



# Passport

## Coffee in the United Kingdom

Euromonitor International

November 2022

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# COFFEE IN THE UNITED KINGDOM - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2022 DEVELOPMENTS

Fresh coffee beans sees the fastest retail volume growth, while instant standard coffee declines

Despite the return to offices and campuses, at-home consumption of coffee has remained

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Flavour innovation is the overarching company strategy

Although unprecedented price rises have primarily been caused by cost-push inflation, demand-pull inflation continues to be pertinent in coffee in the UK. This can largely be attributed

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### E-commerce cools off, whilst vending and discounters heat up

Investments in vending from Costa Express, Lavazza and Pret A Manger are paying off, as consumers enjoy the convenience and automation of their machines. With increased commuter

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## PROSPECTS AND OPPORTUNITIES

### Cost-of-living crisis set to dampen growth in fresh ground coffee pods and limit decline in instant coffee

In 2022, fresh ground coffee pods is expected to see its first ever decline in retail volume terms. Indeed, although a return to growth is expected from 2023, in the early years of the

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### Climate change set to continue to hamper growth

Although many of the major players, such as Starbucks, hedged their coffee prices for the

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### App-based orders the future for foodservice channels

The digitalisation of coffee foodservice channels in Britain was catalysed by the pandemic, with coffee shop trading restricted for nearly two years. Starbucks and Caffè Nero invested in



### CATEGORY DATA

**Table 1** Retail Sales of Coffee by Category: Volume 2017-2022

Tonnes	2017	2018	2019	2020	2021	2022
- Instant Coffee Mixes	Data removed from sample					
- Instant Standard Coffee						
Instant Coffee						
-- Standard Fresh						
Ground Coffee						
-- Fresh Ground Coffee						
Pods						
- Fresh Ground Coffee						
- Fresh Coffee Beans						
Fresh Coffee						
Coffee						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 2** Retail Sales of Coffee by Category: Value 2017-2022

GBP million	2017	2018	2019	2020	2021	2022
- Instant Coffee Mixes	Data removed from sample					
- Instant Standard Coffee						
Instant Coffee						
-- Standard Fresh						
Ground Coffee						
-- Fresh Ground Coffee						
Pods						
- Fresh Ground Coffee						
- Fresh Coffee Beans						
Fresh Coffee						

Coffee

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 Retail Sales of Coffee by Category: % Volume Growth 2017-2022**

% volume growth	2021/22	2017-22 CAGR	2017/22 Total
- Instant Coffee Mixes	<b>Data removed from sample</b>		
- Instant Standard Coffee			
Instant Coffee			
-- Standard Fresh Ground Coffee			
-- Fresh Ground Coffee Pods			
- Fresh Ground Coffee			
- Fresh Coffee Beans			
Fresh Coffee			
Coffee			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Retail Sales of Coffee by Category: % Value Growth 2017-2022**

% current value growth	2021/22	2017-22 CAGR	2017/22 Total
- Instant Coffee Mixes	<b>Data removed from sample</b>		
- Instant Standard Coffee			
Instant Coffee			
-- Standard Fresh Ground Coffee			
-- Fresh Ground Coffee Pods			
- Fresh Ground Coffee			
- Fresh Coffee Beans			
Fresh Coffee			
Coffee			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2017-2022**

% retail volume	2017	2018	2019	2020	2021	2022
Hard Coffee Pods	<b>Data removed from sample</b>					
Soft Coffee Pods						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Totals may not sum to 100% due to data rounding

