

# Hot drinks & cold brew

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# Leading innovation with L'Or

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☛ Coffee isn't just a morning pick-me-up any more; it's a lifestyle. Consumers increasingly see coffee as a product that can be tailored to their preferences and enjoyed in a variety of contexts throughout the day.

Thirty-one percent of people claim coffee is a passion for them<sup>1</sup> and JDE Peet's understands this evolving consumer landscape, putting innovation and premiumisation at the forefront of its product launches to meet the growing demand for diverse, high-quality coffee experiences, says Roberto de Felice, marketing director UK&I at Jacobs Douwe Egberts. "A key example of this is the L'Or Coffee Beans, which launched in October last year," he says.

"With 44% of shoppers now grinding their own coffee beans<sup>2</sup>, we recognise a powerful shift in how consumers want to experience coffee," explains De Felice. "Our new L'Or Coffee Beans have been carefully created to help shoppers upgrade their at-home drinking experiences and find the perfect high-quality bean to deliver an elevated coffee experience."

Available in grocery retail for the first time, the range includes three expertly crafted blends – Classique, Forza and Onyx – all within a convenient 200g format for maximum freshness. "The three different blends have been crafted to capture different strength preferences and to appeal to the diverse flavour profiles of 75% of the UK's coffee drinkers<sup>3</sup>, maximising market penetration and consumer appeal," he says.

**Drive personalisation, drive growth**

With younger consumers increasingly looking for choice, variety, and customisation in their coffee to match their individual taste, retailers that evolve their coffee range to meet these needs increase their chances of driving incremental growth, says De Felice. "With personalisation in mind, JDE Peet's expanded the Kenco Millicano range with three rich, creamy new drinks: Creamy Cappuccino, Smooth Latte and Cadbury Mocha," he reveals. "The new tin format also



“With 44% of shoppers now grinding their own coffee beans<sup>2</sup>, we recognise a powerful shift in how consumers want to experience their coffee. Our new L'Or Coffee Beans have been carefully created to help shoppers upgrade their at-home drinking experiences”

gives consumers ultimate flexibility, meaning coffee drinkers are now able to tailor their drinks to their mug size and taste preferences.”

Consumers are also becoming more conscious of the impact of recyclable packaging, with 76% of shoppers looking to recycle more<sup>4</sup>. With ease of recycling a significant barrier to this, JDE Peet's launched its revolutionary paper packaging. With 97% less packaging than a standard 200g glass jar, it allows consumers to easily recycle while still enjoying the same high-quality, fresh coffee.

“Our paper packs help to empower consumers to make greener choices by making it easier to recycle and driving wider adoption of refills – reducing packaging waste and removing plastic from retail supply chains.” De Felice adds.

**Looking forward to 2025**

“As we enter the new year, we are looking forward to making bigger strides in 2025, launching exciting innovations and building meaningful partnerships in order to bring more joy to the category and make the coffee aisle a destination in each store,” he concludes.

**Source**

<sup>1,2</sup> The Grocer, Category Report, Coffee is king of the cuppa: 10 charts that explain UK attitudes to coffee 2024, Rob Brown, August 2024  
<sup>3</sup> Engage Research, Understanding the Beans Consumer, U&A Study, June 2023  
<sup>4</sup> IGD Help Me Live Sustainably 2022



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Analysis

# Extracting a positive performance

**At-home quality is the name of the game for coffee and tea consumers, with cold brew, extracts and infusions coming to the fore. Plus, chilled and iced coffees are rapidly gaining market traction, as flavour options continue to develop**

With a volatile climate across the world in terms of both weather and finance, the attraction of staying indoors and entertaining at home holds increasing appeal.

During the colder months and in a post-Covid hybrid working environment, consumers are making more and more coffee and tea beverages at home. However, for coffees in particular, they are seeking the flavour and quality offered by baristas in out-of-home coffee shops. Meanwhile for teas, the focus is on health, taste and sustainability.

Yet, come the summer, longer drawn-out days spur the demand for iced and chilled drinks, both for out-of-home and at-home occasions – and it is here, in particular, that coffee companies are upping the ante, with new flavours and formats coming to the fore.

When looking at all outlets, the total hot beverages category grew to £2.2bn in 2024, up 3.2% in value sales and volume performance was also positive, with unit sales growing by 1.2% YOY<sup>1</sup>, reveals Dave Nicholls, commercial director of coffee for Nestlé UK & Ireland. “Within coffee, we are seeing some exciting trends within instant,” he notes. “The mixes segment (lattes, cappuccinos and mocha sachets) are growing at 7.5% to £12.7m and delivering 18.7% of the growth seen in the total beverages category<sup>2</sup>. We are also seeing growth in decaf coffee, with an additional 23.9m cups consumed in 2024 YoY<sup>3</sup>.”

Coffee is absolutely central to many people’s daily routines, shown by the positive uplift of +2.5% RSV across total coffee over the past year<sup>4</sup>, says Maria Kabalyk, head of category & shopper, UK & I at JDE Peet’s. “With the coffee

category now worth over £1.7bn<sup>5</sup> and more than 24m households in the UK buying coffee<sup>6</sup>, retailers can continue to benefit from the growing opportunity,” she says. “While the UK has historically been known as a nation of tea drinkers, Brits today drink more cups of coffee throughout the day than tea and many consider coffee one of the hardest beverages to go without<sup>7</sup>.”

Meanwhile, the demand for hot chocolate as a year-round beverage continues to grow, adds Kabalyk. “It was the third most consumed drink in coffee shops in the UK in 2024<sup>8</sup>.”

Ian Bryson, MD at Lincoln & York points to the ongoing high demand for – and continuing growth of – good-quality hot coffee in retail. “We’re seeing consistent growth in whole bean coffee purchases as consumers look to capture the premium quality of a coffee





shop at home,” he says. “Our research has also found that as engagement with coffee deepens, consumers are eager to try something new and are prepared to pay more for it. Almost half of those surveyed in our independent research said they would ‘always’, or ‘occasionally’ pay more to try a special blend or single origin coffee<sup>9</sup>.

“In line with this demand for premium coffee, whole bean sales are in growth across both value and volume, with an 11.7% increase in volume sales at the end of last year<sup>10</sup>,” he adds. “From our work supplying to retail customers, we know more consumers are coming to expect high-quality coffee not just out-of-home, but on every occasion. So, as we continue to bring out-of-home quality coffee to retail shelves, we anticipate this growth to remain steady.”

### **Growth potential for RTD coffee**

The ready-to-drink (RTD) chilled coffee category continues to go from strength to strength, worth more than £323m and growing in value and volume in GB<sup>11</sup>, says Helen Kerr, associate director – commercial development at Coca-Cola Europacific Partners (CEP), which handles the Costa Coffee RTD brand. “It is a highly incremental category<sup>12</sup> and, at the end of 2024, more than a quarter of UK households were purchasing RTD coffee<sup>13</sup>.”

Despite RTD coffee being a relatively new UK concept, the pace of category growth has been exceptional, and the sub-category has more than earned its place within all dairy drink fixtures, maintains Adam Hacking, head of beverages at Arla, which produces Starbucks’ RTD coffee.

