



Passport

Coffee in Portugal

Euromonitor International

December 2020

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COFFEE IN PORTUGAL

KEY DATA FINDINGS

- Coffee suffers a significant decline in on-trade volume sales in 2020 due to COVID-19, driven by the closure of on-trade outlets, with dynamic off-trade volume growth unable to completely offset the decline
- Off-trade current value sales of coffee increase by 23% in 2020 to reach EUR566 million, whilst off-trade volume sales increase by 18% to reach 17,614 tonnes
- Whilst off-trade volumes increase strongly in 2020, on-trade volumes see a sharp decline, falling by 27% to 10,123 tonnes
- Nestlé Portugal extends its lead in coffee in 2020, with a 39% off-trade value share, followed by Novadelta - Comércio e Indústria de Cafés with 22%
- Over the forecast period, off-trade sales of coffee are expected to rise by a current value CAGR of 2% (1% 2020 constant value CAGR), and off-trade volume sales are expected to increase by a CAGR of 1%, to reach EUR631 million and 18,090 tonnes

2020 IMPACT

Dynamic off-trade volume growth unable to compensate for on-trade decline

After seeing slow but stable total volume growth for most of the review period, in 2020 coffee has seen a slow decline as a result of COVID-19. However, whilst the on-trade channel has seen a significant decline, the off-trade channel has seen dynamic growth. Sales via foodservice outlets were severely affected during the lockdown in 2020, as all non-essential businesses were closed, which affected sales of all hot drinks, including coffee. In addition, there was lower footfall on reopening. Social distancing meant lower capacity in outlets, and opening hours were limited, whilst many people continued to work and study from home, hampering the return to growth in the second half of the year. In addition, due to furlough and redundancies, many consumers were careful with their budgets and did not have drinks outside of the home as often as before. Maybe most importantly, demand from tourists saw a strong decline due to the decline in arrivals.

Coffee has therefore registered a strong shift from on-trade to off-trade consumption in 2020, due to greater consumption of coffee in the home. Although this has led to double-digit off-trade volume growth, this has not been enough to compensate for the on-trade volume decline, leading to a total volume decline. Current value sales have suffered an stronger on-trade decline, as the premiumisation trend, which is more visible in foodservice, was severely affected by business closures.

Fresh ground coffee pods continues to lead off-trade volume growth

Although both fresh and instant coffee have seen much higher growth rates in 2020, the trend seen over the review period has been maintained, with fresh coffee seeing a better performance than instant coffee in off-trade volume terms. Although instant coffee offers convenience, more consumers are being attracted to the better taste of fresh coffee. Again, fresh ground coffee pods has seen the strongest growth, which offer the greatest convenience within fresh coffee. The so-called third wave of coffee is hitting the Portuguese coffee landscape. Portuguese

consumers are willing to experiment with new coffee products and want to improve their coffee experience, in a country with a strong coffee culture. The country's openness to novelty and the influence from other Western European and North American markets is fostering the development of alternatives to traditional espresso coffee, with pod systems proliferating in Portuguese homes, and consumers needing to make repeat purchases of the appropriate pods. Due to the wide variety of pods available, consumers are able to have a high-quality, differentiated coffee experience, with varieties such as latte and cappuccino now available.

Fresh ground coffee pods has seen a boom in the number of companies offering solutions compatible with proprietary pod systems. Kaffa, Torrié, L'Or and private label lines have increased their presence in the marketplace, offering different compatible products at lower prices than proprietary brands. As a response, proprietary companies launched larger packs of 30 and 40 pods, thus lowering the price per unit, as well as increasing price promotions in retail.

Agreement between Nestlé and Starbucks starts to affect the competitive landscape

Nestlé Portugal has continued to lead coffee in off-trade value terms in 2020. It has seen a strong increase in its value share thanks to its strength in the highest-growth category, fresh ground coffee pods with its brands Nespresso and Nescafé Dolce Gusto, as well as the 2020 launch of the Starbucks brand. An agreement was reached between Nestlé and Starbucks at the end of 2019, with Starbucks entering the off-trade channel in categories such as fresh coffee beans and fresh ground coffee pods. With the on-trade channel suffering from closures and low footfall, it was perfect timing for the agreement for both companies. This has contributed to Nestlé Portugal reinforcing its leading position in the category in 2020, and has already given it a competitive advantage for 2021, as it is not expected that the on-trade channel will immediately recover to the pre-COVID-19 level of sales.

