

## Coffee and RTD Coffee: Incl Impact of COVID-19 - US - July 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The at home coffee market will benefit more than any non-alcoholic beverage category from the short and long term changes brought about by COVID-19 and the recession.”

– **Caleb Bryant, Associate Director of Food and Drink Reports**

This report looks at the following areas:

- The impact of COVID-19 on consumer behavior and the coffee market.
- How the recession will benefit the coffee market
- Creamer market trends
- Gen Z coffee preferences

The home coffee market will greatly benefit from many of the changes brought about by the pandemic. The rapid rise of consumers working from home will lead to an increase in the total volume of coffee sold and consumers will seek to create their own coffee house specialty drinks; indicating a prime opportunity for products that turn consumers into baristas. Consumers will cut back on coffee sourced from foodservice outlets and instead treat themselves to affordable retail coffee options.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](https://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Coffee and RTD Coffee: Incl Impact of COVID-19 - US - July 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know  
Key issues covered in this Report  
Definition

### Executive Summary

Top takeaways  
Market overview  
Figure 1: Total US retail sales and forecast of coffee and RTD coffee, at current prices, 2015-25  
Impact of COVID-19 on coffee  
Figure 2: Short, medium and long term impact of COVID-19 on coffee, July 2020  
Opportunities and Challenges  
Re-emergence  
Figure 3: Total US retail sales of coffee, 2009-13  
Recovery  
Figure 4: Coffee attribute interest, any coffee, by generation, April 2020  
COVID-19: coffee context

### The Market – What You Need to Know

Coffee market enters a growth period  
Pandemic removes foodservice competition  
Working from home creates long-lasting opportunities

### Market Size and Forecast

Pandemic benefits coffee and creamer markets  
Figure 5: Total US retail sales and forecast of coffee and RTD coffee, at current prices, 2015-25  
Figure 6: Total US retail sales and forecast of coffee and RTD coffee, at current prices, 2015-25  
Figure 7: Total US retail sales and forecast of cream and creamer, at current prices, 2015-25  
Figure 8: Total US retail sales and forecast of cream and creamer, at current prices, 2015-25

### Market Breakdown

Roasted and single-cup coffee set for future growth  
Figure 9: Total US retail sales and forecast of coffee and RTD coffee, by segment, 2015-25  
Figure 10: Total US retail sales and forecast of coffee and RTD coffee, by segment, 2015-25  
Figure 11: Single-cup machine, espresso maker ownership, 2014-19  
Figure 12: Total US retail sales and forecast of cream and creamer, at current prices, 2015-25

### Market Perspective

Coffee shops' loss is a win for at-home coffee  
Energy drinks deliver the caffeine consumers crave

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Coffee and RTD Coffee: Incl Impact of COVID-19 - US - July 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Coffee takes on many forms

### Market Factors

A nationwide shift to working from home is a long-lasting windfall for the market

Figure 13: Employed workers who have worked remotely due to the pandemic, March 13-April 2, 2020

Unemployment offers opportunity

Figure 14: Total US retail sales of coffee, 2009-13

Figure 15: Total US retail sales of coffee, 2009-13

### Key Players – What You Need to Know

Newly at-home workers will upgrade their coffee

Creamer innovation can meet the moment

Be prepared for an RTD slowdown

Turn consumers into baristas

### Company and Brand Sales of Coffee

Foodservice coffee comes home

Figure 16: Multi-outlet sales of roasted coffee, by leading companies and brands, rolling 52 weeks 2019 and 2020

### What's Working

Instant success

Figure 17: Total US retail sales of instant coffee, 2009-20

Figure 18: Social media mentions of Dalgona coffee and instant coffee over time, February 15-June 15, 2020

Premium and foodservice-branded coffee will be affordable luxuries

Creamer makes the money

Big brands can focus on flavor

Plant-based creamers follow the growth of other non-dairy products

Functionality through creamers

### What's Struggling

Biggest brands still can't catch a break

RTD coffee will need to rethink packaging

### What's Next

Replicate the coffee house experience at home

Mushroom coffees and coffee alternatives trend among the professional class

### The Consumer – What You Need to Know

Gen Z has not graduated from RTDs

Cold coffee drinks face competition

Variety and innovation appeal to coffee enthusiasts

### Coffee Consumption

Opportunity for less common coffee beverages

Figure 19: Coffee consumption, April 2020

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Coffee and RTD Coffee: Incl Impact of COVID-19 - US - July 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Less than half of Gen Z consumers drink roasted coffee

