Coffee and Ready-to-Drink Coffee in the U.S.: Retail and Foodservice, 8th Edition

Description:

Make no mistake, coffee is big business: Packaged Facts forecasts that retail and foodservice sales of coffee will top $48 billion in 2014. Of this amount, we expect $11.2 billion (or 23%) to come from retail sales and $37 billion (or 77%) to come from sales at foodservice establishments.

For coffeehouse and quick-service restaurant operators, attaching food to the purchase of coffee is more important than ever. Brands are aggressively innovating on both the beverage and food side of the menu to provide customers the ammunition needed for more pairing firepower. But more and more of these players are also branching into other beverages, which has the potential to dampen coffee sales growth. Any yet despite all the variety, hot coffee is still the go-to beverage, with 75% of coffee/coffee drink users saying that among 10 choices “hot coffee” is the coffee/coffee drink they drink most often. As restaurant operators race to launch loyalty programs, coffeehouse chains are fertile ground for programs that blend and harness social media, mobile technology and rewards. Our research suggests that coffeehouse users are receptive to social media and brand interplay, and when it comes to adapting to technology, these consumers are also ahead of curve.

On the retail side, the rise of single-serve is changing the retail coffee landscape—and if Green Mountain Coffee Roasters has its way—single serve will also change away-from-home coffee consumption. But coffee co-branding is also moving beyond coffee shop brands to align with other indulgent brands. Building off coffeehouse expectations for a wide variety of options, retail coffee manufacturers are also embracing variety, and sourcing has become a key element in coffee premiumization. And innovation abounds: To combat attrition, instant coffee marketers are trying to breathe life into the category focusing on quality products underscored by variety, functional, and value positioning. And this only scratches the surface.

This report provides industry participants with valuable insight on trends shaping this the highly competitive U.S. coffee market. Sales content includes 1) a market size and forecast for coffee sales at retail and foodservice, along with retail sales analysis by coffee segment and by distribution channel; and 2) detailed company analysis of the retail coffee market, by market segment (ground/whole bean, instant, instant flavored, espresso/cappuccino, and ready-to-drink coffee) and by brand; and 3) detailed company analysis of leading foodservice participants, including Dunkin' Donuts, Green Mountain Coffee Roasters, McDonald’s, Starbucks, Caribou Coffee and Tim Hortons, with a focus on how coffee fits into each companies’ competitive and growth strategies.

The report also:

- Identifies key marketing opportunities for coffee, supported by consumer survey data, product examples and other metrics. In particular, we focus on food and beverage pairing, organic growth opportunities, growing sales of iconic retail brands, and harnessing loyalty programs.
- Using proprietary survey results, assesses the degree which consumers get different coffee types for home use from different retail distribution channels; similarly, we assess the degree they get coffee for “immediate consumption” from a variety of foodservice channels. Comparative analysis is included.
- Explores coffee retail product trends centered on bringing the coffee shop experience into the consumers’ home (with an emphasis on co-branding); sourcing; convenience; and instant coffee, liquid concentrate and single-serve pod innovation.
- Assesses coffee menu trends, focusing on menu item penetration by restaurant segment, including beverage varieties, coffee flavors/types and coffee brands.
- Assesses household and personal coffee usage and usage frequency trends, including ground, whole bean, single-serve/pod, instant and RTD coffee; and household and personal coffee brand usage and trends, ground, whole bean, single-serve/pod, instant and RTD coffee. To help gauge brand loyalty, we also trend brands’ “usage preference ratios,” the ratio that consumers drink that brand "most" over drinking that brand “also.”
- Using proprietary survey results, provides comparative analysis on the degree to which consumers drink different flavors and types of coffee at home and at restaurants, as well as identifying which coffee types/flavors consumers drink most often.
- Drawing from consumer survey "ranking" responses, identifies the relative importance consumers place on factors such as taste, getting a specific brand, low price, and time of day when deciding to order coffee at a restaurant.
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