“The category has experienced a

significant step forwards in terms of household penetration, average basket sizes and consumption growth, and has reached significant scale quickly,” he observes. “As a result, the RTD chilled coffee sub-category is now worth £316m<sup>14</sup>, and Starbucks chilled coffee is the leading player at £157m<sup>15</sup>, increasing by 8.8% value and 9.2% volume in the last 12 months<sup>16</sup>.

“Despite this level of growth, the fact that chilled coffee still has relatively low household penetration and distribution vs the wider soft drinks category means there is confidence in future growth potential.”

Now worth over £227m in the UK, the RTD iced coffee category is growing rapidly at +101% value since 2020 with 250ml cans by far the largest selling format with a 52% market share<sup>17</sup>, says Adrian Hipkiss, head of functional



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brands at AG Barr, owner of the Boost Iced Coffee brand. “Value brands are driving RTD iced coffee growth, with Boost now the fourth-largest brand in the sub-category with a 10% share of the market and growing +69% in the last three years<sup>18</sup>,” he says.

In the UK, the RTD iced coffee category, which includes cold brew, has shown strong growth, up 11% in value sales and 8% in volume sales<sup>19</sup>, agrees Tracey Mattock, marketing manager at Finlay Extracts & Ingredients. “The growth is being driven by flavoured iced coffees, predominantly dairy lattes or dairy-based lattes flavoured with caramel, mocha or vanilla. Dairy alternatives are also increasing in popularity with a number of online brands launching.”

### Premium experiences at home

Enjoying the coffee shop experience at home is a key trend, says Glesni Owen, head of sales at TrueStart Coffee. “Ours is the only instant coffee in the UK that we know of that uses speciality grade beans to make it – and that’s why we call it ‘Barista Grade’, she says. She also points to the popularity of premium quality coffee – “reflected in the data of brands that are seeing growth, such as Grind, Caravan, Pact and ourselves. TrueStart has grown by over 63% in value<sup>20</sup>,” she notes. “We think there will be continued focus from consumers on premium quality at accessible pricing, as well as a focus on health and wellbeing.”

Lincoln & York’s Bryson agrees that consumers are looking for new and better ways to recreate the coffee shop experience at home. “This spans everything from opting for premium whole beans or freshly ground coffee at home, to experimenting with flavours to recreate an out-of-home style moment of indulgence,” he notes.

“In line with the boost in whole bean sales, home coffee machine ownership has also increased exponentially since 2020 and is forecast to grow an additional 20% in the next five years<sup>21</sup>. Consumers’ search for premium at-home coffee is a trend that is here to stay and the bar for at-home coffee will continue to rise. This is why we are working with our customers to bring consistent out-of-home quality coffee to a retail audience at scale.”

At JDE Peet’s, Kabalyk also



**£1.7bn<sup>+1</sup>**

Value of the coffee category

**£12.7m/+7.5%<sup>2</sup>**

Value of mixes (lattes, cappuccinos and mocha sachets)

**+23.9m**

Cups of decaf coffee consumed in 2024 YOY<sup>3</sup>

**£316m<sup>4</sup>**

Value of RTD chilled coffee

Sources: 1 NielsenIQ Scantrack, Total Coverage, MAT w/e 28.12.24; 2+3 Circana All Outlets, 52 w/e 28.12.24, Value, Volume (cups and unit sales); 4 Nielsen, w/e 30.11.24

emphasises the premium coffee experience as being an essential trend. “Quality is the No.1 choice driver in coffee, but what quality looks like to shoppers is evolving. Increasingly, it not only includes ingredients, processes and sourcing but also branding, packaging and product appearance,” she says. “Shoppers expect quality from the entire coffee experience, not just the drink itself.”

To help shoppers recreate barista-quality coffee experiences in the home and upgrade their at-home drinking experience, the company launched new L’Or Coffee Beans in October last year. Also, with the in-home frothy coffee category seeing another strong year, with sales up 10%<sup>22</sup>, Kabalyk points to the company’s Kenco Iced/Hot instant latter, which can be served hot or cold to help retailers maximise their rate of sale throughout the entire year, she adds.

However, affordability and convenience are also key. Forty-six per



# Flavours favour coffee shop indulgence

Consumer demand for indulgent, coffee shop-style experiences at home shows no sign of slowing down, says JDE's Kabalyk. "This fuels growth in flavoured coffees, which now make up 39% of the speciality sector<sup>i</sup>. One of our biggest sellers over the past year is Kenco Iced/Hot available in Vanilla and Salted Caramel." Caramel and vanilla remain the top flavours among shoppers, she adds.

Indulgence is a key trend that will continue to play an important role in retail, says Lincoln & York's Bryson. "Our research shows that 52% of consumers

always or occasionally add flavoured syrups to their coffees<sup>ii</sup>. In line with this trend... indulgent flavours such as toffee nut latte and vanilla cookie dough are already popular across instant coffee and pods."

In addition, consumers always seem to be on the hunt for new inspiration and, this year, we expect to see the emergence of flavours at both ends of the spectrum, spanning both simple classics and more complex creations which recapture flavours of the past, he adds. "Classics like caramel, vanilla and hazelnut remain consumers' top three coffee flavours\*.

This year we're likely to see more focus on simplified, stripped-back flavours. Emerging now are single-flavour executions which see one clear flavour take the spotlight.

"We're also seeing the re-emergence of nostalgic flavours, with familiar, comforting flavours being re-imagined in hot beverages," he says. "From sticky toffee to tiramisu, and Bakewell Tart, the future of coffee flavours may be a blast from the past."

"In 2025, in the UK retail market we expect the key flavours of caramel, vanilla and mocha to remain popular paired

with either a dairy or a dairy-alternative latte base," notes Finlay's Mattock "In the out-of-home environment, rich and indulgent RTD coffees have been prominent in 2024 and are expected to remain popular this year too."

Across the RTD chilled coffee category, sweet flavours have continued to grow in popularity, with chocolate and caramel being the fastest-growing flavours, says Arla's Hacking.

Among the concepts Starbucks brought to the market last year, were a limited-edition offer for the festive season in Starbucks White Chocolate Mocha in a 750ml Multiserve format.

cent of consumers say they are cutting down on their coffee shop visits to save money<sup>23</sup> and 78% of in-home coffee cups are made using instant products<sup>24</sup>, says Kabalyk. "So we see a growing opportunity for premium instant coffee products that deliver rich, indulgent taste with minimum fuss while also costing significantly less per drink than your typical coffee shop order."

On a cooler note, iced beverages continue to be a popular option for consumers as an afternoon pick-me-up or a convenient beverage that travels well when on-the-go, says AG Barr's Hipkiss. "The growing demand for iced coffee now means one in three hot coffee drinkers prefer an iced coffee on a warm day<sup>25</sup>, with RTDs delivering a great, affordable treat that UK shoppers are increasingly looking for," he says.

As for cold brew coffee, four areas are driving growth – premiumisation, experience, health and natural energy, says Finlay's Mattock. To deliver on

these, cold brew captures the complex nuances of coffee, delivering a genuine roast and ground coffee flavour, she notes. In addition, it is less acidic and bitter than hot brew and is naturally sweet, so doesn't rely on added sugar to provide flavour.

