



THE BLEND

WESTROCK COFFEE COMPANY'S QUARTERLY REPORT

Q2
2025

IN THIS ISSUE:

DRIVING C-STORE TRAFFIC

AN INSIDE LOOK AT
THE CAUSE AND
EFFECT OF COFFEE
BEVERAGE TRENDS



Executive Summary

This report explores the powerful role that beverages - especially coffee - play in driving traffic to convenience stores.

As consumer preferences shift toward speed, value, customization, and flavor, it's critical for c-store retailers to understand what motivates these shoppers.



Coffee buying behavior is shaped by both routine and impulse, influenced by daypart, and led by younger, high-spend consumers who value quality and personalization. By analyzing shopping habits and consumption patterns, retailers can better tailor offerings, capture greater share, and stay competitive in a beverage market where convenience and customization reign.

The Key Takeaways:

- 1 Beverages, especially coffee, are the #1 reason consumers visit convenience stores, with more than 80% of consumers making quick beverage purchases — outperforming snacks and fuel as a traffic driver.
- 2 Speed, convenience, and value continue to make convenience stores an attractive destination for coffee buyers, while customization and quality are crucial for future growth.
- 3 Flavor, freshness, and time of day are the top drivers of coffee choice—especially for younger, high-spend consumers.
- 4 Impulse and routine both play major roles in coffee purchases, suggesting opportunities for both targeted promotions and daypart merchandising.

BEVERAGES

DRIVE TRAFFIC AT C-STORES.

The beverage category is a powerful traffic driver for convenience stores. A recent Westrock proprietary study (May 2025) found that 80% of survey respondents visit a convenience store specifically to purchase a beverage — the most common reason for visiting, ahead of snack purchases (73%) and even fueling their vehicles (68%).

This strong pull toward beverages represents a major opportunity for c-stores, but retailers need to differentiate coffee offerings to increase sales. Convenience store customers are driven by habit, with more than half (51%) of consumers already knowing what beverage they want before going into the store. Dispensed coffee and ready-to-drink (RTD) options serve as daily essentials for many shoppers, and with 75% of beverage-buying c-store shoppers purchasing hot coffee, it is the leading coffee product behind only soft drinks (87%) in frequency of purchase.



WHO IS THE C-STORE CUSTOMER?

According to Circana data, 18–24-year-old consumers have the highest average check sizes in c-stores, with \$4.78 per eater and \$7.85 per party.

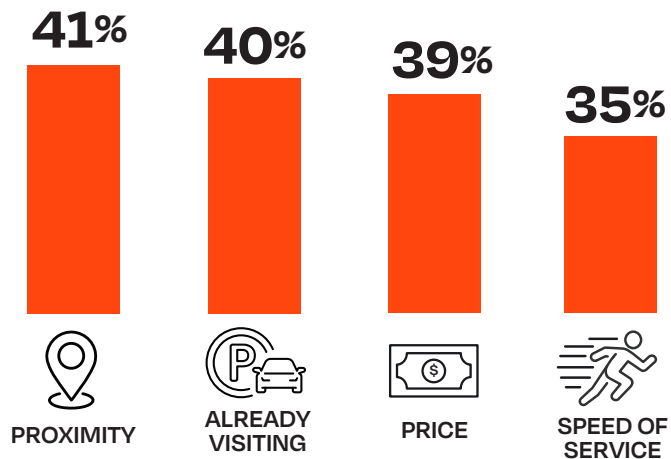
THESE YOUNGER SHOPPERS ARE:

- Highly motivated by flavor-forward, customizable, and quality-driven options
- Influencing market trends with expectations rooted in health, convenience, and personalization
- Key targets for premium and specialty coffee offerings

This age group is also fueling broader growth in c-store foodservice, with 60% of Gen Z and 59% of Millennials engaging frequently, according to Datassential.

Motivations & Behaviors

When asked why they prefer convenience stores over QSRs or coffee chains:

