



Coffee in the US

November 2025

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Coffee in the US - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Supply constraints and tariffs raise prices, driving retail value growth

INDUSTRY PERFORMANCE

Continued price rises prevent volume growth but drive value growth

Economic uncertainty drives instant coffee to see the strongest growth

WHAT'S NEXT?

Pressures expected to continue, driving value growth and marginal volume decline

The application of technology in coffee

Sustainability likely to remain an aim, but challenging to achieve

COMPETITIVE LANDSCAPE

Keurig extends its share, but second-placed JM Smucker sees stronger growth

Black Rifle Coffee maintains its dynamic growth trend

CHANNELS

Retail e-commerce continues its long-standing rising trend as consumers seek convenience

Price promotions and wide product range are attracting more consumers to shop online

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Hot Drinks in the US - Industry Overview

EXECUTIVE SUMMARY

Retail value sales maintain their rising trend, although volume sales decline

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Competition from outside of hot drinks and rising prices hamper volume growth

Premium functional tea and coffee still see growth opportunities

Increasing interest in health helps maintain the popularity of hot drinks

Climate crises and tariffs impact the prices of imported hot drinks

WHAT'S NEXT?

Value growth anticipated, but volume growth potential will be impacted by competition and price rises

Intentional consumption will offer opportunities for products offering benefits

Splitting of hot drinks and soft drinks businesses likely to be seen

COMPETITIVE LANDSCAPE

Keurig extends its lead in hot drinks thanks to its wide portfolio in fresh coffee
The surge in sales of instant coffee benefits the leader in this category, Nescafé

CHANNELS

Retail e-commerce leads across categories
Nespresso is particularly successful with online sales
The foodservice offering is compelling

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