"Cold brew offers differentiation in a crowded marketplace, giving brand owners an exciting opportunity to capture share of the market with differentiated RTDs that offer barista-quality roast and ground flavour," adds Mattock. "Consumers are seeking out cold brew as a natural alternative to energy drinks. Natural energy drink brands have benefited from triple-digit growth in recent years as consumers gravitate to low sugar energy drink alternatives such as cold brew<sup>26</sup>."

## Tapping into health

The health and wellbeing trend is fuelling growth and driving innovation across the category, says Arla's

Hacking. From protein to no added sugar, the RTD coffee category is moving with the zeitgeist, delivering innovations that provide the same great taste but with healthier options.

As one example of this, he points to last year's launch of Starbucks Protein Drink with Coffee, its debut protein drink, inspired by the health trend and desire for product functionality. "Over the last two years, the protein market has experienced exponential growth, increasing in value from £46m in 2021 to £147m in 2024<sup>27</sup>," he says. "At the same time, the RTD chilled coffee category has reached a significant scale. By appealing to existing protein drinkers as a trade-up opportunity and by tapping into the penetration opportunity for new shoppers, our innovation strengthens the protein sub-category."

TrueStart Coffee – "the original healthy coffee for 10 years" has gained over 853 distribution points in the last

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year, showing a huge interest from customers and shoppers who want a healthy coffee, says Owen. “We have regulated caffeine content across our core Instant Range and we are going to upgrade our packaging to make it clearer about the uniqueness of our health benefits. We will continue to make content to educate around the variation of caffeine content in your coffee.”

Coffee used to be regarded largely as a simple morning beverage, but now consumers increasingly see it as a lifestyle product that can be tailored to their preferences and enjoyed in a variety of contexts throughout the day, says JDE’s Kabalyk. “While 61% of UK consumers still say they drink coffee to wake them up and make them more alert, 38% now turn to coffee as a treat and 44% say they use it to relax<sup>28</sup>. Younger coffee drinkers in particular want choice, variety and the ability to personalise their drinks to their exact tastes and preferences, including any health and wellness goals.

“With the choice between caffeine and decaf products one of the main considerations for the health-conscious shopper, decaf is arguably the original ‘better for you’ coffee option and sales over the past year have been buoyed by consumer interest in wellness,” she adds. “Total decaf value sales have remained in growth and now make up a quarter of all instant coffee sales.”

However, Lincoln & York’s Bryson says the company’s research reveals health is not a major concern for coffee consumers. “In fact, around half do not associate coffee with their health at all<sup>29</sup>, he says. “Unlike other categories with negative health perceptions, coffee is gaining positive attention for its potential health benefits, with some research suggesting it can boost gut health and reduce the risks of chronic illnesses.

“For those concerned about the impact of caffeine on their health, there have been major developments in the extraction of caffeine, creating higher-quality decaf options which avoid the bitter taste generally associated with decaf coffee.

“Roasting coffee depends heavily on expertise rather than processing, which is good news for the growing concern around ultra-processed foods. As a versatile drink with very few health



### £884m

The value the UK tea market is expected to reach by 2028, rising 1.1% between 2023 and 2028

### 86%

of tea product launches in the UK tea market featured ethical & environmental claims in 2023

### One-fifth

of consumers choose to buy tea that provides additional health benefits

Source: <https://www.mintel.com/insights/food-and-drink/exploring-tea-consumption-global-tea-market-trends/>

concerns for consumers, they can customise their drink to suit their own taste, health and flavour preferences.”

When it comes to tea, sustainability and wellness remain key pillars of interest in infusions, which was key in creating Clipper Teas’ new organic Infusions range, says senior brand manager Hannah Southwick. “With four new products, Clipper is targeting specific need states with signposting such as ‘soothing’, ‘uplifting’, and ‘unwinding’ to help consumers switch off in nature. Each blend (Peppermint & Spearmint, Chamomile & Peach, Blackcurrant & Blueberry, and Orange & Turmeric) is designed to make the most of refreshing moments.”

#### In-store views

However, with all the activity going on in the hot beverages arena, are retailers really making the most of consumer interest in the category – and should they be doing more?



# Sustainable action: beyond packaging

JDE Peet's Kabalyk says 76% of consumers are calling for companies to take the initiative in reducing their environmental impact<sup>iii</sup>, with responsible sourcing and recyclable packaging being the two most important factors<sup>iv</sup>. Throughout this year, JDE will be communicating that its Kenco freeze-dried coffee is responsibly sourced on-pack as part of its broader journey towards 100% responsibly sourced coffee, tea and palm oil by 2025.

Lincoln & York is committed to making a positive contribution in the farming communities it sources from,

which extends to its partnership with Omwani Coffee and Migoti Coffee, where it is funding the construction of a reservoir in Burundi, says Bryson. Due for completion this year, it will be located near a washing station and will provide families with clean water in the coffee farming community of Kinama.

Finlay launched its Sustainable Future 2030 strategy in 2023, focused on "taking action today for the beverages of tomorrow", reveals Mattock. Through this, it is "committed to ambitious and measurable targets across climate net

zero, sustainable supply and our people", she says, adding that work to deliver against these targets continues.

At Costa Coffee, RTD products in GB use 100% Rainforest Alliance certified coffee. Meanwhile, at TrueStart Coffee, people and planet are part of the company's objectives and reporting structure, says Owen.

When it comes to tea, "more people are buying Fairtrade tea compared to two years ago", which is indicative of the rise in ethical and sustainable shopping", says Clipper Teas' Southwick. "Equally, consumers are

becoming more emotionally connected to how their products are being made. This is also evident in the growth of the organic food and beverages, which is now exceeding non-organic<sup>vi</sup>."

At Ahmad Tea, the ethical focus is on creating a stronger and fairer tea community, working collaboratively with local partners to provide food, healthcare, education and more to vulnerable communities around the world. It works with tea gardens to help them raise the standards of living and income for tea workers.

"The essential principles of clear branding, good merchandising and eye-catching displays go without saying and with demand for both hot and cold coffee on the rise, retailers need to make sure they're maintaining these basics," says Lincoln & York's Bryson. "Given the growth in popularity of quality coffee and the emergence of new brands and products on-shelf, brands and retailers should focus on clearer on-pack navigation, highlighting the key factors such as format (beans or ground), roast strength and taste profile. This will help consumers better navigate busy coffee fixtures.

"In line with coffee's growing popularity, in particular growth in premium offerings, there is a major opportunity within retail to position coffee as a simple but effective year-round gifting option," he suggests, "Against the backdrop of price inflation in the out-of-home market, more people are opting to treat themselves

to elevated coffee at home. Coffee can therefore be easily elevated into a gift at any time of the year, using innovative packaging such as tins for a stand-out high-end feel.

"There is also an opportunity to establish new occasions for cold coffee away from the core coffee fixture. New and emerging product formats such as coffee extracts and cold brew concentrate could benefit from being merchandised alongside other 'dilutable' soft drinks to help consumers understand the format and the occasion and to establish the products in retail."

