



Euromonitor
International

Hot Drinks in the United Kingdom

November 2024

Table of Contents

EXECUTIVE SUMMARY

- Hot drinks in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retailing developments
- Foodservice vs retail split
- What next for hot drinks?

MARKET DATA

- Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2019-2024
- Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2019-2024
- Table 3 - Retail Sales of Hot Drinks by Category: Volume 2019-2024
- Table 4 - Retail Sales of Hot Drinks by Category: Value 2019-2024
- Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2019-2024
- Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2019-2024
- Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2019-2024
- Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2019-2024
- Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2019-2024
- Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2019-2024
- Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2020-2024
- Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2021-2024
- Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2019-2024
- Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2019-2024
- Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2024
- Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2024-2029
- Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2024-2029
- Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2024-2029
- Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2024-2029
- Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2024-2029
- Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2024-2029
- Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2024-2029
- Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2024-2029
- Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2024-2029
- Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Premiumisation at home fuels growth of fresh coffee
- Winners of instant coffee: Specialty mixes and private label
- Costa Coffee is strongest performer, with a focus on value offerings, innovation and promotions

PROSPECTS AND OPPORTUNITIES

- The future of coffee in the UK: Balancing cost pressures and the demand for value
- The demand for decaffeinated options and the rise of health-conscious choices

Sustainability and recyclable packaging will remain key focus areas

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2019-2024

Table 27 - Retail Sales of Coffee by Category: Value 2019-2024

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2019-2024

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2019-2024

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2019-2024

Table 31 - NBO Company Shares of Coffee: % Retail Value 2020-2024

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2021-2024

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2024-2029

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2024-2029

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2024-2029

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2024-2029

Tea in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

From tradition to innovation: The rise of fruit/herbal tea in the UK

Sustainability and ethical sourcing in focus

Yorkshire Tea is leading brand with innovative products and a focus on marketing

PROSPECTS AND OPPORTUNITIES

The refreshing appeal of cold tea in the UK

Driving volume growth through promotions amid economic uncertainty

Wellness in a cup: The future growth of mood-boosting and functional teas

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2019-2024

Table 38 - Retail Sales of Tea by Category: Value 2019-2024

Table 39 - Retail Sales of Tea by Category: % Volume Growth 2019-2024

Table 40 - Retail Sales of Tea by Category: % Value Growth 2019-2024

Table 41 - NBO Company Shares of Tea: % Retail Value 2020-2024

Table 42 - LBN Brand Shares of Tea: % Retail Value 2021-2024

Table 43 - Forecast Retail Sales of Tea by Category: Volume 2024-2029

Table 44 - Forecast Retail Sales of Tea by Category: Value 2024-2029

Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2024-2029

Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2024-2029

Other Hot Drinks in the United Kingdom

KEY DATA FINDINGS

2024 DEVELOPMENTS

Health trend remains a challenge for chocolate-based flavoured powder drinks

The alarming rise of cocoa and sugar prices

Horlicks fuels value growth in malt-based hot drinks

PROSPECTS AND OPPORTUNITIES

Growth opportunities remain within the mature hot chocolate space

Guilt-free indulgence: Growing demand for plant-based and vegan hot drinks

Foodservice demand set to continue growing over the forecast period

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2019-2024

Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2019-2024

Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2019-2024

Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2019-2024

Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2020-2024

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2021-2024

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2024-2029

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2024-2029

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2024-2029

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2024-2029

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-the-united-kingdom/report.