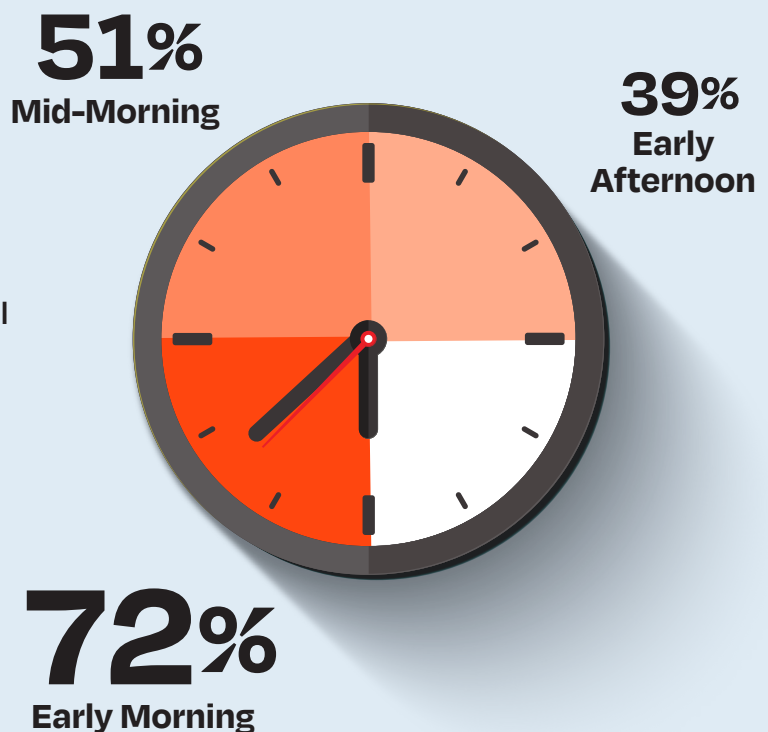


Coffee purchases in c-stores are influenced by both routine and impulse. In fact, 64% of respondents said cravings inspire their coffee purchase, and 62% stated that coffee is part of their daily routine—indicating a unique balance of spontaneity and habit.

DAYPART TRENDS

While it's no surprise that coffee is most popular in the morning, demand tapers off throughout the day—indicating incremental sales opportunities with targeted products, promotions, and merchandising aligned to specific dayparts.

DAYPART SIGNIFICANTLY INFLUENCES COFFEE PURCHASING PATTERNS:



Flavor, Freshness, & Customization

When choosing between coffee and other caffeinated beverages, top selection factors include:

- Time of day **48%**
- Coffee freshness **46%**
- Flavor preference **42%**
- Cost and thirst level **39% each**

Customization is a major growth lever:

- **65%** would be willing to pay more for it
- **63%** of respondents said that customizable flavors would make them more likely to choose a dispensed coffee
- **60%** said variety in roast levels makes them more likely to purchase dispensed coffee
- **50%** would pay extra for varying roast levels

Consumers are clear: Flavor is king, and they want coffee tailored to their preferences.



COFFEE FORMAT PREFERENCES

Coffee is purchased in multiple formats:

83%
of c-store coffee
consumers buy
dispensed coffee



69%
purchase bottled
or canned options



56%
purchase iced
coffee



Food Pairings Support Coffee Sales



For dispensed coffee:

- Breakfast sandwiches **55%**
- Pre-packaged foods **53%**
- Pastries **51%**



For RTD coffee:

- Pre-packaged foods **55%**
- Chips **53%**
- Breakfast Sandwiches **51%**



Opportunities for Growth: Quality, Customization & Cold Coffee

While proximity and convenience bring customers through the door, QSRs and coffee chains continue to maintain an edge in perceived quality and variety. In fact, 43% of consumers seek out these establishments for specialty coffee options, and 37% cite superior flavor as a key motivator.

This highlights a clear opportunity for c-stores to evolve and close the quality gap—especially as interest in made-to-order coffee continues to grow. One in four c-store consumers now express a desire for made-to-order beverages, yet this category still doesn't rank among the top 10 most purchased beverages in the channel, signaling strong unmet demand and room for innovation.

Cold coffee, in particular, presents a promising growth opportunity. Iced espresso drinks and cold brew are gaining popularity, offering c-stores a chance to diversify and modernize their dispensed beverage offerings. Paired with the rising demand for made-to-order food, integrating customizable, high-quality beverage options could help c-stores stand out from the competition, attract more discerning customers, and drive incremental revenue through premium coffee experiences.

The Road Ahead: Opportunities in Quality & Specialty

Convenience stores have always represented value to the consumer and their role as a budget-friendly alternative to QSR and foodservice will continue to grow during periods of economic uncertainty.

As more consumers report increased coffee purchases in c-stores (27%) and nearly a quarter expect to increase their purchases if coffee prices rise elsewhere, there's a chance for c-stores to capture even more share—particularly if they focus on:

- Offering specialty and customizable coffee drinks
- Highlighting flavor, freshness, and premium options
- Marketing to younger consumers and their preferences for functional, health-forward, and personalized products

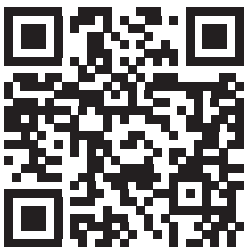
With 46% of respondents interested in additional energy ingredients and 45% in nutritional benefits, specialty coffee with a wellness angle may be a lucrative avenue.



CONCLUSION:

Coffee has become more than just a beverage in convenience stores—it's a destination driver. Retailers who embrace this role by offering fast, flavorful, and customizable coffee solutions are well-positioned to boost customer loyalty and drive repeat visits. While convenience may get customers through the door, it's quality, freshness, and personalization that keep them coming back.

By closing the quality gap with QSRs and leaning into made-to-order models, c-stores can meet growing demand for variety and customization. Cold coffee and wellness-forward offerings further expand the opportunity. With the right strategy, convenience retailers can transform their coffee programs into engines of traffic, loyalty, and incremental sales.



Partner With Us

Use the QR code on the left to learn how to partner with our beverage innovation team to develop best-in-class recipes and transform your beverage program.



Sources:

Westrock Proprietary Study on the C-Store Beverage Consumer, May 2025
Datassential Premiumization Softening Report – Elevate
Circana CREST 12ME April 2025 – Convenience Stores



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Watch for our next quarterly issue!

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