As one of the fastest-growing beverage segments, it's critical to ensure consumers are able to easily locate RTD coffee within their everyday purchasing behaviours, such as breakfast and lunch on-the-go consumption, says CCEP's Kerr. "Being available with appealing pack formats at front-of-store locations within

meal deals is critical to this success, reinforced by the recent success of our Costa Coffee 330ml resealable rPET pack format, available in selected retailer meal deals," she says.

In retail outlets there is a growing space in both the food-to-go fridges and main category aisles for RTD coffee, says Finlay's Mattock. "The increase in space is testament to the success and growing popularity of cold coffee as a drink. For cold brew coffee there is still a job to be done by brand owners and retailers to explain the difference to consumers between an iced coffee and a cold brew coffee. Seeing cold brew coffee expand in both food-to-go and main category locations is great news, and there is now an opportunity for retailers to create a sub-category of cold brew to help differentiate it."

TrueStart's Owen points to colourful branding as a way to stand out in the coffee and tea aisle. "We did it intentionally to draw the eye, as

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branding in the hot coffee fixture hasn't really evolved for decades, with the same colour palettes etc. Sixty-seven per cent of our shoppers are new to the category<sup>30</sup> – showing the strength of our branding and messaging.”

According to Arla's Hacking, tangible steps have been made to move Starbucks chilled coffee beyond the dairy drinks fixture and expand it into multiple in-store locations. He attributes this to helping triple the value of the brand over the last five years. Meanwhile, chilled coffee is the largest value segment of dairy drinks and should therefore occupy a prominent position on-shelf with dedicated space offered to recognisable brands, he says. Plus, RTD coffee is an ideal addition to meal and link deals, he notes, with many retailers already taking advantage of including these drinks in their existing offers.

With all of this in mind, what are the key messages that suppliers want to convey to retailers about the hot beverages market?

Starting with tea, Clipper Teas' Southwick says it's the job of the industry to ensure “farmers are paid fairly for producing our tea, especially given the meticulous process, care and attention behind every gram”. “For consumers, the best way they can help is by choosing organic and Fairtrade,”

she adds.

“Consumers are increasingly demanding better-quality coffee and, as out-of-home coffee quality improves, the bar is also raised for retail and at-home options, sums up Lincoln & York's Bryson. “As more and more out-of-home trends emerge in retail, retailers need to stay up-to-date with what consumers are looking for and work with a coffee partner agile enough to adapt to these ever-changing demands.”

“We anticipate the [coffee] category will continue to expand for some time yet,” says Arla's Hacking. “Younger consumers, particularly those engaged with coffee house experiences, are increasingly choosing cold over hot formats. The opportunity exists to enhance this coffee house trend through fulfilling at-home and on-the-go missions across different types of retail and foodservice environments.”

Meanwhile, with the RTD iced coffee category growing rapidly, retailers can maximise their sales by offering a value brand such as Boost Iced Coffee to complement higher price point brands and ensure they are offering shopper choice, suggests AG Barr's Hipkiss.

“2025 promises to deliver another strong and exciting year for RTD coffee,” says Finlay's Mattock. “Considering a cold brew coffee provides another opportunity to

expand the category and create stand out premium products to delight consumers.”

RTD coffee is one of the most exciting and dynamic growth categories in fmcg right now, concludes CCEP's Kerr. “It's critical to support this growth by increasing space and visibility in high footfall locations, such as front-of-store grab-and-go chillers, and signposting the category using well-known coffee shop brands, like Costa Coffee.”

## Sources

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- <sup>4,5</sup> NielsenIQ, ScanTrack, Total Coverage, MAT w/e 28.12.24
- <sup>6</sup> NielsenIQ, Consumer Panel in Total GB, MAT w/e 30.11.24
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- <sup>8</sup> Allegra Project Café, UK 2024
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- <sup>23</sup> JDE Cost of Living Tracker, Human8 Inflation Module, Q3 2024
- <sup>24</sup> See 4+5
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- <sup>27</sup> Nielsen, 20.04.24
- <sup>28</sup> The Grocer, Category Report, Coffee is king of the cuppa: 10 charts that explain UK attitudes to coffee, August 2024
- <sup>29</sup> Lincoln & York, Coffee Culture Report 2024
- <sup>30</sup> Circana data, 2023

## On-trend flavours

<sup>i</sup> NIQ, MAT to 08.09.24

<sup>ii</sup> See 9

## Sustainable action

<sup>iii</sup> NielsenIQ, 'The changing climate of sustainability', 2022

<sup>iv</sup> JDE Mental Availability Tracking Q3, 2023

<sup>v</sup> Kantar, 'Who Cares Does' Study 2023

<sup>vi</sup> Soil Association, NIQ, October 2024



# Disrupting the instant coffee arena

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Head of Sales

**KEY BRANDS**

**TrueStart Coffee**  
– Barista Grade 100g  
– Barista Grade Decaf 100g  
– Super Blend 100g  
– Lightly Caffeinated 100g  
*\* all instant coffees*

For those seeking innovative products and a strong partner in the coffee category, TrueStart Coffee is a name that promises continued excellence.

TrueStart Coffee has undergone remarkable growth, solidifying its position as a true disruptor in the instant coffee category. Over the past year, the brand achieved an impressive 63% value growth, making it the second-largest growing brand in its category<sup>1</sup>. This success is bolstered by securing over 853 additional distribution points in 2024. With an average weighted price per kilo exceeding £40, TrueStart Coffee is not only offering premium quality but also delivering incremental value growth for retailers in an otherwise static category.

What sets TrueStart Coffee apart is its unique approach to meeting shopper needs, says head of sales Glesni Owen. “By offering a full spectrum of caffeine choices, the brand empowers consumers to control their energy levels, catering to individual lifestyles and preferences.”

The company plans to sustain its momentum with increased investment



“What sets us apart is our unique approach to meeting shopper needs”

in marketing and team development throughout 2025, ensuring retailers and consumers continue to see TrueStart as a standout player in the market.

Across the year, TrueStart plans to double its revenue and distribution points, establishing itself as a key category growth driver and, with exciting NPD on the horizon, it is poised to capture even greater attention.

# WAKE UP & DIVE INTO<sup>!</sup>



**REAL COFFEE  
IN AN INSTANT**



**100%  
BARISTA GRADE**

**63% YoY  
VALUE GROWTH**





# Bringing flavour and value

**DETAILS**

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Westfield  
Cumbernauld G68 9HD

**KEY CONTACTS**

**Euan Sutherland**  
Chief Executive Officer  
**Dino Labbatte**  
Chief Commercial Officer  
**Paul Barker**  
Sales Director  
**Lucy Henderson**  
Marketing Director  
**Adrian Hipkiss**  
Head of Functional Brands

**KEY BRANDS**

**Boost**  
**IRN-BRU**  
**Rubicon,**  
**Barr Flavours**  
**KA**  
**Bundaberg**  
**Snapple**

Now worth over £227m in the UK, the ready-to-drink (RTD) iced coffee category is growing rapidly at 101% value since 2020<sup>1</sup>. Boost’s iced coffee offering boasts an attractive retail price point, positioning it as a compelling choice for retailers to stock and complementing higher price point brands. Aligning to its core principles of great taste and value at a fraction of the price, Boost is a guaranteed way of delivering exceptional value for money to its customers, says Adrian Hipkiss, head of functional brands at AG Barr.

