Euromonitor International

Cafés/Bars in the US

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Cafés/Bars in the US - Category analysis

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2025 DEVELOPMENTS

Innovation and polarisation in cafés/bars

INDUSTRY PERFORMANCE

Cafés/bars sees growth, with juice/smoothie bars leading the way
Chained juice/smoothie bars benefits from a visible focus on whole foods and health
An on-the-go society continues to demand customisation and speed from its caffeine

WHAT'S NEXT?

Growth to abound for beverages, an area with endless customisation and potential
Fulfilment in cafés/bars set to head in opposite directions over the forecast period
Will Luckin Coffee disrupt cafés/bars?

COMPETITIVE LANDSCAPE

Starbucks continues to lead cafés/bars, but it must pivot to stay ahead
Dutch Bros sets its eyes on food as it continues its march across the country
Brand loyalty and large footprints give chained formats a slight edge in cafés/bars

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Consumer Foodservice in the US - Industry Overview

EXECUTIVE SUMMARY

Macroeconomic and policy disruptions reshape consumer foodservice

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Navigating operational volatility and the premiumisation of value
Brands adapt to capture value-conscious diners demanding convenience
Loyalty programmes and experiences connect with customers in a price-sensitive world

WHAT'S NEXT?

Challenges abound, but US consumers still love to eat
The legacy of GLP-1

Sustainability and health policy shifts

COMPETITIVE LANDSCAPE

The golden arches remain important in consumer foodservice in the US
Dutch Bros continues to see the winds blow in its favour
K-Brands and beyond continue to push experiential dining in the US market

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