own websites whose type we can name.

TYPE	SHARE OF D2C SALES ON AMAZON	SHARE OF PRODUCTS ON OWN SITES
Instant	69%	10%
Beans or ground	26%	53%
Gift set	4%	19%
Cold brew	1%	6%

Sleepy Owl, the largest D2C brand on Amazon, earns 86% of its Amazon sales from instant coffee. Blue Tokai is the exception: its Amazon sales are beans and ground coffee, at ₹263 per 100 g, against ₹298 on its own site.

6 · BLINKIT AND FLIPKART

Neither platform publishes sales figures, so these are counts of products. Blinkit: 379 coffee products and 87 brands across six dark stores in four cities. Flipkart: 377 products and 170 brands. Both use the same definition of coffee: instant, ground, beans and filter coffee; ready-to-drink, cold brew and machines are left out.

OWNER GROUP	BLINKIT, SHARE OF PRODUCTS	FLIPKART, SHARE OF PRODUCTS	BLINKIT, PER 100 G	FLIPKART, PER 100 G
Indian D2C	21.4%	13.0%	₹291	₹220
Indian corporate	28.0%	11.4%	₹208	₹107
Multinational	21.9%	7.4%	₹506	₹215
Owner unconfirmed	28.2%	68.2%	₹435	₹174

Blinkit. Indian D2C brands are 21.4% of the products. Nescafé and Bru are in all six stores. So are 5 of the 12 D2C brands: Sleepy Owl, Blue Tokai, Bevzilla, Coffeeza, Home Blend. Koramangala carries 260 products and Connaught Place 159; 69 products are in one store only. The price order is the one on Amazon: multinational first, then D2C, then Indian corporate.

Flipkart is a long tail of small sellers: 68% of products come from brands whose owner we could not confirm, and they hold 34 of the 55 top-ten places on the first page. Bevzilla lists 19 products, more than any other brand; Nescafé lists 9.

7 · WHAT SHARE OF EACH COMPANY’S SALES THIS IS

Each company’s sales on the Amazon coffee shelf, beside what it reports.

COMPANY	REPORTED REVENUE	ON THIS SHELF	SHARE OF REVENUE
Sleepy Owl (FY25)	₹44 crore	₹8.6 crore	19.5%
Blue Tokai (FY25, cafés included)	₹325 crore	₹2.2 crore	0.7%
Nestlé India, beverages (12 months to Dec 2024)	₹2,000+ crore	₹59.7 crore	3.0%

Sleepy Owl sells only packaged coffee, and this shelf is about 19% of its filed revenue. Blue Tokai’s revenue includes its cafés, so the shelf is about 0.7% of it. For Nescafé the shelf is about 3% of Nestlé India’s beverages business.

Sleepy Owl and Blue Tokai: filed revenue. Nestlé India: company statement for its beverages retail business. HUL and CCL do not report coffee on its own.

8 · WHAT WE PREDICTED

We wrote down 8 predictions before we read the shelf. 5 of 8 held.

WE SAID	WE FOUND	
The shelf sells ₹60 to ₹150 crore a year	₹152.6 crore	Wrong
Nescafé is the largest brand, above 25%, and Nestlé with HUL hold over 40%	Nescafé 39.1%; together 50.8%	Right
Indian D2C brands take 20 to 35%	11.4% (up to 14.6%)	Wrong
Instant takes over half the money, whole beans under 10%	Instant 82.6%, beans 7.8%	Right
The top three brands hold over 50%	62.0%	Right

D2C coffee costs at least three times Nescafé and Bru per 100 g	₹260 against ₹368	Wrong
On Blinkit, Nescafé and Bru are in all six stores, and under half the D2C brands are	Both are; 5 of 12 D2C brands	Right
D2C brands sell beans on their own sites and convenience on Amazon	Own sites 53% beans or ground; Amazon 70% instant or cold brew	Right

The two we got most wrong are the same mistake. We expected the researched buyer to carry the D2C roasters on Amazon, at a premium. On Amazon the D2C brands win by selling instant coffee, and they sell it for less than Nescafé.

9 · METHOD

Amazon India, six searches, three pages each: instant coffee, filter coffee powder, ground coffee, coffee beans, cold brew coffee and coffee powder. We counted only Amazon's own search results, not the carousels of related products, and opened the product page of every listing that shows a sales figure.

The shelf is everything Amazon files under Grocery, then Coffee, plus coffee gift boxes. Coffee makers and a green-coffee supplement that the searches also returned (₹0.8 crore a year) are not on it.

AMAZON CATEGORY	LISTINGS THAT SELL	SALES A YEAR, AT LEAST	
Instant Coffee	177	₹125.4 crore	On the shelf
Ground Coffee	73	₹13.2 crore	On the shelf
Whole beans, roasted	48	₹11.3 crore	On the shelf
Coffee (no sub-category)	5	₹0.8 crore	On the shelf
Coffee Gifts	1	₹0.6 crore	On the shelf
Ready to Drink Liquid Coffee	5	₹0.5 crore	On the shelf
Whole Coffee Beans	1	₹0.5 crore	On the shelf
Cold-Brew Coffee & Concentrate	4	₹0.2 crore	On the shelf
Cold Brew Coffee Makers	2	₹0.6 crore	Left out
No category shown	1	₹0.1 crore	Left out
Green Coffee	1	₹0.0 crore	Left out

Sales are Amazon's "bought in past month" figure at its lowest value, times the price on the product page, times twelve. A company that sells under several store names counts as one brand. Every brand's owner is researched by hand. Blinkit: five searches in six dark stores (Indiranagar and Koramangala in Bengaluru, Powai and Bandra West in Mumbai, Connaught Place in Delhi, Banjara Hills in Hyderabad), each page scrolled to the end. Flipkart: the same six searches as Amazon, three pages each. Own sites: the full public catalogue of 13 D2C roasters.

We read shelves like this one by category, by platform and by city, and read them again to show what moved. If you are building in coffee, tea or packaged food, **book a discovery call at www.impuls8.com/enterprise.**

impuls8 · read 2026-10-13 · Amazon India 707 listings, 319 with sales · Blinkit 379 products · Flipkart 377 products · every figure is generated from the read and checked by a second script.