Although not seeing such a strong value share increase as Nestlé, second-placed Delta Q from Novadelta - Comércio e Indústria de Cafés has also seen a slight share increase in 2020, due to the launch of 100% biodegradable hard pods, Delta Q eQo, in the second half of 2019. Private label also holds a significant value share within coffee, although has seen a slight share decline in 2020 as consumers moved to well-known, good-quality, trusted brands at a time of crisis. Although an increasing portfolio of private label products was seen in coffee towards the end of the review period, this was more a repositioning and strategic move, and has not led to strong growth. However, the market entry of Spanish retail giant Mercadona with its very strong private label portfolio could have a positive impact on the private label share in the forecast period.

Players within coffee need to reach out to consumers wherever they may shop. Due to the online sales strategy of the main companies, e-commerce already accounted for a higher share of sales in coffee than in many other fmcg categories. For instance, Nespresso sells its coffee pods online, whilst the Kaffa brand from Galvão & Noronha has a subscription option, which offers 25% off the regular selling price. Nonetheless, in 2020 e-commerce has seen a strong increase in its share, due to the strong switch to this channel as a result of COVID-19. Retailers and manufacturers accelerated their online strategies, whilst consumers were keen to make purchases online to avoid having to leave their homes and potentially contracting the virus. Although some consumers returned to store-based retailers after the end of the lockdown, online sales have remained high, and the overall share of sales accounted for by e-commerce is expected to continue to grow over the coming years.

RECOVERY AND OPPORTUNITIES

On-trade sales will take time to recover to pre-pandemic levels

After seeing an exceptionally strong increase in off-trade sales during 2020, coffee is set to turn to decline in 2021, losing some of the ground gained in the previous year. This is because as the virus comes under better control and restrictions on the opening of foodservice outlets are eased, consumers are expected to start to return to on-trade outlets. Not only are locals likely to return, but it is also hoped that tourists will start to return to the country and spend in on-trade outlets, leading to a switch back from off-trade to on-trade consumption. Tourist demand will support the development of coffee shops offering new ways of consuming coffee and new coffee-based beverages, in a country where espresso was previously omnipresent. However, an immediate return to the level of on-trade sales seen before the pandemic, in 2019, is not expected. Even if restrictions are eased, some consumers are likely to be slow to return, due to concerns about contracting the virus and also lower incomes as a result of the economic impact of measures taken to control its spread. Meanwhile, some outlets have had to close permanently due to the impact of closures. Therefore, on-trade volume sales are not expected to return to the 2019 level until the end of the forecast period.

Meanwhile, despite the declines forecast for the off-trade channel in 2021, sales are not expected to fall back to the level seen in 2019, and from 2022 slow but steady off-trade volume growth is forecast. Home consumption of coffee is likely to remain high as consumers will tend to stay at home more for health reasons, whilst home working is expected to have seen a permanent rise in the country.

Fresh coffee set to drive growth as it offers A premium experience

Coffee is expected to present a positive total volume increase over the forecast period overall, mainly due to the strong performance of fresh coffee. Fresh ground coffee pods is expected to continue to drive growth, not only off-trade, but also on-trade, with a growing number of companies investing in developing higher-quality options and more outlets choosing the convenience of using pods, which are cleaner, give uniformity of flavour and save space. However, it is expected that a large number of consumers will also look for other versions of fresh coffee, such as standard fresh ground coffee, which is set to grow amongst consumers who are searching for more sustainable ways of consumption and looking for a slower lifestyle. Meanwhile, instant coffee is expected to see only low on-trade volume growth and a decline in the off-trade channel in the forecast period, as it does not offer the premium experience consumers are seeking. With consumers staying at home more and saving money, they are expected to be willing to invest in higher-quality coffee.

