



Coffee in the United Kingdom

November 2025

Table of Contents

Coffee in the United Kingdom - Category analysis

KEY DATA FINDINGS

2025 PERFORMANCE

Coffee market focusing on added-value products as demand stalls

INDUSTRY PERFORMANCE

Focus shifts to value over volume growth in coffee

The search for healthy indulgence informing the growth and development of coffee

WHAT'S NEXT?

Coffee market set to focus on resilience, sustainability, and innovation

The future of coffee: automation, AI, and bean-less innovation

Functionality and flavour innovation will remain key for growth

COMPETITIVE LANDSCAPE

Nestlé continues to lead with ongoing investment in its portfolio

Innovation playing a key role in driving competition in coffee

CHANNELS

Supermarkets and hypermarkets remain dominant but e-commerce is thriving

On-trade sales remain buoyant despite rising prices

CATEGORY DATA

Table 1 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 2 - Retail Sales of Coffee by Category: Value 2020-2025

Table 3 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 5 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 6 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 7 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 8 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 9 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 10 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Hot Drinks in the United Kingdom - Industry Overview

EXECUTIVE SUMMARY

Rising prices and economic pressures continue to limit growth in hot drinks

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Volume sales stagnate as consumers continue to battle with cost-of-living pressures

Players focus on offering quality products to sustain demand

Consumers look for indulgence without a higher price tag

WHAT'S NEXT?

Expansion of the UK's HFSS regulations set to push healthier options

The digital market opening up opportunities for hot drinks

Producers under mounting pressure to adopt more ethical practices

COMPETITIVE LANDSCAPE

Nestlé retains the lead through constant innovation and new product development
Keurig and JDE Peets merger expected to shake up the coffee market

CHANNELS

Hypermarkets and supermarkets continue to dominate sales in 2025
Foodservice demand shaping the retail market

MARKET DATA

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
Table 13 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
Table 14 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
Table 15 - Retail Sales of Hot Drinks by Category: Value 2020-2025
Table 16 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 17 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
Table 18 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
Table 19 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 20 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
Table 21 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
Table 22 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
Table 23 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
Table 24 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
Table 25 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
Table 26 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
Table 28 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
Table 29 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
Table 30 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 32 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
Table 34 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 35 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
Table 36 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/coffee-in-the-united-kingdom/report.