**Table 6 NBO Company Shares of Coffee: % Retail Value 2018-2022**

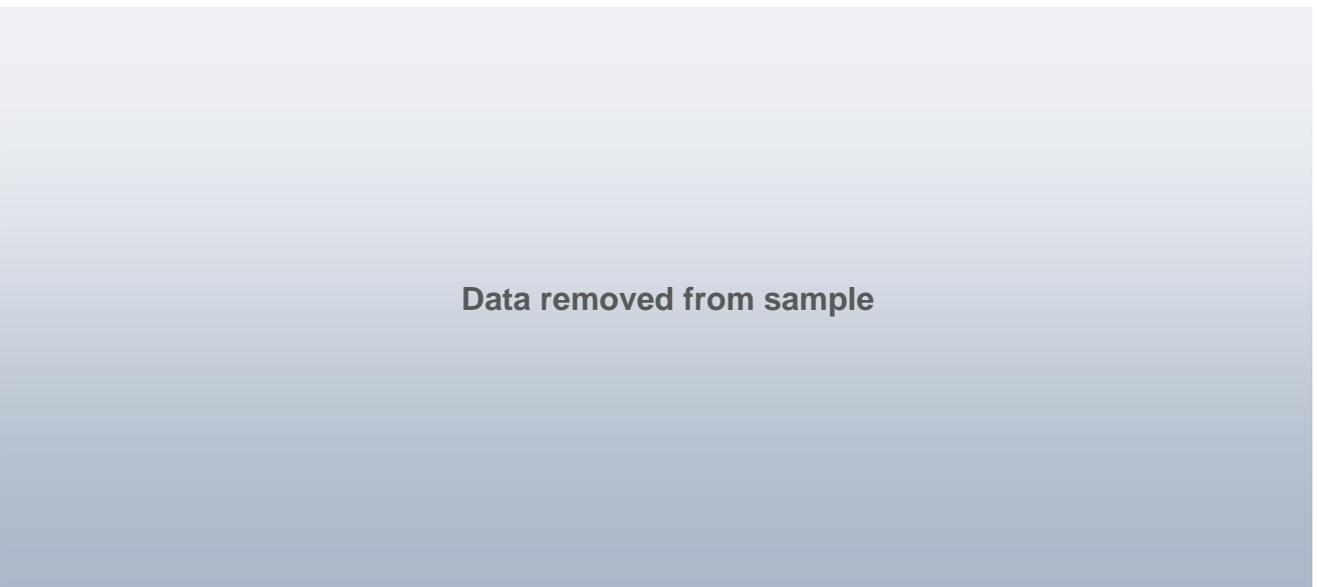
% retail value rsp Company	2018	2019	2020	2021	2022
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 LBN Brand Shares of Coffee: % Retail Value 2019-2022

% retail value rsp Brand (GBO)	Company (NBO)	2019	2020	2021	2022
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 8 Forecast Retail Sales of Coffee by Category: Volume 2022-2027**

Tonnes	2022	2023	2024	2025	2026	2027
- Instant Coffee Mixes	<b>Data removed from sample</b>					
- Instant Standard Coffee						
Instant Coffee						
-- Standard Fresh						
Ground Coffee						
-- Fresh Ground Coffee						
Pods						
- Fresh Ground Coffee						
- Fresh Coffee Beans						
Fresh Coffee						
Coffee						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 9 Forecast Retail Sales of Coffee by Category: Value 2022-2027**

GBP million	2022	2023	2024	2025	2026	2027
- Instant Coffee Mixes	<b>Data removed from sample</b>					
- Instant Standard Coffee						
Instant Coffee						
-- Standard Fresh						
Ground Coffee						
-- Fresh Ground Coffee						
Pods						
- Fresh Ground Coffee						
- Fresh Coffee Beans						
Fresh Coffee						
Coffee						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 10 Forecast Retail Sales of Coffee by Category: % Volume Growth 2022-2027**

% volume growth	2022/23	2022-27 CAGR	2022/27 Total
- Instant Coffee Mixes	<b>Data removed from sample</b>		
- Instant Standard Coffee			
Instant Coffee			
-- Standard Fresh Ground Coffee			
-- Fresh Ground Coffee Pods			
- Fresh Ground Coffee			
- Fresh Coffee Beans			
Fresh Coffee			
Coffee			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 11 Forecast Retail Sales of Coffee by Category: % Value Growth 2022-2027**