Differentiation and large pack sizes will remain important

With the standardisation brought about by coffee pods, whereby it is possible to find similar high-quality coffee with different systems, differentiation will need to be built around marketing, sourcing and production. For instance, brands and companies have already invested in certifying their products to prove sustainable practices, and have been launching special products to differentiate. For example, Delta followed the gastronomy and chef trends, launching the Delta Q Chef's Collection, a series of special blends prepared by renowned Portuguese chefs. Domestic companies have also tried to differentiate their offer from that of global coffee players by linking their products to local traditional values. Kaffa, for example, has built its pods offer around Portuguese traditions, as well as offering a Nespresso-compatible product line named after cities in the country. Meanwhile, Delta has an Origens blend called Portugal, marketed as being specifically tailored to the domestic taste. More such attempts at differentiation are expected to be seen in the forecast period.

No relevant price declines are expected for coffee in the forecast period. The strategy of companies is likely to remain close to what is currently visible, by offering larger pack sizes, and continuing to focus on single origins and speciality high-quality coffees, to encourage consumers to trade up. Delta has launched new pack formats in fresh coffee pods, including XXL EpiQ, intensity 14, with 60 units, and XXL Qcharacter, intensity 9, also with 60 units, resulting in a price of EUR0.27 per unit, vs EUR0.31 in the regular pack size (10 units).

CATEGORY DATA

Table 1 Retail Sales of Coffee by Category: Volume 2015-2020

Tonnes	2015	2016	2017	2018	2019	2020
Fresh Coffee	12,276.0	12,232.9	12,428.4	12,668.2	12,952.3	15,383.1
- Fresh Coffee Beans	1,951.9	1,836.4	1,722.9	1,588.9	1,611.9	1,692.0
- Fresh Ground Coffee	10,324.0	10,396.5	10,705.5	11,079.3	11,340.4	13,691.1
-- Fresh Ground Coffee Pods	4,834.6	5,115.1	5,520.2	5,972.9	6,329.4	8,073.8
-- Standard Fresh Ground Coffee	5,489.5	5,281.4	5,185.3	5,106.5	5,011.0	5,617.3
Instant Coffee	2,107.8	2,015.4	1,957.3	1,942.6	1,947.4	2,231.1
- Instant Standard Coffee	1,612.5	1,547.1	1,503.7	1,480.7	1,477.7	1,695.6
-- Regular Instant Standard Coffee	1,057.2	1,007.4	971.9	947.0	936.3	1,095.2
-- Decaffeinated Instant Standard Coffee	555.4	539.8	531.8	533.7	541.4	600.4
- Instant Coffee Mixes	495.3	468.2	453.6	461.9	469.7	535.6
-- Regular Instant Coffee Mixes	450.0	418.0	400.2	406.3	413.3	470.1
-- Decaffeinated Instant Coffee Mixes	45.2	50.3	53.4	55.6	56.4	65.4
Coffee	14,383.8	14,248.3	14,385.7	14,610.8	14,899.7	17,614.3

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 2015-2020

EUR million	2015	2016	2017	2018	2019	2020
Fresh Coffee	321.3	328.9	352.6	377.7	402.1	498.6
- Fresh Coffee Beans	21.0	19.9	19.6	18.8	19.4	20.7
- Fresh Ground Coffee	300.3	309.0	333.0	358.9	382.7	477.9
-- Fresh Ground Coffee Pods	254.9	264.6	288.2	313.0	336.4	425.4
-- Standard Fresh Ground Coffee	45.4	44.4	44.9	45.9	46.3	52.5
Instant Coffee	57.6	57.3	56.8	56.9	58.0	67.5
- Instant Standard Coffee	48.6	48.3	48.0	48.0	48.9	57.1
-- Regular Instant Standard Coffee	31.7	31.8	31.9	31.9	32.4	38.6
-- Decaffeinated Instant Standard Coffee	16.9	16.5	16.1	16.2	16.5	18.4
- Instant Coffee Mixes	9.0	9.0	8.8	8.9	9.1	10.5

-- Regular Instant Coffee Mixes	7.8	7.7	7.4	7.5	7.7	8.7
-- Decaffeinated Instant Coffee Mixes	1.2	1.3	1.4	1.4	1.5	1.7
Coffee	378.8	386.1	409.4	434.6	460.2	566.1

