Refrigerated Coffee Creamers: U.S. Market Trends

Description:

The refrigerated coffee creamers market is once again rising to the top after years of stagnant growth. Among the prominent factors bolstering sales are newer-generation products that meet the “clean label” criteria for ingredients: fewer, simpler, and pronounceable. Some of these products also offer other features and claims associated with clean labels, such as organic, allergen-free, non-GMO, and vegan. Recent year-to-year sales increases for existing products are testament to the vitality of this burgeoning niche, and marketers’ confidence in its continued growth is evidenced by their investment in new products.

Packaged Facts’ report Refrigerated Coffee Creamers: U.S. Market Trends focuses on the dynamic market for refrigerated coffee creamers, particularly with respect to the impact of current product, marketing, and consumer trends. Also discussed in the context of this market are sales and usage trends in the shelf-stable coffee creamer segment. For further perspective, Packaged Facts examines dairy beverage trends. The report offers growth projections for refrigerated coffee creamers and features the results of an exclusive national online consumer survey of coffee drinkers’ tendencies, preferences, and purchase influences when it comes to creamer products. Included are more than one dozen detailed demographic profiles of coffee and creamer consumers.

Scope and Methodology

This report covers current trends in the U.S. market for coffee creamer products sold through all types of retail outlets, including supermarkets, discount stores and supercenters, warehouse clubs, and mass merchandisers, as well as convenience stores, drugstores, health and natural food stores, grocery stores, and farms and farmers markets.

Products Covered

The commercial/packaged coffee creamers market is composed of two segments: refrigerated liquid creamers and shelf-stable creamers. The focus of this report is the larger and more dynamic refrigerated segment. Shelf-stable coffee creamers are analyzed primarily in the context of overall market and competitive trends. Also addressed are trends in consumer usage of ready-to-drink refrigerated dairy and dairy alternative beverages in coffee.

Data Sources

The three main sources of data for this report are IRI sales-tracking data, Packaged Facts online consumer survey data, and Simmons Market Research national consumer survey data.

Contents:

Chapter 1 Executive Summary
Report Scope
Products Covered
Research Methodology
Data Sources
IRI
Packaged Facts Online Consumer Survey
Simmons Market Research
Other Data Sources
Market Trends and Opportunities
Table 1-1 U.S. Retail Sales of Refrigerated Coffee Creamer Products, 2011-2015 (millions of dollars, percent change)
Market Growth
Table 1-2 Projected U.S. Retail Sales of Refrigerated Coffee Creamer Products, 2015-2020 (millions of dollars, percent change)
The Marketers
Figure 1-1 Refrigerated Coffee Creamer Marketer Shares, 2015 (percent of dollar sales)

Marketing and New Product Trends
The Consumer
Table 1-3 Usage of Non-Dairy Cream Substitutes, 2015 (percent of U.S. households)

Chapter 2 Market Trends and Opportunities
Key Points
Report Scope
Products Covered
Product Definitions
Alternate Definitions
Research Methodology
Primary Sources
IRI
Packaged Facts Online Consumer Survey
Simmons Market Research
Favorable Demographic Indicators

Other Data Sources
Market Size
Overall Market for Refrigerated Coffee Creamer Products Approaches $2.5 Billion
Table 2-1 U.S. Retail Sales of Refrigerated Coffee Creamer Products, 2011-2015 (millions of dollars, percent change)
Table 2-2 IRI-Tracked Sales of Refrigerated Coffee Creamers, 2014-2015
Refrigerated vs. Shelf-Stable Coffee Creamers
Table 2-3 IRI-Tracked Sales of Shelf-Stable Coffee Creamers, 2014-2015
Refrigerated Half & Half and Dairy Cream
Table 2-4 IRI-Tracked Sales of Refrigerated Dairy Half & Half, 2014-2015
Table 2-5 IRI-Tracked Sales of Refrigerated Dairy Cream, 2014-2015

