

Hot Drinks in Russia

January 2022

Table of Contents

Hot Drinks in Russia

EXECUTIVE SUMMARY

Hot drinks in 2021: The big picture

2021 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for hot drinks?

Chart 1 - Hot Drinks Value Sales Growth Scenarios: 2019-2026

Chart 2 - Hot Drinks Impact of Drivers on Value Sales: 2019-2026

MARKET DATA

Table 1 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2016-2021

Table 2 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2016-2021

Table 3 - Retail Sales of Hot Drinks by Category: Volume 2016-2021

Table 4 - Retail Sales of Hot Drinks by Category: Value 2016-2021

Table 5 - Retail Sales of Hot Drinks by Category: % Volume Growth 2016-2021

Table 6 - Retail Sales of Hot Drinks by Category: % Value Growth 2016-2021

Table 7 - Foodservice Sales of Hot Drinks by Category: Volume 2016-2021

Table 8 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2016-2021

Table 9 - Total Sales of Hot Drinks by Category: Total Volume 2016-2021

Table 10 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2016-2021

Table 11 - NBO Company Shares of Hot Drinks: % Retail Value 2017-2021

Table 12 - LBN Brand Shares of Hot Drinks: % Retail Value 2018-2021

Table 13 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2016-2021

Table 14 - Retail Distribution of Hot Drinks by Format: % Volume 2016-2021

Table 15 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2021

Table 16 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2021-2026

Table 17 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2021-2026

Table 18 - Forecast Retail Sales of Hot Drinks by Category: Volume 2021-2026

Table 19 - Forecast Retail Sales of Hot Drinks by Category: Value 2021-2026

Table 20 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2021-2026

Table 21 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2021-2026

Table 22 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2021-2026

Table 23 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2021-2026

Table 24 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2021-2026

Table 25 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2021-2026

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Coffee in Russia

KEY DATA FINDINGS

2021 DEVELOPMENTS

Starbucks and Costa Coffee enter the retail channel as demand for barista-quality coffee at home rises

Instant coffee continues to struggle despite the efforts of the leading players to sustain demand

Nestlé and Jacobs Douwe Egberts retain their grip on the lead thanks to further expansion into fresh coffee

PROSPECTS AND OPPORTUNITIES

Fresh coffee set to benefit from Russia's burgeoning coffee culture
Health and wellness remains a niche area in coffee but with growth potential
Distribution landscape expected to inform the future of coffee in Russia

CATEGORY DATA

Table 26 - Retail Sales of Coffee by Category: Volume 2016-2021
Table 27 - Retail Sales of Coffee by Category: Value 2016-2021
Table 28 - Retail Sales of Coffee by Category: % Volume Growth 2016-2021
Table 29 - Retail Sales of Coffee by Category: % Value Growth 2016-2021
Table 30 - Retail Sales of Fresh Coffee by Regular vs Decaffeinated: % Volume 2016-2021
Table 31 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2016-2021
Table 32 - NBO Company Shares of Coffee: % Retail Value 2017-2021
Table 33 - LBN Brand Shares of Coffee: % Retail Value 2018-2021
Table 34 - Forecast Retail Sales of Coffee by Category: Volume 2021-2026
Table 35 - Forecast Retail Sales of Coffee by Category: Value 2021-2026
Table 36 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2021-2026
Table 37 - Forecast Retail Sales of Coffee by Category: % Value Growth 2021-2026
Table 38 - Forecast Retail Sales of Fresh Coffee by Regular vs Decaffeinated: % Volume 2021-2026

Tea in Russia

KEY DATA FINDINGS

2021 DEVELOPMENTS

Tea struggling as consumers embrace Russia's developing coffee culture
Trend two
Leading players cement their dominance, but traditional brand Azercay continues to climb the rankings

PROSPECTS AND OPPORTUNITIES

Black tea set to remain under pressure due to the rising consumption of coffee
New flavours and health and wellness claims set to boost sales of fruit/herbal tea
New product development expected to focus on fortification

CATEGORY DATA

Table 39 - Retail Sales of Tea by Category: Volume 2016-2021
Table 40 - Retail Sales of Tea by Category: Value 2016-2021
Table 41 - Retail Sales of Tea by Category: % Volume Growth 2016-2021
Table 42 - Retail Sales of Tea by Category: % Value Growth 2016-2021
Table 43 - NBO Company Shares of Tea: % Retail Value 2017-2021
Table 44 - LBN Brand Shares of Tea: % Retail Value 2018-2021
Table 45 - Forecast Retail Sales of Tea by Category: Volume 2021-2026
Table 46 - Forecast Retail Sales of Tea by Category: Value 2021-2026
Table 47 - Forecast Retail Sales of Tea by Category: % Volume Growth 2021-2026
Table 48 - Forecast Retail Sales of Tea by Category: % Value Growth 2021-2026

Other Hot Drinks in Russia

KEY DATA FINDINGS

2021 DEVELOPMENTS

Audience expanding for chocolate-based flavoured powder drinks with focus on indulgence
Trend two
Nestlé continues to invest in the expansion of its Nesquik brand

PROSPECTS AND OPPORTUNITIES

Strong and stable growth predicted for chocolate-based flavoured powder drinks thanks to enduring popularity among children
Economic pressures expected to influence demand for chicory
New product development expected to focus on health and wellness claims

CATEGORY DATA

Table 49 - Retail Sales of Other Hot Drinks by Category: Volume 2016-2021

Table 50 - Retail Sales of Other Hot Drinks by Category: Value 2016-2021

Table 51 - Retail Sales of Other Hot Drinks by Category: % Volume Growth 2016-2021

Table 52 - Retail Sales of Other Hot Drinks by Category: % Value Growth 2016-2021

Table 53 - NBO Company Shares of Other Hot Drinks: % Retail Value 2017-2021

Table 54 - LBN Brand Shares of Other Hot Drinks: % Retail Value 2018-2021

Table 55 - Forecast Retail Sales of Other Hot Drinks by Category: Volume 2021-2026

Table 56 - Forecast Retail Sales of Other Hot Drinks by Category: Value 2021-2026

Table 57 - Forecast Retail Sales of Other Hot Drinks by Category: % Volume Growth 2021-2026

Table 58 - Forecast Retail Sales of Other Hot Drinks by Category: % Value Growth 2021-2026

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-russia/report.