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 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Fresh Coffee	18.8	4.6	25.3
- Fresh Coffee Beans	5.0	-2.8	-13.3
- Fresh Ground Coffee	20.7	5.8	32.6
-- Fresh Ground Coffee Pods	27.6	10.8	67.0
-- Standard Fresh Ground Coffee	12.1	0.5	2.3
Instant Coffee	14.6	1.1	5.9
- Instant Standard Coffee	14.7	1.0	5.1
-- Regular Instant Standard Coffee	17.0	0.7	3.6
-- Decaffeinated Instant Standard Coffee	10.9	1.6	8.1
- Instant Coffee Mixes	14.0	1.6	8.1
-- Regular Instant Coffee Mixes	13.8	0.9	4.5
-- Decaffeinated Instant Coffee Mixes	16.0	7.7	44.7
Coffee	18.2	4.1	22.5

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 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Fresh Coffee	24.0	9.2	55.2
- Fresh Coffee Beans	6.5	-0.3	-1.4
- Fresh Ground Coffee	24.9	9.7	59.2
-- Fresh Ground Coffee Pods	26.5	10.8	66.9
-- Standard Fresh Ground Coffee	13.4	3.0	15.7
Instant Coffee	16.3	3.2	17.3
- Instant Standard Coffee	16.7	3.3	17.5
-- Regular Instant Standard Coffee	19.3	4.1	22.0
-- Decaffeinated Instant Standard Coffee	11.6	1.7	8.9
- Instant Coffee Mixes	14.5	3.0	16.2
-- Regular Instant Coffee Mixes	14.2	2.3	11.8
-- Decaffeinated Instant Coffee Mixes	16.3	7.7	44.9
Coffee	23.0	8.4	49.4

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

Table 5 Retail Sales of Fresh Coffee by Regular vs Decaffeinated: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
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Decaffeinated	6.5	6.6	6.6	6.6	6.6	6.3
Total	100.0	100.0	100.0	100.0	100.0	100.0
Regular	93.5	93.4	93.4	93.4	93.4	93.7

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 Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Hard Coffee Pods	99.7	99.7	99.8	99.9	99.9	99.9
Soft Coffee Pods	0.3	0.3	0.2	0.1	0.1	0.1
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

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

Table 7 NBO Company Shares of Coffee: % Retail Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
Nestlé Portugal SA	39.1	37.7	37.6	38.0	39.4
Novadelta - Comércio e Indústria de Cafés SA	21.6	21.5	21.5	21.7	21.8
JMDB - Representação e Distribuição de Marcas Lda	-	5.2	5.1	5.1	5.0
Nutricafés - Cafés e Restauração SA	5.2	4.9	4.6	4.3	4.3
Sonae Modelo Continente Hipermercados SA	3.6	3.6	3.7	4.0	3.8
Galvão & Noronha Lda	2.2	2.4	2.5	2.1	2.1
Mondelez Portugal, Unipessoal Lda	2.0	2.0	1.9	1.8	1.8
Segafredo Zanetti SpA	0.9	0.8	0.7	0.6	0.5
Grupo JMV	0.2	0.3	0.3	0.3	0.3
New Coffee Co	0.3	0.3	0.3	0.3	0.3
Jerónimo Martins - Distribuição de Produtos de Consumo Lda	5.8	-	-	-	-
Kraft Foods Portugal Produtos Alimentares Lda	-	-	-	-	-
Other Private Label	9.8	9.4	8.6	8.4	8.2
Others	9.2	11.8	13.2	13.2	12.4
Total	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 8 LBN Brand Shares of Coffee: % Retail Value 2017-2020