Overall Consumption Trends
Household Usage of Non-Dairy Cream Substitutes Steady, Heavy Usage at Five-Year High
Table 2-6 Non-Dairy Cream Substitutes Usage Trends, 2011-2015 (percent of U.S. households)
Table 2-7 Containers of Non-Dairy Cream Substitutes Used in Last 30 Days, 2011-2015 (percent of U.S. households)
One-Quarter of Households Use Half & Half
Table 2-8 Household Usage of Half & Half, 2011-2015 (percent of U.S. households)
Meanwhile, A Dip in Coffee Consumption
Table 2-9 Packaged and Ready-to-Drink Coffee Usage Trends, 2011-2015 (percent of U.S. households)

Market Trends
Clean Labels Gain Traction
Figure 2-1 Agreement with Statement: "When it comes to packaged foods and beverage products, the fewer ingredients the better," 2016 (percent of adults)
Many Consumers Use Milk Beverages Rather Than Creamers in Coffee
Figure 2-2 Use of Any Type of Milks/Creamers: Hot vs. Chilled/Iced Coffee, 2016 (percent of coffee drinkers)
Price Is Top Factor in Choosing a Creamer, Followed by Flavor
Figure 2-3 Factors in Choosing Among Cream/Creamer Options, 2016 (percent of coffee drinkers)
Many Coffee Drinkers Don't Like How Creamers Taste
Table 2-10 Reasons for Not Buying Commercial/Packaged Coffee Creamers, 2016 (percent of coffee drinkers)

Millennials, African Americans, and Hispanics Show Highest Usage Rates
Market Growth
Market Projected to Reach $2.9 Billion by 2020
Table 2-11 Projected U.S. Retail Sales of Refrigerated Coffee Creamer Products, 2015-2020 (millions of dollars, percent change)

Product Innovation Will Drive the Market
The Clean Label Movement
Plant-Based Creamers
Other Potential Growth Opportunities