% constant value growth

	2022/2023	2022-27 CAGR	2022/27 Total
- Instant Coffee Mixes	<b>Data removed from sample</b>		
- Instant Standard Coffee			
Instant Coffee			
-- Standard Fresh Ground Coffee			
-- Fresh Ground Coffee Pods			
- Fresh Ground Coffee			
- Fresh Coffee Beans			
Fresh Coffee			
Coffee			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# HOT DRINKS IN THE UNITED KINGDOM - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Hot drinks in 2022: The big picture

As British consumers have continued to turn away from tea and towards coffee, the latter is set to experience stronger retail current value growth in 2022, and will drive growth in overall hot

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### 2022 key trends

The overarching premiumisation trend in all hot drinks categories in the UK is comprised of numerous sub-trends. The most intriguing of these is the exploration trend, which has seen

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### Competitive landscape

Nestlé UK is expected to maintain its lead in hot drinks in retail value terms in 2022. This can largely be attributed to the player's success in coffee. This is despite its exposure to the

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## Retailing developments

Vending is set to be the major winner in terms of distribution channels for hot drinks in 2022, benefiting from investment by major players such as Costa and Lavazza during the pandemic.

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## Foodservice vs retail split

Similar to 2021, 2022 has seen volume recovery in foodservice and the decline of retail in hot

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## What next for hot drinks?

In hot drinks, foodservice volume growth is anticipated to outpace retail. Although in the early half of the forecast period this growth will reflect recovery from the decline seen in 2020, in the

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## MARKET DATA

**Table 12 Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2017-2022**

% volume analysis

	2017	2018	2019	2020	2021	2022
Retail	<b>Data removed from sample</b>					
Foodservice						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 13 Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2017-2022**

% volume growth

	2021/22	2017-22 CAGR	2017/22 Total
Retail	<b>Data removed from sample</b>		
Foodservice			
Total			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 14 Retail Sales of Hot Drinks by Category: Volume 2017-2022**

Tonnes

	2017	2018	2019	2020	2021	2022
Other Hot Drinks	<b>Data removed from sample</b>					
Tea						
Coffee						
Hot Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 15 Retail Sales of Hot Drinks by Category: Value 2017-2022**

GBP million

	2017	2018	2019	2020	2021	2022
Other Hot Drinks	<b>Data removed from sample</b>					
Tea						
Coffee						
Hot Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 16 Retail Sales of Hot Drinks by Category: % Volume Growth 2017-2022**

% volume growth

	2021/22	2017-22 CAGR	2017/22 Total

Other Hot Drinks  
Tea  
Coffee  
Hot Drinks

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 17 Retail Sales of Hot Drinks by Category: % Value Growth 2017-2022**

% current value growth

2021/22      2017-22 CAGR      2017/22 Total

Other Hot Drinks  
Tea  
Coffee  
Hot Drinks

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 18 Foodservice Sales of Hot Drinks by Category: Volume 2017-2022**

Tonnes

2017      2018      2019      2020      2021      2022

Other Hot Drinks  
Tea  
Coffee  
Hot Drinks

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 19 Foodservice Sales of Hot Drinks by Category: % Volume Growth 2017-2022**

% volume growth

2021/22      2017-22 CAGR      2017/22 Total

Other Hot Drinks  
Tea  
Coffee  
Hot Drinks

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 20 Total Sales of Hot Drinks by Category: Total Volume 2017-2022**

Tonnes

2017      2018      2019      2020      2021      2022

Other Hot Drinks  
Tea  
Coffee  
Hot Drinks

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 21 Total Sales of Hot Drinks by Category: % Total Volume Growth 2017-2022**

% total volume growth	2021/22	2017-22 CAGR	2017/22 Total
Other Hot Drinks	<b>Data removed from sample</b>		
Tea			
Coffee			
Hot Drinks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 22 NBO Company Shares of Hot Drinks: % Retail Value 2018-2022**