% retail value rsp

Brand (GBO)	Company (NBO)	2017	2018	2019	2020
Nespresso (Nestlé SA)	Nestlé Portugal SA	14.9	15.1	15.7	16.5
Delta Q (Group Nabeiro)	Novadelta - Comércio e Indústria de Cafés SA	14.8	15.2	15.5	16.1
Nescafé Dolce Gusto (Nestlé SA)	Nestlé Portugal SA	11.8	12.0	12.2	12.9
Delta (Group Nabeiro)	Novadelta - Comércio e Indústria de Cafés SA	5.5	5.2	5.1	4.7
Pingo Doce (Private Label)	JMDB - Representação e Distribuição de Marcas Lda	4.9	4.7	4.5	4.4
Nicola (Massimo Zanetti Beverage Group SpA)	Nutricafés - Cafés e Restauração SA	4.9	4.6	4.3	4.3
Continente (Private Label)	Sonae Modelo Continente Hipermercados SA	3.6	3.7	4.0	3.8
Nescafé (Nestlé SA)	Nestlé Portugal SA	4.1	4.0	4.0	3.8
Nescafé Gold (Nestlé SA)	Nestlé Portugal SA	2.8	2.6	2.5	2.4
Kaffa	Galvão & Noronha Lda	2.4	2.5	2.1	2.1
Tassimo (JDE Peet's BV)	Mondelez Portugal, Unipessoal Lda	-	-	-	1.8
Sical (Nestlé SA)	Nestlé Portugal SA	2.1	2.1	2.0	1.8
Nescafé Cappuccino (Nestlé SA)	Nestlé Portugal SA	0.9	0.9	0.8	0.8
Buondi (Nestlé SA)	Nestlé Portugal SA	0.9	0.8	0.7	0.6
L'Or Espresso (JDE Peet's BV)	JMDB - Representação e Distribuição de Marcas Lda	-	-	-	0.6
Starbucks (Nestlé SA)	Nestlé Portugal SA	-	-	-	0.5
Segafredo (Massimo Zanetti Beverage Group SpA)	Segafredo Zanetti SpA	0.7	0.6	0.5	0.5
Torrié	Grupo JMV	0.3	0.3	0.3	0.3
Lavazza A Modo Mio (Lavazza SpA, Luigi)	New Coffee Co	0.3	0.3	0.3	0.3
Nescafé others (Nestlé SA)	Nestlé Portugal SA	0.1	0.2	0.2	0.1
Segafredo Intermezzo (Massimo Zanetti Beverage Group SpA)	Segafredo Zanetti SpA	0.1	0.1	0.1	0.1
Tassimo (Jacobs Douwe Egberts)	Mondelez Portugal, Unipessoal Lda	2.0	1.9	1.8	-
L'Or Espresso (Jacobs Douwe Egberts)	JMDB - Representação e Distribuição de Marcas Lda	0.3	0.4	0.5	-
Pingo Doce (Private Label)	Jerónimo Martins - Distribuição de Produtos de Consumo Lda	-	-	-	-
Tassimo (Kraft Foods Inc)	Kraft Foods Portugal Produtos Alimentares Lda	-	-	-	-
Tassimo (Mondelez International Inc)	Kraft Foods Portugal Produtos Alimentares Lda	-	-	-	-
Tassimo (Mondelez International Inc)	Mondelez Portugal, Unipessoal Lda	-	-	-	-
A Caféeira (Unicer - Bebidas de Portugal SA)	New Coffee Co	-	-	-	-
Lavazza (Lavazza SpA, Luigi)	New Coffee Co	-	-	-	-
Other Private Label	Other Private Label	9.4	8.6	8.4	8.2

(Private Label)					
Others	Others	13.1	14.3	14.3	13.4
Total	Total	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 9 Forecast Retail Sales of Coffee by Category: Volume 2020-2025

Tonnes	2020	2021	2022	2023	2024	2025
Fresh Coffee	15,383.1	14,905.8	15,257.5	15,556.5	15,866.3	16,088.9
- Fresh Coffee Beans	1,692.0	1,744.9	1,785.2	1,802.5	1,800.8	1,781.0
- Fresh Ground Coffee	13,691.1	13,160.9	13,472.3	13,753.9	14,065.5	14,307.9
-- Fresh Ground Coffee Pods	8,073.8	7,739.9	7,996.2	8,181.7	8,385.9	8,491.8
-- Standard Fresh Ground Coffee	5,617.3	5,421.1	5,476.2	5,572.2	5,679.6	5,816.1
Instant Coffee	2,231.1	2,047.8	2,001.1	1,990.1	1,994.5	2,001.2
- Instant Standard Coffee	1,695.6	1,559.6	1,518.9	1,498.1	1,492.3	1,491.3
-- Regular Instant Standard Coffee	1,095.2	987.2	959.6	954.5	963.3	975.6
-- Decaffeinated Instant Standard Coffee	600.4	572.4	559.3	543.6	529.0	515.8
- Instant Coffee Mixes	535.6	488.2	482.3	492.0	502.2	509.8
-- Regular Instant Coffee Mixes	470.1	428.2	421.5	429.4	438.3	445.2
-- Decaffeinated Instant Coffee Mixes	65.4	60.1	60.8	62.6	63.9	64.6
Coffee	17,614.3	16,953.6	17,258.7	17,546.5	17,860.8	18,090.1

