foodservice IP

Study: Away-from-Home Beverage Futures 2026

Coffee, Tea, Energy & Functional Beverages

The food-away-from-home beverage marketplace continues to anchor profitability across all operator channels, but the stakes and expectations have shifted. Beyond simply “something to drink,” beverages now carry brand equity, health halos, customization expectations, and equipment/labor implications that make them a strategic battleground for manufacturers and operators alike.

As suppliers look ahead, questions are less about if beverages drive sales — and more about which categories, formats, and positioning will unlock incremental revenue and loyalty. Energy and functional beverages blur with coffee and tea occasions; plant-based creamers and milks are mainstream; and sustainability narratives are increasingly part of the operator-supplier equation.

FSIP’s 2026 study will provide sponsors with an updated, evidence-based roadmap for capturing beverage growth in today’s foodservice ecosystem — blending operator realities, consumer pull, and supplier differentiation.

Engagement Objectives

- Provide a comprehensive assessment of the foodservice market for hot, cold, and functional beverages — including size, segmentation, growth prospects, and new dynamics.
- Examine consumer drivers of beverage choice: health, energy, indulgence, sustainability, customization, and branding.
- Assess operator practices across segments (C&U, healthcare, retail/c-store, QSR, full service) and their approaches to labor, equipment, and supplier partnerships.
- Identify opportunities for suppliers in adjacent innovation spaces (plant-based, functional, energy-plus, indulgent) while also benchmarking coffee/tea programs.
- Translate findings into practical implications for roasters, creamers, dairy/alt-dairy, and functional beverage manufacturers.

Proposed Key Issues

The following issues will be addressed in the engagement and incorporated into the field research guides. These will be refined in consultation with sponsors to reflect their evolving needs.

Consumer/Guest Perspective

- Rationale for beverage choice by occasion: energy, indulgence, health, convenience.
- Trade-offs between traditional (coffee/tea/soda) and emerging (energy, functional, plant-based) categories.
- Perceptions of brand equity: Starbucks vs. "house coffee," Monster vs. private-label energy, etc.
- Willingness to pay premiums for sustainability, certifications, and functional claims.
- Impact of technology: mobile ordering, subscription models, self-serve innovations.
- Shifts in daypart behavior: coffee in afternoon/evening, energy/functional in morning.

Operator Perspective

- Profit contribution and margin dynamics of beverages by segment.
- Equipment and labor challenges: automation, bean-to-cup, draft beverage systems.
- Role of supplier partnerships in driving loyalty and incremental sales.
- Adoption of plant-based creamers/milks, specialty teas, and functional SKUs.
- Sustainability pressures: packaging waste, recyclable/reusable cups, water use.
- Expansion of grab-and-go, bottled, and canned beverages inside traditional foodservice venues.

Overall Market

- Forecast for hot, cold, and functional beverages over the next 3–5 years.
- Cross-category blurring: coffee with protein, tea with functional add-ins, energy with hydration.
- Success factors for roasters, creamers, and functional beverage brands in foodservice.
- Threats/opportunities from CPG–foodservice convergence (e.g., retail brands flowing into foodservice).
- Strategic implications for suppliers: positioning, innovation, partnerships, and equipment investment.

Proposed Scope of Coverage

The study will cover the following major product categories and subcategories in the foodservice beverage space. Scope can be adjusted based on sponsor interest and priority segments:

Coffee & Coffee-Based Beverages

- Roast & ground, soluble, pods, and ready-to-drink (RTD) formats
- Specialty coffee (espresso-based, flavored, cold brew, nitro)
- Creamers (dairy, plant-based, flavored, functional)
- Equipment considerations (brewers, grinders, dispensers)

Tea & Tea-Based Beverages

- Traditional hot teas (black, green, herbal)
- Iced tea (fresh brewed, concentrate, RTD)
- Functional teas (immunity, relaxation, energy blends)

Energy & Functional Beverages

- Energy drinks (mainstream and natural/clean-label)
- Functional hydration (electrolytes, enhanced water)
- Adaptogenic and nootropic beverages (stress, focus, sleep)
- Protein and performance beverages

Dairy & Plant-Based Alternatives

- Traditional dairy beverages (white milk, flavored milk, chocolate milk)
- Plant-based milks (almond, oat, soy, coconut, specialty blends)
- Emerging hybrid products (dairy + plant)

Other Cold Beverages (Selective Coverage)

- Enhanced waters, flavored waters, sparkling waters
- Lemonade, fruit juice, and juice blends
- Novelty cold beverages (slushies, frozen coffees, hybrid offerings)

Proposed Segments

- Limited service restaurants (QSR, fast casual)
- Full service restaurants (midscale, casual dining, fine dining)
- Travel & leisure (hotels, recreation, airlines)
- Business & industry (white- and blue-collar workplaces, including office coffee service)
- Healthcare (hospitals, nursing homes, continuous care retirement centers)
- Education (K-12 schools and colleges/universities)

Proposed Methodology

Activity	Description	Objective(s)
Engagement initiation	Review proposal; incorporate proprietary requests; develop introductory guides with sponsor input.	Align on timing, key dates, and priority issues.
Existing Data Review	Exhaustive review of existing information and industry sources.	Build intelligence prior to fieldwork.
Consumer Research	500 heavy to moderate foodservice beverage consumers surveyed.	Understand attitudes, awareness, and usage patterns.
Operator Research	200 foodservice operators surveyed.	Quantify operator attitudes, practices, and plans.
Supply Chain Research	Interviews with distributors, bottlers, DSD suppliers, and beverage manufacturers.	Provide insight into distribution challenges, needs, and opportunities.
Analysis and Report Delivery	Integration of findings into common-interest and proprietary deliverables.	Provide sponsor-specific recommendations and actionable insights.

Timing and Fees

- Estimated project duration: 10-12 weeks from initiation.
- Target launch: Late 4Q 2025, delivery late 1Q 2026
- Pre-launch sponsors will join a steering committee to help shape study objectives.
- $15,000 per study (per sponsor), exclusive of travel for private presentations.
- Discounted multi-study participation: two studies for $26,500 or three studies for $35,000, when confirmed in advance or together with the first sponsorship.
- **Foodservice IP can invoice 50% in January 2026.

Our billing policy is as follows:

- 50% upon project initiation
- Balance due upon submission of final report