“To capitalise on the burgeoning growth of the category, retailers need to allocate enough space for RTD iced coffees and stock the 250ml can format, which is by far the largest-selling format with a 52% market share<sup>2</sup>, he reveals. “Value brands are driving RTD iced coffee and stocking lucrative brands like Boost, which is the fourth-largest iced coffee brand with a 10% share of the market<sup>3</sup> is vital for retailers.

“Flavoured iced coffee SKUs are proving to be the highest velocity factor in consumer spending, adds Hipkiss. “Caramel (+24%) which features in Boost’s offering, is the top flavour in the space and accounts for 21% of the category’s sales value<sup>4</sup>. Boost has a 10% share of the iced coffee market and is growing +69% in the last three years<sup>5</sup>.”

Iced beverages continue to be popular among consumers as an afternoon pick-me-up or a convenient beverage that travels well on-the-go. Growing demand means one in three hot coffee drinkers now prefer an iced coffee on a warm day, with RTDs delivering a great, affordable treat that UK shoppers are increasingly looking



“**Flavoured iced coffee SKUs are proving to be the highest velocity factor in consumer spending. Caramel is the top flavour in the space and accounts for 21% of the category’s sales value**”

for, notes Hipkiss. “This provides retailers with a great opportunity to draw customers in, especially over the summer months, and in turn maximise sales. To successfully capitalise on the growing popularity of RTD iced coffee, retailers should look to stock value brands like Boost.”

Brewed with robusta and arabica beans from Brazil and Vietnam and made with real milk, Boost Iced Coffee is big on flavour without being big on price, he notes. Available in 250ml cans in both plain and £1.19 PMP, Boost Iced Coffee comes in four tasty flavours:

- Caffè Latte – a delicious, silky smooth Latte with subtle coffee notes and a creamy tasting texture.
- Double Espresso – a full-bodied coffee with milk that can be enjoyed wherever and however. Compared with the Latte, it has a stronger coffee taste with a balanced sweetness.
- Caramel Latte – deliciously smooth and mellow, and the perfect iced pick-me-up, ideal for those who want some extra sweetness with a luxurious creamy texture.
- Mocha – rich and chocolatey for those who want that combination of coffee and chocolate.

“With a fresh new look, each of Boost’s caffeine-kicking flavours make the coolest sweet treat for your shoppers,” concludes Hipkiss. “Boost will continue its heavyweight support with a £2m brand investment in 2025.”



**Source**

<sup>1</sup> Circana GB Symbols & Indies and NI Convenience Units Sales, 52 w/e 28.09.24  
<sup>2</sup> Circana, S&I GB & Convenience NI, Value, 52 w/e 28.09.24  
<sup>3</sup> See 1  
<sup>4</sup> Circana Total Market, Supermarkets, Convenience Mults, GB Symbols & Indies and NI Convenience, Petrol & Travel Value, 52 w/e 23.03.24  
<sup>5</sup> See 1 + 3



**BOOST**

# ICED COFFEE, **HOT** PROFITS

MADE WITH  
**REAL  
MILK!**

£1.19

**BOOST**

ICED  
COFFEE



Deliciously Mellow

**CARAMEL  
LATTE**

**#4 ICED  
COFFEE BRAND\***

**+69% GROWTH IN  
THE LAST 3 YEARS\***

**OVER HALF OF ICED  
COFFEE SALES COME  
FROM 250ML FORMATS\***





# A fairer and stronger future for tea

## DETAILS

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## KEY CONTACTS

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Head of Sustainability,  
Ahmad Tea  
e: Zahra.Afshar@ahmadtea.com to support our profit share programme

**Gary Winslade**  
UK country manager  
e: sales@ahmadtea.com for listing information

**How to help**  
To support Ahmad Tea's profit-share programme and its other initiatives to rebalance the tea industry contact the UK sales team or Zahra directly

## KEY BRANDS

Ahmad Tea  
Galerie du Thé

➔ Ahmad Tea is on a mission to uplift tea workers through its direct payments project and other initiatives. The UK tea brand is extending its profit share scheme to help more tea workers, reveals Zahra Afshar, head of sustainability, and she is urging people to join its campaign.

“We work collaboratively with local partners in our 90 markets around the world to support long-term solutions to meet real needs,” says Afshar. “We provide food, healthcare, education and access to drinking water – both in tea gardens and beyond, to vulnerable communities around the world. This work has been recognised by His Majesty King Charles III, who awarded us the King’s Award for Enterprise in Sustainable Development, 2024.”

### Fairer and stronger tea communities

Ahmad Tea only works with high-quality tea gardens, which support everyone within the supply chain. “Every year, we work with tea gardens to help them raise the standards of living and income for tea workers,” explains Afshar. “We are committed to making a difference that lasts.”

### Direct action via direct payments

Ahmad Tea has worked with tea gardens in their biggest sourcing



“Our vision is a more balanced tea chain, where tea growers and tea workers enjoy a greater share in the value of tea”

regions – India, Kenya, Malawi and Sri Lanka – to identify the workers who are plucking the tea leaves and send them a profit share bonus. “The pilot scheme has already started to shrink the living wage gap and is the most direct and meaningful way we have found to support tea workers,” says Afshar. “By ensuring these bonuses are paid digitally, we are encouraging women to have greater access to financial services and independence over their income.”

### What’s next?

This year, Ahmad Tea is extending the scheme to pay more bonuses to more women.

“We are investing in taking the consumer along on this journey to discover how every cup of Ahmad Tea can make an impact. Our vision is a more balanced tea chain, where tea growers and tea workers enjoy a greater share in the value of tea.”







# INSPIRING THE LOVE OF TEA

Enjoy the finest teas, crafted with care. Ahmad Tea blends premium quality with sustainability, proudly awarded the King's Award for Enterprise in Sustainable Development.



For all UK trade enquiries  
contact Petty Wood,  
Ahmad Tea's Official UK distributor:  
[info@pettywood.co.uk](mailto:info@pettywood.co.uk)  
+44 (0) 1264 34 55 00

[ahmadtea.com](http://ahmadtea.com)



# Driving sales for customers

## DETAILS

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## KEY CONTACTS

**Helen Kerr**  
Associate Director –  
Commercial Development  
at Coca Cola Europacific  
Partners (CCEP)

## KEY BRANDS

**Costa Coffee RTD**

↙ The ready-to-drink (RTD) chilled coffee category continues to go from strength to strength, worth more than £323m and growing in value and volume in GB<sup>1</sup>. It is a highly incremental category<sup>2</sup> and, at the end of 2024, more than a quarter of UK households were purchasing RTD coffee<sup>3</sup>.

“Costa Coffee’s RTD range taps into the popularity of Costa Coffee as the nation’s favourite coffee shop for the past 14 years<sup>4</sup>, with a unique ‘coffee-first’ proposition centred around Costa Coffee’s Mocha Italia Signature Blend, reveals Helen Kerr, associate director – commercial development at CCEP.