% retail value rsp Company	2018	2019	2020	2021	2022
<b>Data removed from sample</b>					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 23 LBN Brand Shares of Hot Drinks: % Retail Value 2019-2022

% retail value rsp Brand (GBO)	Company (NBO)	2019	2020	2021	2022
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**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 24 Penetration of Private Label in Hot Drinks by Category: % Retail Value 2017-2022**

% retail value rsp	2017	2018	2019	2020	2021	2022
Other Hot Drinks	<b>Data removed from sample</b>					
Tea						
Coffee						
Hot Drinks						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 25 Retail Distribution of Hot Drinks by Format: % Volume 2017-2022**

% retail volume	2017	2018	2019	2020	2021	2022
Retail Channels						
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores	3.9	3.9	3.9	4.4	4.3	4.2
---- Forecourt Retailers	0.2	0.2	0.2	0.2	0.2	0.2
--- Supermarkets	40.3	40.0	39.9	39.4	38.9	38.7
--- Hypermarkets	37.7	37.6	37.4	36.7	36.4	36.3
--- Discounters	6.4	6.6	6.7	6.9	7.2	7.5
--- Warehouse Clubs	0.1	0.1	0.1	0.1	0.1	0.1
--- Food/drink/tobacco specialists	0.5	0.6	0.6	0.6	0.6	0.6
--- Small Local Grocers	2.2	2.1	2.1	2.1	2.0	2.0
-- Non-Grocery Retailers	1.9	2.0	1.9	1.9	1.9	1.9
--- General Merchandise Stores	1.9	2.0	1.9	1.9	1.9	1.9
--- Apparel and Footwear Specialists	-	-	-	-	-	-
--- Appliances and Electronics Specialists	-	-	-	-	-	-
--- Home Products Specialists	-	-	-	-	-	-
--- Health and Beauty Specialists	-	-	-	-	-	-
--- Leisure and Personal Goods Specialists	-	-	-	-	-	-
--- Other Non-Grocery Retailers	-	-	-	-	-	-
-- Vending	0.4	0.4	0.4	0.3	0.4	0.6
-- Direct Selling	-	-	-	-	-	-
- Retail E-Commerce	6.4	6.6	6.8	7.4	8.2	8.0
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 26 Retail Distribution of Hot Drinks by Format and Category: % Volume 2022**

% retail volume

	Coffee	Tea	Other Hot Drinks
Retail Channels	100.0	100.0	100.0
- Retail Offline	89.5	94.2	94.9
-- Grocery Retailers	86.2	92.7	91.5
--- Convenience Retail	5.0	3.8	4.0
---- Convenience Stores	4.8	3.6	4.0
---- Forecourt Retailers	0.3	0.1	0.0
--- Supermarkets	36.6	40.1	42.8
--- Hypermarkets	34.3	37.7	39.9
--- Discounters	8.0	8.1	2.1
--- Warehouse Clubs	0.1	0.0	0.1
--- Food/drink/tobacco specialists	1.3	0.0	0.0
--- Small Local Grocers	1.0	3.0	2.6
-- Non-Grocery Retailers	2.3	1.4	2.1
--- General Merchandise Stores	2.3	1.4	2.1
--- Apparel and Footwear Specialists	0.0	0.0	0.0
--- Appliances and Electronics Specialists	0.0	0.0	0.0
--- Home Products Specialists	0.0	0.0	0.0
--- Health and Beauty Specialists	0.0	0.0	0.0
--- Leisure and Personal Goods Specialists	0.0	0.0	0.0
--- Other Non-Grocery Retailers	0.0	0.0	0.0
-- Vending	1.0	0.1	1.3
-- Direct Selling	0.0	0.0	0.0
- Retail E-Commerce	10.5	5.8	5.1
Total	100.0	100.0	100.0

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: C = coffee; T = tea; OHD = other hot drinks

**Table 27 Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2022-2027**

% volume analysis	2022	2023	2024	2025	2026	2027
Retail	75.3	74.2	73.3	72.6	72.0	71.5
Foodservice	24.7	25.8	26.7	27.4	28.0	28.5
Total	100.0	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 28 Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2022-2027**

