

Press Release

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Coffee Study: The Swiss prefer espresso over café crème and are increasingly making their own coffee at home due to rising prices

The coffee industry, and indeed coffee-drinking culture, are in the throes of major change. Based on a survey of 7,000 consumers from 13 countries, [the first-ever Coffee Study by the audit and consulting company Deloitte Switzerland](#) highlights the key trends shaping the domestic and international coffee market: Despite the abundance of trendy coffee shops, instant coffee is the go-to preparation method at home; young people like more milk in their coffee than older ones; and there is a growing emphasis across all age groups on sustainable production of the popular hot beverage. The study also points to a ‘coffee divide’, rather than a cultural divide, between German-speaking coffee drinkers and their French- and Italian-speaking counterparts.

Switzerland has developed into something of an international coffee hub over the past few decades. The Swiss coffee ecosystem has grown rapidly within a short space of time and now boasts a number of illustrious roasteries, as well as major global coffee traders and some of the world’s leading manufacturers of coffee machines. In terms of the value of the goods sold, Switzerland has been among the five biggest coffee exporters in recent years and is currently second in the world behind Brazil, with exports worth over 3.2 billion Swiss francs in 2023. This is a remarkable fact, considering that Switzerland neither grows its own coffee nor has a large domestic coffee market. Coffee exports even surpass those of all other agricultural produce of the country, with an annual volume much higher than that for traditional Swiss products such as chocolate and cheese.

“Switzerland is the ideal home for the international coffee market,” says Karine Szegedi, Consumer and Luxury Goods Industry Lead at Deloitte Switzerland. “The traders are all part of the same ecosystem, together with banks, insurers, shipping companies and freight forwarders, all of which support and facilitate their business. In addition, the country offers them a stable environment as well as legal certainty to operate here. Since the early 2000s, the combination of these locational factors has led to astonishing growth in the Swiss coffee industry,” adds Szegedi.

Instant trumps all other ways of making coffee

The trend towards convenient and time-saving consumption can also be seen in the coffee industry: Many consumers drink several cups of coffee a day, which is why the convenience aspect plays a key role in how people make theirs at home (see Figure 1). With 39 per cent, instant is by far the most popular worldwide, followed by filter (28 per cent) and pods (25 per cent). Consumers’ taste for convenience products is also highlighted by the demand for coffee in cans and bottles, which is proving especially popular in Asia, North America and the UK. Another interesting finding is the generational divide: Millennials like to get their caffeine fix from a can or bottle, while older generations still tend to prefer a coffee machine.

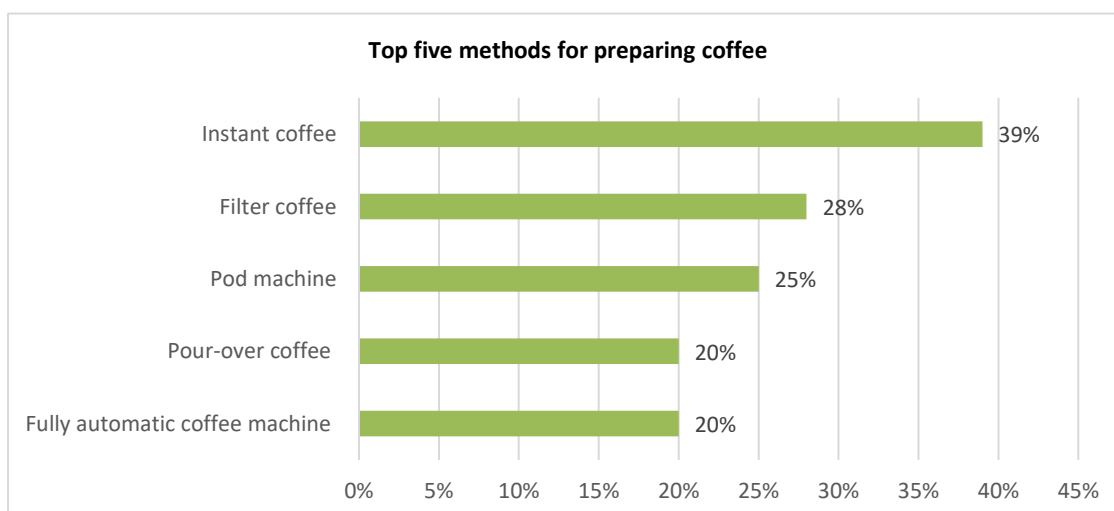


Figure 1: Answers to the question “Which of the following methods for preparing coffee do you use regularly at home?”

