On-premise Coffee Consumption - China - 2022

Report Price: £3695 | $4995 | €4400

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This report looks at the following areas:

- **Market value and volume of on-premise coffee**
- **Innovative product launches and marketing activities for on-premise coffee**
- **Consumers' perception of on-premise coffee offerings**
- **Usage of on-premise digital services**
- **Consumers' attitudes towards specialty coffee**

The on-premise coffee business in China will be robust in the following years, led by key market players. The estimated CAGR for the next five years is 25.9%.

Market uncertainties brought by COVID resurgences have heavily impacted the on-premise coffee business, especially individual coffee shops. While chain brands, usually leading players, are in a better position with more resources to manage risks. For new brands to survive better in this situation, Chengdu can be a suitable location with lower fixed costs and similar consumption penetration compared to tier 1 cities.

Meanwhile, the supply of green beans challenges the Chinese coffee market, with the international supply chain greatly affected by the lockdown and a price increase due to production deficiency on the global scale. This points to the need for backup plantation/suppliers to ensure a stable supply of raw materials for local brands.

Digitalisation can benefit both consumers and brands' employee management. Owning the data can broadly support the brands' strategy and decision-making. NPD of drinks in on-premise coffee houses hasn't seen a bipolar trend – black coffee vs special coffee drinks. Current consumers favour special drinks featuring fresh fruits and alcohol. However, the base of these drinks is mostly black coffee, which can eventually build consumption for the black coffee market.

"China's coffee market is still at an early stage with high growth potential that can be accelerated with store expansion and omnichannel marketing. Diversified special coffee drinks are favoured by most coffee drinkers in China and have become a sales booster for on-premise coffee brands in the past year."
– Bernie Gao, Research Analyst

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