% volume growth	2022/23	2022-27 CAGR	2022/27 Total
Retail	-0.8	-0.4	-1.8
Foodservice	5.7	3.6	19.4
Total	0.8	0.7	3.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 29 Forecast Retail Sales of Hot Drinks by Category: Volume 2022-2027**

Tonnes	2022	2023	2024	2025	2026	2027
Other Hot Drinks	14,839.2	14,613.4	14,357.0	14,092.9	13,819.8	13,524.2
Tea	77,182.0	76,257.6	75,525.6	75,041.7	74,705.5	74,566.5
Coffee	81,400.8	81,216.6	81,199.5	81,386.8	81,690.0	82,162.7
Hot Drinks	173,422.0	172,087.6	171,082.1	170,521.3	170,215.2	170,253.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 30 Forecast Retail Sales of Hot Drinks by Category: Value 2022-2027**

GBP million	2022	2023	2024	2025	2026	2027
Other Hot Drinks	205.9	203.3	199.5	195.2	190.4	185.1
Tea	944.2	949.0	959.2	975.0	995.9	1,022.6
Coffee	2,135.4	2,144.7	2,159.8	2,184.9	2,216.2	2,254.9
Hot Drinks	3,285.6	3,297.0	3,318.5	3,355.0	3,402.6	3,462.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 31 Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2022-2027**

% volume growth	2022/23	2022-27 CAGR	2022/27 Total
Other Hot Drinks	-1.5	-1.8	-8.9
Tea	-1.2	-0.7	-3.4
Coffee	-0.2	0.2	0.9
Hot Drinks	-0.8	-0.4	-1.8

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 32 Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2022-2027**

% constant value growth	2022/2023	2022-27 CAGR	2022/27 Total
Other Hot Drinks	-1.3	-2.1	-10.1
Tea	0.5	1.6	8.3
Coffee	0.4	1.1	5.6
Hot Drinks	0.3	1.1	5.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 33 Forecast Foodservice Sales of Hot Drinks by Category: Volume 2022-2027**

Tonnes	2022	2023	2024	2025	2026	2027
--------	------	------	------	------	------	------

Other Hot Drinks	137.7	143.6	146.7	148.4	150.0	151.4
Tea	11,911.6	12,545.3	13,136.2	13,577.5	13,987.6	14,376.4
Coffee	44,699.4	47,301.9	49,007.2	50,521.5	51,934.8	53,223.8
Hot Drinks	56,748.7	59,990.7	62,290.0	64,247.5	66,072.3	67,751.6

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 34** Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2022-2027

% volume growth	2022/23	2022-27 CAGR	2022/27 Total
Other Hot Drinks	4.3	1.9	9.9
Tea	5.3	3.8	20.7
Coffee	5.8	3.6	19.1
Hot Drinks	5.7	3.6	19.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 35** Forecast Total Sales of Hot Drinks by Category: Total Volume 2022-2027

Tonnes	2022	2023	2024	2025	2026	2027
Other Hot Drinks	14,976.9	14,756.9	14,503.7	14,241.3	13,969.7	13,675.5
Tea	89,093.6	88,802.9	88,661.8	88,619.2	88,693.1	88,942.9
Coffee	126,100.2	128,518.5	130,206.6	131,908.3	133,624.8	135,386.6
Hot Drinks	230,170.8	232,078.3	233,372.1	234,768.8	236,287.6	238,005.0

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 36** Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2022-2027

% total volume growth	2022/23	2022-27 CAGR	2022/27 Total
Other Hot Drinks	-1.5	-1.8	-8.7
Tea	-0.3	0.0	-0.2
Coffee	1.9	1.4	7.4
Hot Drinks	0.8	0.7	3.4

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

## DISCLAIMER

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## SOURCES

Sources used during the research included the following:

Summary 1    Research Sources

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