“The line-up contains a variety of options to meet different consumer needs,” she says. “For example, our Frappe range for more indulgent options, our Latte range for that everyday pick-me-up and also our Double Shot for when you are looking for that no compromise boost.

### In-store merchandising

RTD chilled coffee has predominantly been led by on-the-go sales; its easy and convenient format lends itself well to consumers seeking refreshing coffee options on-the-go.

“While the Costa Coffee RTD range is largely displayed within chillers at the front or back of store, the range can be supplied and displayed ambiently,” says Kerr. “This is an opportunity for retailers to dual-site and use different areas in-store for multi-serve formats that shoppers then take home and chill in their own fridges before serving. Alternative display areas could include free-standing display units to disrupt shoppers, or potentially including within the soft drinks aisle.

“As the category continues to grow in popularity, consumers are also enjoying their favourite RTD chilled coffee when they’re at home, particularly as hybrid working is now an established part of many people’s routines. Take-home packs of RTD chilled coffee continue to grow in retail<sup>5</sup>.

“That’s why we’ve made our popular core range available in larger multi-serve formats to sell chilled from the dairy aisle. Our range includes ‘The



“Costa Coffee’s RTD range taps into the popularity of Costa as the nation’s favourite coffee shop for the past 14 years<sup>4</sup>, with a unique ‘coffee first’ proposition centred around Costa Coffee’s Mocha Italia Signature Blend”

Big Latte’ and ‘The Big Caramel Latte’ 750ml rPET bottles, as well as 4-can multipacks of our Caramel Latte variant.”

### Flavours and innovation

Costa Coffee’s RTD chilled coffee range benefits from insight from the Costa Coffee shop business, so it can deliver the innovations that it knows consumers will love, notes Kerr.

“In August, we rolled out our Latte and Caramel Latte in 330ml bottle formats to drive further on-the-go chilled coffee sales and tap into the ‘with food’ occasion.

“The 250ml cans of Costa Coffee RTD Latte and Caramel Latte were already in growth in grocery<sup>6</sup>, however, research showed that 330ml is the most popular pack size among consumers<sup>7</sup>. With that in mind, the new packs are an ideal accompaniment to a lunchtime meal deal, and with the addition of a cap the format is perfect drink to enjoy on the move.

“The 330ml bottle is made from 100% rPET (excluding caps and labels) and is 100% recyclable.

“We also announced the addition of two price-marked packs (PMPs) last year, to help convenience retailers drive incremental sales within the RTD chilled coffee segment.

“2025 will be a fast start with exciting campaigns and activations to help drive sales for our customers.”

## Source

<sup>1</sup> Nielsen, Total Coverage, Val and Vol MAT w/e 28.12.24

<sup>2</sup> Kantar WPO, 52 w/e 07.07.24

<sup>3</sup> Kantar Combined Panel, 52 w/e 29.12.24

<sup>4</sup> The open text question ‘What is your favourite branded coffee shop chain’ was asked to Allegra’s independent panel of 5,050 UK coffee shop consumers to which 51.6% cited Costa Coffee.

The survey was conducted as part of Allegra’s annual study on the UK branded coffee shop market – Project Café UK 2024. <https://www.worldcoffeeportal.com/Research/LatestReports/ProjectCafeUK24>

<sup>5</sup> Nielsen, Total Coverage, Val and Vol, MAT w/e 15.06.24

<sup>6</sup> Nielsen, Grocery Multis, Vol MAT w/e 15.06.24

<sup>7</sup> Brand potential RTD shopper research April 2023: Consumers’ optimum large on-the-go pack. 1,409 survey participants



330ml  
bottle

Be  
ready  
to elevate  
your  
sales



- Now available in 100% rPET
- Perfect for Meal Deal
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- For more information visit [my.ccep.com](https://my.ccep.com)

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[MY.CCEP.COM](https://my.ccep.com)



**COSTA**  
COFFEE



# GOOD tea is natural and fair

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Marketing Director  
**Hannah Southwick**  
Clipper Teas Senior  
Brand Manager

KEY BRANDS

**Clipper Teas**  
**Kallø**  
**Mrs Crimble's**

‘There’s Tea, Then there’s GOOD Tea’: that’s the strapline of Clipper’s marketing campaign, which celebrates what makes tea really special.

The campaign was rolled out globally for the first time in 2024 across Italy, Spain, France, the Netherlands, the US and Japan. Clipper is a brand that stands for tea that is not just delicious, but natural and fair too, says Hannah Southwick, Clipper Teas senior brand manager at Ecotone UK. “The UK has been a leader in bringing this message to the masses with its first national TV campaign,” she reveals. “The fully integrated UK activity was so successful, that it is being repeated in 2025 with a £1.5m total investment.

“Every year we ask ourselves, how can we keep Clipper at the forefront of sustainable tea and make our mark on the hearts and minds of consumers?” she adds. “What it comes down to, is what truly makes a good tea. Shoppers want a delicious tea, but a groundswell of people are looking for provenance, traceability and water-tight sustainability credentials. And Clipper has those in abundance, attributing them to its YOY growth of 13.7% value and 8.5% volume sales in 2024<sup>1</sup>.

**Reconnecting with nature**

A global trend towards embracing nature is booming as people increasingly seek ways to unwind from daily stresses, notes Southwick. “Clipper is on a quest to help, with its current on-pack promotion,” she says. Running until mid-March, tea drinkers can get closer to nature with prizes ranging from an eco-friendly family holiday to Clipper wellies and tea flasks.

Savvy shoppers are now educating themselves on the best products for their health, and the health of the planet. Known as ‘Eco Actives’, these shoppers are the most engaged in ethical and environmental issues, and now make up one in three households<sup>2</sup>.

**Making a difference to farmers**

“As Fairtrade’s first and longest-standing tea partner, Clipper stands for doing the right thing both for consumers and the people who grow



“Shoppers want a delicious tea, but a groundswell of people are looking for provenance, traceability and water-tight sustainability credentials. And Clipper has those in abundance”

our tea. It’s paramount to drive value back into the category to support farmers on the edge of the climate crisis,” adds Southwick.

To bring this message to a global stage, Clipper became the official tea partner of Glastonbury Festival in 2024, bringing sustainable tea to an audience aligned to eco-conscious values. “We’re returning to Glastonbury this year, as it’s so aligned to our GOOD tea message.”

Clipper is also an innovation powerhouse, bringing the world’s first fully biodegradable, plant-based and unbleached teabag to market, she says. “The brand continually invests in a natural infusions range to meet growing demand for functional blends. Four new organic products were added last year: Peppermint & Spearmint, Orange & Turmeric, Chamomile & Peach and Blackberry & Blueberry. With every cup, Clipper proves that GOOD tea can do good – for people, farmers, and biodiversity,” she concludes.

