

United States Cafes & Bars - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The United States Cafes & Bars Market size is estimated at USD 83.01 billion in 2024, and is expected to reach USD 132.58 billion by 2029, growing at a CAGR of 9.82% during the forecast period (2024-2029).

Rapid expansion of coffee chains and the increased popularity of gourmet coffee is boosting the market

- The cafes & bars segment of the foodservice market is led by the sub-segment cafes owing to the increasing penetration of coffee shops across the country. The number of coffee shops in the United States increased by 7.84% from 2017 to 2022. The country's largest coffee operators, including Starbucks Corp, Dunkin', and Panera Bread, increased their presence in the US market with 15,650, 9,262, and 2,173 stores, respectively, as of 2022.

- With increasingly busy lifestyles and long working hours, US coffee chains have become more popular with customers who prefer coffee on the go. The United States has witnessed significant growth in the popularity of coffee-drinking culture among urban residents. Almost 50% of daily coffee drinkers in the country preferred coffee at a quick service restaurant, cafe, donut shop, or through a drive-through in 2022.

- Bars & pubs is the second-largest segment under this category, owing to the trend of socializing at bars among the younger population and millennials. In addition, consumers are willing to spend on exotic flavors and beverages and are opting for fancy cocktails and alcoholic drinks, along with a wide range of food styles. In 2022, nearly one in three Americans preferred a bar or club that has an activity, food, and drink in one place. Thus, major bars are expanding their services and capacities.

- Juice bars and specialist coffee & tea shops held a minimal share in the segment but are gaining prominence among Americans owing to the increased demand for gourmet coffee, primarily due to the growth of specialty coffee chains in the country. Around 2.1 million Americans drank gourmet coffee in 2020.

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United States Cafes & Bars Market Trends

Growing coffee culture in the United States fuels cafes & bars' growth, driven by chained outlets

- The number of cafes & bars in the United States increased by 7,000 from 2020 to 2022, owing to the increased coffee consumption in the country. The coffee-drinking culture among urban residents in the United States has been witnessing significant growth in popularity. Popular coffee chains in the country, such as Starbucks, Dunkin' Donuts, Panera Bread, and Peet's Coffee, are expanding their presence in the market. As of January 2023, Starbucks had the most number of locations (15,842) across 52 states and territories in the United States, while Dunkin' Donuts had 9,368 locations, and Panera Bread had 2,160 locations.
- The cafes & bars segment accounted for the third-largest share of the market in 2022, after QSRs and FSRs. The number of outlets is projected to record an average Y-o-Y growth rate of 0.15% during the forecast period, with the increasing popularity of specialty coffee and craft beer. In 2021, the United States had 72,148 cafes and 68,338 bars. The popular drinks served at cafes & bars are cappuccino, latte, Americano, hot chocolate, craft beer, wine, whiskey, orange juice, and cocktails.
- The COVID-19 pandemic significantly impacted the cafes & bars segment in the United States, as around 5,856 establishments were closed due to government regulations, thus leading to declined sales. However, many cafes & bars have shifted to take-out and delivery orders and have implemented contactless delivery, gradually boosting their sales.

Rising prices and increased demand boost revenues at cafes and bars

- The consumption and price of coffee steadily rose over the review period. Americans' preference for coffee has grown over the last decade. Since 2015, coffee consumption in the United States has increased by 5-10%. Around 60% of Americans drink coffee daily. American women spent an average of USD 2,325 per year on coffee, and American men spent around USD 1,920 per year. Also, cafes are expanding their menus or specialty drinks that are more expensive than traditional coffee or tea. The increasing popularity of third-wave coffee shops, which focus on premium coffee and artisanal brewing techniques, has contributed to the growth of specialty coffee.
- Thus, the average order value for cafes and bars increased by 16.33% from 2017 to 2022. The rising inflation rate increased by an average of 3-4% from 2017 to 2022, and the number of orders per year increased by 41.11% from 2020 to 2022. Popular coffee and drinks preferred by Americans include Cappuccino (USD 4.5 per cup), Latte (USD 5 per cup), Americano (USD 3.8 per cup), Hot Chocolate (4.75 per cup), Orange Juice (USD 6.5 per glass), Craft Beer (USD 11 per 16 oz), Wine (USD 10 per glass), Cocktails (USD 15 per glass of 1.5 oz), and Whiskey (USD 14 per peg).
- In the United States, alcohol sales increased by 22.4% in 2022 compared to 2020, of which more than 50% of sales were generated through bars, pubs, and nightclubs. Consumers in the country prefer local tastes and are willing to pay more for premium-crafted beers. Thus, the bars & pubs segment is likely to remain strong during the forecast period.

United States Cafes & Bars Industry Overview

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The United States Cafes & Bars Market is fragmented, with the top five companies occupying 34.11%. The major players in this market are Dutch Bros, Inc., Inspire Brands, Inc., Restaurant Brands International Inc., Starbucks Corporation and Tropical Smoothie Cafe, LLC (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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