Figure 20: Coffee consumption, by generation, April 2020

Coffee is not connecting with young men

Figure 21: Coffee consumption, by age and gender, April 2020

Opportunity for premium single-cup coffee

Figure 22: Coffee consumption, by age and household income, April 2020

## Coffee Consumption by Occasion

Hot mornings, cool afternoons

Figure 23: Correspondence analysis – Principal map – Types of coffee consumed by occasion, April 2020

## Retailers Shopped for Coffee

Coffee is ideal for ecommerce

Figure 24: Retailers shopped for coffee, April 2020

Figure 25: Demographics of consumers who purchase coffee online indexed against all coffee drinkers, April 2020

Retailers should expand their selection of premium coffee

Figure 26: Retailers shopped for coffee, by coffee enthusiasts, April 2020

## Coffee Consumption Frequency

Cold coffee drinks are not habitually consumed

Figure 27: Coffee consumption frequency, among consumers of each coffee format, April 2020

## Coffee Behaviors

Younger consumers experiment with brands

Figure 28: Coffee behaviors, April 2020

Figure 29: Coffee behaviors, by generation, April 2020

Figure 30: Coffee behaviors, by coffee enthusiasts, April 2020

## Coffee Purchase Drivers

Variation appeals to coffee enthusiasts

Figure 31: Coffee purchase drivers, by coffee enthusiasts, April 2020

## Coffee Attribute Interest

Creamer can enhance the functionality of coffee

Figure 32: Coffee attribute interest, any coffee, April 2020

Younger women respond to functional claims

Figure 33: Coffee attribute interest, any coffee, by generation, April 2020

Figure 34: Coffee attribute interest, any coffee, by gender/age, April 2020

Coffee enthusiasts want it all

Figure 35: Coffee attribute interest, any coffee, by coffee enthusiast, April 2020

Single-cup espresso brands can differentiate through functionality

Figure 36: Coffee attribute interest, retail, by coffee types consumed, April 2020

## Coffee Attitudes

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Coffee and RTD Coffee: Incl Impact of COVID-19 - US - July 2020

Report Price: £3254.83 | \$4395.00 | €3662.99

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Consumers will still spend money on premium coffee

Figure 37: Coffee attitudes, April 2020

Figure 38: Coffee attitudes, by gender/age, April 2020

## Retail brands can connect with Gen Z but don't forget Gen X

Figure 39: Coffee attitudes, by generation, April 2020

Figure 40: Coffee attitudes, by age/income, April 2020

## Appendix – Data Sources and Abbreviations

Data sources

Sales data

Forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

## Appendix – The Market

Figure 41: Total US retail sales and forecast of coffee and RTD coffee, at inflation-adjusted prices, 2015-25

Figure 42: Total US retail sales and forecast of roasted coffee, at inflation-adjusted prices, 2015-25

Figure 43: Total US retail sales and forecast of single-cup coffee, at inflation-adjusted prices, 2015-25

Figure 44: Total US retail sales and forecast of instant coffee, at inflation-adjusted prices, 2015-25

Figure 45: Total US retail sales and forecast of RTD coffee, at inflation-adjusted prices, 2015-25

Figure 46: Total US retail sales of coffee and RTD coffee, by channel, at current prices, 2015-20

Figure 47: Total US retail sales of coffee and RTD coffee, by channel, at current prices, 2018 and 2020

Figure 48: Total US retail sales and forecast of cream and creamer, at inflation-adjusted prices, 2015-25

Figure 49: Total US retail sales of cream and creamer, by segment, at current prices, 2018 and 2020

Figure 50: Total US retail sales and forecast of cream, at inflation-adjusted prices, 2015-25

Figure 51: Total US retail sales and forecast of creamer, at inflation-adjusted prices, 2015-25

Figure 52: Total US retail sales of cream and creamer, by channel, at current prices, 2015-20

## Appendix – Key Players

Figure 53: Multi-outlet sales of coffee and RTD coffee, by leading companies, rolling 52 weeks 2019 and 2020

Figure 54: Multi-outlet sales of single-cup coffee, by leading companies and brands, rolling 52 weeks 2019 and 2020

Figure 55: Multi-outlet sales of instant coffee, by leading companies and brands, rolling 52 weeks 2019 and 2020

Figure 56: Multi-outlet sales of RTD coffee, by leading companies and brands, rolling 52 weeks 2019 and 2020

Figure 57: Multi-outlet sales of cream and creamers, by leading companies, rolling 52 weeks 2019 and 2020

Figure 58: Multi-outlet sales of cream, by leading companies and brands, rolling 52 weeks 2019 and 2020

Figure 59: Multi-outlet sales of creamers, by leading companies and brands, rolling 52 weeks 2019 and 2020

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)