Chapter 3 The Marketers
Key Points
Marketer Shares
Three Companies Control 90% of Refrigerated Creamer Market
Figure 3-1 Refrigerated Coffee Creamer Marketer Shares, 2015 (percent of dollar sales)
Table 3-1 Refrigerated Coffee Creamer Marketer Shares, 2014-2015 (percent of dollar sales)
Household Brand Usage Reflects Sales Trends
Table 3-2 Brands of Non-Dairy Cream Substitutes Used, by Frequency, 2011-2015 (percent of U.S. households)
Table 3-3 Brands of Non-Dairy Cream Substitutes Used, By Frequency, 2015 (percent of U.S. households using non-dairy cream substitutes)
Marketer and Brand Snapshots
Nestlé's Coffee-mate Dominates the Market
Table 3-4 IRI-Tracked Sales of Refrigerated Coffee Creamers: Nestlé USA, 2015 (thousand $)
WhiteWave's Creamers Range From Plain to Premium to Plant
Table 3-5 IRI-Tracked Sales of Refrigerated Coffee Creamers: WhiteWave Foods Company, 2015 (thousand $)
Baileys' Style
Table 3-6 IRI-Tracked Sales of Refrigerated Coffee Creamers: H.P. Hood, 2015 (thousand $)
Chapter 4 Marketing and New Product Trends
Key Points
Five-Year Trends in Non-Dairy Cream Substitute Preferences
Liquid Creamers Distinctly Favored Over Powdered
Table 4-1 Forms of Non-Dairy Cream Substitutes Used, 2011-2015 (percent of U.S. households)
Use of “Regular” Creamer Far Exceeds That of Low Fat, Sugar-Free Varieties
Table 4-2 Types of Non-Dairy Cream Substitutes Used, 2011-2015 (percent of U.S. households)
French Vanilla Remains Flavor of Choice
Table 4-3 Flavors of Non-Dairy Cream Substitutes Used, 2011-2015 (percent of U.S. households)
Product Innovation Redirects from Flavors to Formulations
Table 4-4 IRI-Tracked Sales of Selected “Clean Label” Refrigerated Coffee Creamers, 2015 (thousand $)
Coffee-mate and Baileys Remain Champions of Seasonal and Limited-Edition Creamers
Table 4-5 Selected New Coffee Creamer Products
Illustration 4-1 Califia Better Half
Illustration 4-2 Califia Farms Almondmilk Creamer: Unsweetened
Illustration 4-3 Coffee-mate Natural Bliss: Salted Caramel
Illustration 4-4 Coffee-mate limited-edition Star Wars-themed creamer bottles
Illustration 4-5 Coffee-mate Chocolate Boutique
Illustration 4-6 Coffee-mate 2GO
Illustration 4-7 Coffee-mate Extra Sweet & Creamy
Illustration 4-8 Baileys Limited Edition Hazelnut Caramel Blondie
Illustration 4-9 Baileys 2015 Holiday Flavors
Illustration 4-10 International Delight Simply Pure
Illustration 4-11 Organic Valley Flavored Half & Half
Illustration 4-12 Silk Almond Creamer: Caramel; Hazelnut
Illustration 4-13 So Delicious Almondmilk Creamer
Illustration 4-14 So Delicious Coconutmilk Creamer Quarts
Illustration 4-15 Coffee-mate Italian Sweet Crème: Sugar Free
Illustration 4-16 Coffee-mate 2015 Holiday Flavors
Illustration 4-17 Coffee-mate liquid creamer
Illustration 4-18 Dunkin' Donuts Creamer Singles
Illustration 4-19 Coconut Cloud Powdered Coconut Milk Creamer
Marketing to Millennials
Gingerbread Man Retained for Coffee-mate's Largest-Ever Seasonal Campaign
Illustration 4-20 Coffee-mate TV spot: “Gingerbread Joel Makes an Awkward First Impression”
Illustration 4-21 Gingerbread Joel Tumbler Post: “I Woke Up Like This”
Natural Bliss Baristas Go Au Natural for a Day
Illustration 4-22 The Natural Bliss Café - Surprisingly Natural
Coffee-mate's Coffee Mug Café Energizes, Engages Ohio State Students
Chapter 5 The Consumer
Key Points
Methodology
Demographic Indicators
Non-Dairy Cream Substitutes: Household Usage Rates
Over Four in 10 Households Use Non-Dairy Cream Substitutes
Table 5-1 Usage of Non-Dairy Cream Substitutes, 2015 (percent of U.S. households)
Figure 5-1 Containers of Non-Dairy Cream Substitutes Used in Last 30 Days, 2015 (percent of U.S. households)
Users Show Strong Preferences in Form, Type, and Flavor Segments
Figure 5-2 Forms of Non-Dairy Cream Substitutes Used Most Often, 2015 (percent of U.S. households)
Figure 5-3 Types of Non-Dairy Cream Substitutes Used Most Often, 2015 (percent of U.S. households)
Table 5-2 Flavors of Non-Dairy Cream Substitutes Used, 2015 (percent of U.S. households)
Non-Dairy Cream Substitute Purchasers: Demographics
Age and Race Primary Predictors of Non-Dairy Cream Substitutes Use
Table 5-3 Demographic Indicators Favoring Use of Non-Dairy Cream Substitutes, 2015 (index)