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

Table 10 Forecast Retail Sales of Coffee by Category: Value 2020-2025

EUR million	2020	2021	2022	2023	2024	2025
Fresh Coffee	498.6	477.1	486.0	495.2	509.9	519.7
- Fresh Coffee Beans	20.7	21.5	22.2	22.8	23.1	23.3
- Fresh Ground Coffee	477.9	455.6	463.8	472.4	486.8	496.4
-- Fresh Ground Coffee Pods	425.4	403.2	410.1	417.1	429.3	437.0
-- Standard Fresh Ground Coffee	52.5	52.4	53.6	55.3	57.5	59.4
Instant Coffee	67.5	63.2	62.5	62.6	63.5	64.4
- Instant Standard Coffee	57.1	53.4	52.8	52.6	53.1	53.7
-- Regular Instant Standard Coffee	38.6	35.8	35.3	35.3	36.0	37.0
-- Decaffeinated Instant Standard Coffee	18.4	17.7	17.5	17.3	17.1	16.7
- Instant Coffee Mixes	10.5	9.7	9.8	10.1	10.4	10.7
-- Regular Instant Coffee Mixes	8.7	8.2	8.1	8.4	8.7	8.9
-- Decaffeinated Instant Coffee Mixes	1.7	1.6	1.6	1.7	1.7	1.8
Coffee	566.1	540.3	548.5	557.9	573.4	584.1

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

Table 11 Forecast Retail Sales of Coffee by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Fresh Coffee	-3.1	0.9	4.6
- Fresh Coffee Beans	3.1	1.0	5.3
- Fresh Ground Coffee	-3.9	0.9	4.5
-- Fresh Ground Coffee Pods	-4.1	1.0	5.2
-- Standard Fresh Ground Coffee	-3.5	0.7	3.5
Instant Coffee	-8.2	-2.2	-10.3
- Instant Standard Coffee	-8.0	-2.5	-12.0
-- Regular Instant Standard Coffee	-9.9	-2.3	-10.9
-- Decaffeinated Instant Standard Coffee	-4.6	-3.0	-14.1
- Instant Coffee Mixes	-8.8	-1.0	-4.8
-- Regular Instant Coffee Mixes	-8.9	-1.1	-5.3
-- Decaffeinated Instant Coffee Mixes	-8.2	-0.2	-1.2
Coffee	-3.8	0.5	2.7

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

Table 12 Forecast Retail Sales of Coffee by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Fresh Coffee	-4.3	0.8	4.2
- Fresh Coffee Beans	4.0	2.4	12.6
- Fresh Ground Coffee	-4.7	0.8	3.9
-- Fresh Ground Coffee Pods	-5.2	0.5	2.7
-- Standard Fresh Ground Coffee	-0.1	2.5	13.2
Instant Coffee	-6.4	-0.9	-4.6
- Instant Standard Coffee	-6.4	-1.2	-5.8
-- Regular Instant Standard Coffee	-7.5	-0.9	-4.2
-- Decaffeinated Instant Standard Coffee	-4.1	-1.9	-9.2
- Instant Coffee Mixes	-6.8	0.5	2.5
-- Regular Instant Coffee Mixes	-6.6	0.5	2.3
-- Decaffeinated Instant Coffee Mixes	-7.6	0.6	3.0
Coffee	-4.6	0.6	3.2

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

Table 13 Forecast Retail Sales of Fresh Coffee by Regular vs Decaffeinated: % Volume 2020-2025

% retail volume	2020	2021	2022	2023	2024	2025
Decaffeinated	6.3	5.9	5.7	5.7	5.7	5.7
Total	100.0	100.0	100.0	100.0	100.0	100.0
Regular	93.7	94.1	94.3	94.3	94.3	94.3

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