Source  
<sup>1</sup> Circana 52 w/e 28.12.24  
<sup>2</sup> Kantar, Who Cares Does Study 2023



BIGGEST TV  
CAMPAIGN  
LIVE NOW

OVER  
£1M  
INVESTED  
IN Q1

# CLIPPER®

THERE'S TEA. THEN THERE'S  
**GOOD TEA.**



Fastest growing Organic and  
Fairtrade Tea Brand\*



\*Fastest growing tea brand in 2024 +13.7% Value Sales. Source: Circana 52 w/e 28th Dec 2024





# Growing RTD coffee with cold brew

## DETAILS

**Finlay Extracts & Ingredients UK Limited**  
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## KEY CONTACTS

**Katy Smeathers**  
Head of Sales  
**Tracey Mattock**  
Marketing Manager

## KEY PRODUCTS

**SIG Dome cartons**  
**Aluminium cans**  
**PET and glass bottles**  
**Sachets and stick packs**  
**Bag-in-box**  
**Pouches**  
**Ingredient formats (bulk packaging)**

Finlay Extracts & Ingredients has started 2025 with exciting plans for its new state-of-the-art cold brew facility, located in the UK and producing premium cold brew coffee for private-label customers and brand owners across Europe.

Finlays has been growing the global cold brew market for more than 35 years and already boasts two cold brew extraction facilities in the US. Research has shown Europe to be an emerging market for cold brew, with the UK and Germany expected to lead the maturation<sup>1</sup>. The company has identified an opportunity to leverage its expertise and establish a premium-quality cold brew operation in the region and has made a multi-million-pound investment into a facility located in Hull. During 2024, production at the site commenced, with its coffees generating high customer interest and praise from across Europe.

“Cold brew coffee has an exciting future as the premium segment of the ready-to-drink (RTD) coffee category,” notes Tracey Mattock, marketing manager at Finlays. “The rise of the RTD iced coffee market has been fuelled by consumer demand for convenience, innovation and affordable luxury. Despite the cost-of-living crisis, beverages remain an accessible treat, with cold brew coffee helping to drive innovation and premiumisation into the RTD iced coffee category.”



“Cold brew coffee has an exciting future as the premium segment of the RTD coffee category. One of the opportunities is to educate consumers that cold brew isn't an iced coffee, as this does cause some confusion”

The premium nature of Finlays' cold brew coffee is derived from its slow and gentle extraction from coffee beans, using ambient or cool water, instead of rapidly in hot water. This helps to bring out the finest flavours from the bean, resulting in less acidity, richness, a natural sweetness and a smooth taste.

“One of the opportunities is to educate consumers that cold brew isn't an iced coffee, as this does cause some confusion,” notes Mattock. “An iced coffee can be made with cold brew but, typically, iced coffees are made using hot brewed coffee that is chilled down. The taste profile between the two brewing methods is very different. An iced coffee may taste more acidic and bitter. Working with brand owners and retailers to showcase the differences between cold brew and iced coffees is a priority for the Finlays team.”

Over the past 12 months, Finlays has worked to establish a strong cold brew coffee portfolio – from bulk concentrate to RTD solutions – in a variety of packaging formats and flavours, as well as bespoke creations. Finlays is now partnering with European retailers and brand owners to meet rising demand for cold brew. “In 2025, we will evolve our offer further and look at opportunities to add more solutions and flavours that delight consumers. One of our most exciting developments will be offering RTD cold brew in SIG Dome cartons, which we expect to be very popular with customers,” concludes Mattock.



## Source

<sup>1</sup> Euromonitor 2024: Germany at US\$501m in 2023 has a predicted 6% CAGR to 2028, while the UK, at \$304m, has a predicted 15% CAGR between 2024 and 2028





**Finlays**<sup>™</sup>  
— Since 1750 —

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brew coffee and RTD solutions to  
UK and European customers.

FIND OUT MORE AT  
[finlays.net](https://finlays.net)



# Out-of-home quality, right at home

## DETAILS

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## KEY CONTACTS

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Managing Director  
**David Loan**  
Head of Sales  
**Chris Tough**  
Coffee Buyer

## KEY BRANDS

Lincoln & York

Lincoln & York is one of the UK's largest private-label coffee roasters, roasting nearly 9,000 tons of coffee annually from its BRC AA+ accredited roastery – the equivalent of around 80 million cups a year!

Now in its 4th decade, Lincoln & York has been the driving force behind high street coffee brands and independent coffee shops alike, says Ian Bryson, managing director at the company. “In recent years we have brought our scale and knowledge to retail,” he says. “As the demand for better-quality coffee at home continues to grow, we are helping retailers bring the quality and innovation that consumers have come to expect from their coffee out of home to the retail fixtures across the country.”

In 2023, coffee overtook tea as the nation's favourite hot drink for the first time<sup>1</sup>, reflecting a growing demand for premium, espresso-based drinks and flavoured options, which are no longer exclusive to the coffee shop, reveals Bryson. “Consumers increasingly look to recreate this experience at home, reflected in the booming coffee machine market, which is now worth £163m and forecast to grow a further 20% in the next five years<sup>2</sup>,” he says.

“Despite this opportunity, the category is often falling short in addressing what the UK's coffee drinkers really want. At Lincoln & York, we're bridging this gap between retail and out-of-home, delivering the same high-quality, expertly crafted blends for our retail customers that we've been offering for the last three decades to the out-of-home market. From exploring new coffee innovations, such as flavoured ground coffee to tapping into the growing demand for speciality coffee from consumers, we're working closely with our retail partners to ensure they stay ahead of the curve and drive growth in the category.



“At Lincoln & York, we're bridging the gap between retail and out-of-home, delivering the same high-quality, expertly crafted blends for our retail customers that we've been offering for the last three decades to the out-of-home market”

“We've supported this with significant investment across our business,” he adds. “Over the past four years, we've invested more than £4m to ensure our facilities, technology and people are equipped to meet the growing demand for high-quality, responsibly sourced coffee in retail. This includes our 600kg roaster – the largest in the UK – and the upcoming installation of a brand-new high-speed 1kg packing line, which will expand our production capabilities even further.”

Out of only 135 certified Q Graders in the UK, Lincoln & York has three of these experts in-house to provide guidance through cupping and tasting sessions. “We're also nurturing the next generation of talent, with our coffee apprentice Mollie Harvey, winner of the Food Manufacture Excellence Awards Future Talent award, working towards becoming our fourth Q Grader,” he says.

“As for 2025, our ambition is clear: to bring our decades of out-of-home knowledge and consistent quality into the retail market, meeting the growing consumer demand for premium coffee at every occasion.”

## Source

- 1 Statista Global Consumer Service – August 2023
- 2 Allegra, Coffee at Home 2023
- 3 NIQ data, 52 w/e 02.11.24



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YOUR COFFEE PARTNER



## YOUR BLEND IS OUR BUSINESS



The **family owned coffee roaster** behind hundreds of expertly developed blends



Roasting **9,000 tonnes** of coffee every year - enough for **80 million cups**



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[info@lincolnandyork.com](mailto:info@lincolnandyork.com) | +44 (0)1652 680101

[www.lincolnandyork.com](http://www.lincolnandyork.com)

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# Nescafé launches new KitKat Latte

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UK & Ireland

**KEY BRANDS**

**Nescafé**  
**Nescafé KitKat Latte**  
**Nescafé Aero**  
**Peppermint Mocha**  
**Nescafé Quality Street**  
**Green Triangle Mocha**

➔ Nescafé has collaborated with the ultimate break brand, KitKat, to create a delicious chocolate-flavoured latte to brighten up your next coffee break.