Table 5-4 Demographic Indicators Favoring Use of Non-Dairy Cream Substitutes: By Number of Containers Used in Last 30 Days, 2015 (index)
Table 5-5 Demographic Classifications Indexing 120 or Above for Use of Non-Dairy Cream Substitutes in Selected Segments, 2015 (index)
Table 5-6 Demographic Indicators Favoring Use of Non-Dairy Cream Substitutes: By Form Used Most Often, 2015 (index)
Table 5-7 Demographic Indicators Favoring Use of Non-Dairy Cream Substitutes: By Types Used Most Often, 2015 (index)
Table 5-8 Demographic Indicators Favoring Use of Non-Dairy Cream Substitutes: By Flavors Used Most Often, 2015 (index)
Table 5-9 Demographic Indicators Favoring Use of Non-Dairy Cream Substitutes: By Brands Used Most Often, 2015 (index)
Users of Half & Half Tend to Be Older, Northeasterners
Table 5-10 Demographic Indicators Favoring Use of Half & Half, 2015 (index)
Different Types of Coffee, Different Types of Coffee Drinkers
Table 5-11 Demographic Indicators Favoring Use of Packaged and Ready-to-Drink Coffee, 2015 (index)
Non-Dairy Cream Substitute Households: Psychographics
Users of Non-Dairy Cream Substitutes Are Weight-Conscious Foodies
Table 5-12 Food and Health Attitudes of Consumers of Non-Dairy Cream Substitutes vs. Half & Half, 2015 (index)
Coffee and Creamers: Consumer Patterns
Seven in 10 Drink Hot Coffee, 30% Chilled
Table 5-13 Coffee and Tea Consumption by Beverage Type, 2016 (percent of adults)
Hot vs. Cold Weather
Table 5-14 Consumption of Hot and Chilled/Iced Coffee: Warm vs. Cold Weather, 2016 (percent of coffee drinkers)
Eight in 10 Coffee Drinkers Use Packaged Coffee Creamers
Table 5-15 Use of Any Milk or Creamer Product by Type, 2016 (percent of coffee drinkers)
Table 5-16 Use of Commercial/Packaged Creamers: Hot vs. Chilled/Iced Coffee, 2016 (percent of coffee drinkers)
Table 5-17 Use of Dairy Beverages in Coffee: Hot vs. Chilled/Iced Coffee, 2016 (percent of coffee drinkers)
Table 5-18 Use of Plant Milks in Coffee: Hot vs. Chilled/Iced Coffee, 2016 (percent of coffee drinkers)
Table 5-19 Types of Commercial/Packaged Coffee Creamer Products Used: Hot vs. Chilled/Iced Coffee, 2016 (percent of coffee drinkers)
Price Most Influential in Creamer Selection
Table 5-20 Factors in Choosing Among Cream/Creamer Options, 2016 (percent of coffee drinkers)
Non-Users Concerned About Unhealthy Ingredients
Figure 5-4 Reasons for Not Buying Commercial/Packaged Coffee Creamers, 2016 (percent of coffee drinkers)
Millennials Stand Out as Coffee Drinkers, Creamer Users, Discerning Shoppers
Table 5-21 Consumption of Hot or Chilled/Iced Coffee: Demographic Indicators, 2016 (percent of adults)
Table 5-22 Use of Creams/Creamers in Hot or Chilled/Iced Coffee by Type: Demographic Indicators, 2016 (percent of coffee drinkers)

Ordering:
Order Online - http://www.researchandmarkets.com/reports/3758059/

Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Product Name: Refrigerated Coffee Creamers: U.S. Market Trends
Web Address: http://www.researchandmarkets.com/reports/3758059/
Office Code: SCWP7WXA

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Format</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) -</td>
<td></td>
<td>USD 2000</td>
</tr>
<tr>
<td>Single User:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electronic (PDF) -</td>
<td></td>
<td>USD 4000</td>
</tr>
<tr>
<td>Enterprisewide:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* The price quoted above is only valid for 30 days. Please submit your order within that time frame to avail of this price as all prices are subject to change.

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title:                     Mr  Mrs  Dr  Miss  Ms  Prof
First Name:                ___________________________ Last Name: ___________________________
Email Address: *            ___________________________
Job Title:                 ___________________________
Organisation:              ___________________________
Address:                   ___________________________
City:                      ___________________________
Postal / Zip Code:         ___________________________
Country:                   ___________________________
Phone Number:              ___________________________
Fax Number:                ___________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ______________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World