

Hot Drinks in Mexico

November 2022

Table of Contents

Hot Drinks in Mexico

EXECUTIVE SUMMARY

Hot drinks in 2022: The big picture

2022 key trends

Competitive landscape

New challenges in last mile delivery

Foodservice vs retail split

What next for hot drinks?

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2017-2022

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2017-2022

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2017-2022

Table 4 - Retail Sales of Hot Drinks by Category: Value 2017-2022

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2017-2022

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2017-2022

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2017-2022

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2017-2022

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2017-2022

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2017-2022

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2018-2022

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2019-2022

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2017-2022

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2017-2022

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2022

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2022-2027

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2022-2027

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2022-2027

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2022-2027

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2022-2027

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2022-2027

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2022-2027

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2022-2027

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2022-2027

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Coffee in Mexico

KEY DATA FINDINGS

2022 DEVELOPMENTS

High prices impact company and consumer behaviours

Packaging developments offer consumers purchasing options

Premiumisation remains a key trend in coffee despite price concerns

PROSPECTS AND OPPORTUNITIES

Instant coffee continues its expansion while premiumisation offers a more dynamic growth avenue

Growing focus on digital sales and marketing

New price increases on the horizon

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2017-2022

Table 27 - Retail Sales of Coffee by Category: Value 2017-2022

Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2017-2022

Table 29 - Retail Sales of Coffee by Category: % Value Growth 2017-2022

Table 30 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2017-2022

Table 31 - NBO Company Shares of Coffee: % Retail Value 2018-2022

Table 32 - LBN Brand Shares of Coffee: % Retail Value 2019-2022

Table 33 - Forecast Retail Sales of Coffee by Category: Volume 2022-2027

Table 34 - Forecast Retail Sales of Coffee by Category: Value 2022-2027

Table 35 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2022-2027

Table 36 - Forecast Retail Sales of Coffee by Category: % Value Growth 2022-2027

Tea in Mexico

KEY DATA FINDINGS

2022 DEVELOPMENTS

Health and wellness trend keeps tea in focus

Packaging and product experimentations add dynamism to the category

Private label captures retail value share with lower prices for perceived similar quality products

PROSPECTS AND OPPORTUNITIES

Doubling down on functionality and health

Distribution shifts to cater to changing consumer demands

Retail and foodservice drive replication trend

CATEGORY DATA

Table 37 - Retail Sales of Tea by Category: Volume 2017-2022

Table 38 - Retail Sales of Tea by Category: Value 2017-2022

Table 39 - Retail Sales of Tea by Category: % Volume Growth 2017-2022

Table 40 - Retail Sales of Tea by Category: % Value Growth 2017-2022

Table 41 - NBO Company Shares of Tea: % Retail Value 2018-2022

Table 42 - LBN Brand Shares of Tea: % Retail Value 2019-2022

Table 43 - Forecast Retail Sales of Tea by Category: Volume 2022-2027

Table 44 - Forecast Retail Sales of Tea by Category: Value 2022-2027

Table 45 - Forecast Retail Sales of Tea by Category: % Volume Growth 2022-2027

Table 46 - Forecast Retail Sales of Tea by Category: % Value Growth 2022-2027

Other Hot Drinks in Mexico

KEY DATA FINDINGS

2022 DEVELOPMENTS

New labelling regulation impacts the offer and presentation of other hot drinks

Digital marketing opens up new opportunities for consumer engagement and insights

E-commerce maintains upward trend as consumers appreciate the channel's attributes

PROSPECTS AND OPPORTUNITIES

Healthier image to help other hot drinks ride the impact of new labelling rules

Other plant-based hot drinks is set for further development and penetration opportunities

Small local grocers to remain a key format but come under pressure from modern grocery retailers and e-commerce

CATEGORY DATA

Table 47 - Retail Sales of Other Hot Drinks by Category: Volume 2017-2022

Table 48 - Retail Sales of Other Hot Drinks by Category: Value 2017-2022

Table 49 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2017-2022

Table 50 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2017-2022

Table 51 - NBO Company Shares of Other Hot Drinks: % Retail Value 2018-2022

Table 52 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2019-2022

Table 53 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2022-2027

Table 54 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2022-2027

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2022-2027

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/hot-drinks-in-mexico/report.