The Nescafé KitKat Latte launched in December 2024 and combines the best of both worlds, bringing together the rich flavours of Nescafé coffee with the signature chocolatey-wafer taste of KitKat.

**Iconic collaborations**

The new and indulgent Nescafé KitKat Latte joins a full line-up of other Nestlé confectionery collaborations, including Aero Peppermint and Quality Street Green Triangle. The line-up is proving to be popular with consumers as both the Nescafé Peppermint Aero Mocha and Nescafé Quality Street Mocha were the top two best-selling new products across in-home coffee in 2024<sup>1</sup>.

Each crafted with fresh milk, the frothy lattes and mochas deliver a sweet taste, balanced aroma and creamy texture, with a serving coming in at under 100 calories when prepared according to instruction.



“We’re thrilled to continue our collaborations with iconic Nestlé confectionery brands. The chocolatey-wafer flavour of KitKat perfectly complements the aromas of Nescafé coffee”

Ingrid Hayes, marketing director for Nescafé at Nestlé UK & Ireland says: “We are thrilled to continue our collaborations with iconic Nestlé confectionery brands. The chocolatey-wafer flavour of KitKat perfectly complements the aromas of Nescafé coffee. We’re excited to be bringing more unique and indulgent experiences to coffee lovers in the UK.”

**Working with UK dairy farmers**

“We’re also proud of the fact that real milk goes into the Nescafé frothy coffee range, produced here in the UK at our Dalston site, with milk sourced from dairy farms across Ayrshire and Cumbria,” adds Hayes.

Through Nestlé’s partnership with First Milk, the business works with 85 farmers in a dairy operative across Cumbria and Ayrshire to provide high-quality fresh milk for brands made in the UK, such as KitKat and Nescafé Frothy Coffee. Through the partnership, Nestlé’s goal is to lessen environmental impact by improving the sustainability and efficiency of the supply chain. Each farmer receives a ‘sustainability bonus’ for taking practical measures that protect and enhance natural assets on their land<sup>2</sup>.

Nescafé KitKat Latte is available in stores nationwide. Each portion comes in an individual sachet, making it easy for shoppers to enjoy this delicious latte at home or on the go, any day of the week.



**Source**

<sup>1</sup> Circana All Outlets & Kantar Discounters, 52 w/e 28.12.24, Average 4w/e Value Sales at Sub-Brand Level.  
<sup>2</sup> Find out more here: Supporting Regenerative Dairy Farming, Nescafé, UK & IE



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# NESCAFÉ



# Keeping chilled coffee fresh

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**KEY CONTACTS**

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Marketing Director  
EMEA, Starbucks  
**Adam Hacking**  
Head of Beverages, Arla

**KEY BRANDS**

**Starbucks Chilled Classics®**

- Caffè Latte
- Oat Based Cappuccino
- Oat Based Caramel Macchiato
- Starbucks® Blissful Retreat Limited Edition Chilled Classic  
RRP £2.00

**Starbucks Frappuccino®**

- Mocha
- Caramel No Added Sugar
- Starbucks® Frappuccino Sip On Sunshine Limited Edition drink  
RRP £2.10

**Starbucks® Protein Drink with Coffee**

- Caffè Latte, Chocolate Mocha flavour and Caramel Hazelnut flavour  
RRP £2.75

Worth £316m, the ready to drink (RTD) chilled coffee sub-category has experienced an exceptional pace of growth and, at £157m, Starbucks chilled coffee is the leading player<sup>1</sup>. The brand has continued to grow, increasing by 8.8% value and 9.2% volume in the last 12 months<sup>2</sup>, and holds 50% value share of the chilled coffee sector, making it larger than the next five brands and own-label combined<sup>3</sup>.

Innovation has been a fundamental driver of this brand performance. Last year key roll-outs included Starbucks Protein Drink with Coffee and Starbucks Frappuccino Caramel No Added Sugar and both have recently been named Product of the Year 2025. This year is set to be no different and, by continuing this spirit of innovation, is bringing NPD excitement and intrigue to the category. In the first month of the year, the No.1 RTD brand has already launched two new limited-edition offers and refreshed the popular Starbucks Chilled Classics range with new beverages for those who prefer plant-based alternatives.

“Since the launch of Starbucks Chilled Coffee, we’ve been leading the way in creating drinks inspired by Starbucks Café favourites, for coffee drinkers to enjoy at home or on-the-go,” says Charlotta Oldham, marketing director EMEA at Starbucks. “Expanding the choices we offer to our consumers no matter their flavour preferences or lifestyles, is a testament to Starbucks’ pioneering efforts to continually innovate our product offering without ever compromising on taste.”

Hot on the heels of a limited time offer for the festive season, January saw the launch of new Starbucks Blissful Retreat Limited Edition Chilled Classic (MRRP £2.00) and Starbucks Frappuccino Sip On Sunshine Limited Edition drink (MRRP £2.10). Available for a limited time, the new additions join a growing selection of Starbucks chilled coffee beverages that are aimed at allowing consumers to feel uplifted, whether on-the-go or at home.

On top of this Starbucks Oat Based Cappuccino and Oat Based Caramel Macchiato also recently rolled out



“Since the launch of Starbucks Chilled Coffee, we’ve been leading the way in creating drinks inspired by Starbucks Café favourites for coffee drinkers to enjoy at home”



nationally (MRRP £2.00). These exciting additions to the Starbucks Chilled Classics range mean there are now more ways for coffee-lovers to enjoy their favourite Starbucks drinks than ever before, and with new plant-based recipes, deliver that same iconic Starbucks taste as the core dairy range.

All products are hitting shelves nationwide this month.

**Opportunity for growth**

Starbucks anticipates that the RTD chilled coffee category will continue to expand for some time yet. Tapping into trends to drive penetration and grow the market will be key, particularly for younger consumers and those engaged with coffee house experiences who are increasingly choosing cold over hot formats. The opportunity exists to enhance this coffee house trend through fulfilling at-home and on-the-go missions across different types of retail and foodservice environments. The hot beverages category is worth in excess of £2bn in retail<sup>4</sup>, so the cold coffee category has some headroom to go to unlock this.

Source  
<sup>1,3</sup> Nielsen w/e 30.11.24  
<sup>4</sup> IRI, 52 w/e 15.07.23



# THE UK'S NO.1 CHILLED COFFEE BURSTS INTO PROTEIN\*



\*Nielsen 30/11/2024  
Winner Protein Drink Category. Survey of 8,000 people by Kantar.





# INSTANT GINGER MIX SERIES



### Ingredients

- 1 sachet Instant Ginger Turmeric Drink
- 40ml Water
- 60ml Chilled milk
- Cinnamon powder (Optional)

### Ingredients

- 1 sachet Natural Ginger Bag
- 250ml boiling water
- Lemon slice (as desired)
- Mint leaves (as desired)
- Honey (optional)



Scan for recipe



# INSTANT LATTE SERIES

### Ingredients

- 1 sachet Matcha Latte
- 90ml Warm water
- 1 banana (frozen)
- 1 cup Ice
- 50ml Chilled milk
- Almond, pistachio nuts, mint leaves (Optional)



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