Overall, the study revealed significant differences between the generations. For example, younger people tend to drink less coffee than older ones. Gen Zs drink an average of one to two cups a day, compared to between two and three for baby boomers and older generations. Younger generations tend to drink other caffeinated beverages more often, such as energy drinks, which are much more popular with them than with older people (Gen Zs: 38 per cent; baby boomers and older generations: 11 per cent). There is also a generational divide in terms of the type of coffee that they routinely drink (see Figure 2): Younger consumers prefer coffee drinks containing more milk, while older ones are more likely to take theirs black.

	Gen Zs (1997–2012)	Millennials (1981–1996)	Gen Xs (1966–1980)	Baby boomers (up to 1965)
Most popular coffee drink	Latte	Cappuccino	Espresso	Espresso
Second most popular coffee drink	Cappuccino	Latte	Latte	Filter coffee
Third most popular coffee drink	Instant coffee	Instant coffee	Instant coffee	Instant coffee

Figure 2: Most popular coffee drinks by generation.

Espresso replacing café crème in Switzerland

Although the café crème is traditionally seen as every Swiss person’s favourite coffee drink, the Deloitte survey shows that it has lost its place in the popularity stakes to the espresso: 46 per cent of the respondents prefer to drink their coffee in this form, followed some distance behind by cappuccinos (37 per cent) and lattes (32 per cent). This indicates that Swiss coffee culture is becoming distinctly ‘Italianised’.

There are also signs of differences between the country’s various language regions. For instance, those in German-speaking Switzerland are most likely to add a splash of milk to their coffee, while sugar is the most popular addition in French- and Italian-speaking Switzerland. While other issues often reveal a cultural divide between Switzerland’s different language regions, this survey highlights a ‘coffee divide’.

Consumers making more coffee at home

Globally, coffee consumption at home has increased in recent years. The first wave came during the COVID-19 pandemic, when people had no choice but to make their coffee inside their own four walls. A second wave then came between 2021 and 2023, when many countries were suffering from high inflation and people cut back on non-essential spending, including visits to restaurants and cafés. Over half of the respondents (55 per cent) in the study said that rising prices had led them to make more of their own coffee at home in recent years instead of buying it out and about.

“As far as the coffee industry is concerned, the pace of inflation is both a challenge and a big opportunity,” explains Karine Szegedi. “With customers now more willing to go without things, offering value for money is becoming even more important. This is opening up new possibilities, such as selling supplies directly to consumers for them to make coffee at home. And retailers will benefit from innovative, cost-efficient strategies that attract new, price-savvy customers while also strengthening their bond with existing ones through digital channels and loyalty schemes,” she adds.

Sustainability and certification becoming increasingly important

The impact of climate change, deforestation and biodiversity loss are posing major challenges for coffee growers. For consumers, meanwhile, the issue of sustainability is becoming more important – as are schemes that certify a producer’s compliance with welfare and environmental standards along its value chain. Many coffee companies have therefore launched initiatives to offer their customers sustainably produced coffee. Almost half (46 per cent) of the consumers surveyed worldwide had heard of sustainable coffee. Over a quarter (28 per cent) said that they had tried it, and more than one-sixth (17 per cent) reported drinking it at least once a week. The respondents cited several reasons for this: Most importantly, they want to support fair pay and good working conditions at coffee producers (52 per cent) and contribute to a sustainable coffee industry (47 per cent).

“That people are willing to pay for certified, sustainably produced coffee highlights the growing awareness of transparency and fair trade,” says Roberto Micelli, Sustainability and Future of Food Lead at Deloitte Switzerland. “In the coming years, producers will need to focus not only on quality but also on strategic marketing in order to remain competitive over the long term. Rather than just being a trend, sustainability is becoming vital to business success across the entire coffee industry. Our study indicates that coffee consumers in Switzerland are prepared to pay a significant premium to get a sustainable product,” adds Micelli.

About the study

[The Deloitte Coffee Study 2024](#) is based on an online survey of 7,000 coffee drinkers aged 16 or over conducted in March 2024. It questioned 500 people from 12 countries (Brazil, China, France, Germany, India, Italy, Japan, Mexico, South Korea, Spain, the UK and the US) as well as 1,000 from Switzerland. The data from all countries was given an equal weighting in the analysis. The various country samples were representative at national level in terms of age and gender – plus in terms of income for China and India, and language distribution for Switzerland. One-to-one interviews with coffee industry experts were also conducted.

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