

# 2026 Cafe Drinks Trend Report

What independent operators should  
pilot, price, and protect this year



# The executive read

1



Matcha is a category, not a trend

2



Cold is the default format

3



Hojicha is the strongest 12-18 month pilot

4



Functional drinks add margin, not a new core menu

5



Supply chain and pricing discipline decide the winners



# Matcha has crossed the category line



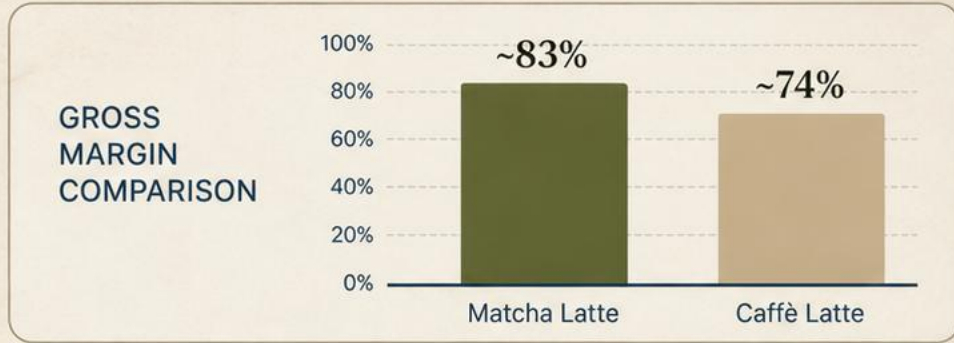
**~83%**  
gross margin



**~50%**  
of orders at  
matcha-led chains



**+107%**  
social mentions YoY



**Operator move:** build a real matcha programme, then protect sourcing



# Cold is no longer seasonal



Tracking toward 70% of US coffee shop revenue



68% of Gen Z prefer cold formats year-round



Iced lattes price above hot



Operator move: design cold builds as the core menu



# Hojicha is the pilot to start now



+173% searches for hojicha latte



Lower caffeine than matcha



Roasted, nutty, caramel-leaning flavour



Less stressed supply chain



**Operator move:** launch hot + iced, then one signature build



Now



Q3 2026



# Flavour strategy: provenance beats novelty



**Mandatory:** Matcha



**Pilot:** Hojicha, ube, yuzu



**Signature:** Pistachio, Dubai chocolate, cardamom, rose



**Content only:** extreme savory



**Operator move:** rotate quarterly, source seriously



# Functional drinks are an add-on strategy



**Protein cold foam:**  
easiest entry



**Adaptogen shot:**  
low ops risk



**Protein latte:**  
only after product testing



**Do not build a full wellness  
menu unless it is your brand**



**Operator move:**  
price add-ons cleanly



# Pricing and supply chain are the hidden battleground



Coffee COGS stays elevated



Matcha auction prices +265% YoY



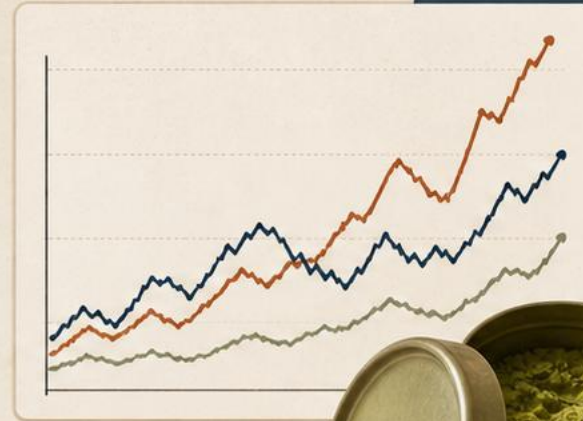
Pistachio remains supply-constrained



Quarterly price reviews, not annual



Operator move: dual-source hero ingredients



# What to do in the next 90 days

- ✓ 1. Audit gross margin by drink family
- ✓ 2. Build matcha as a real workflow
- ✓ 3. Add hot + iced hojicha pilot
- ✓ 4. Price plant milk and protein add-ons properly
- ✓ 5. Create one photogenic signature cold drink
- ✓ 6. Move to quarterly menu reviews



The menu review worksheet contains the following data:

ITEM	COST	PRICE	GROSS MARGIN	NOTES
Latte	2.30	2.53	25%	increase by 0.20
Oat Latte	2.86	2.83	28%	good margin
Matcha Latte	2.80	3.30	25%	pilot pricing
Iced Matcha	2.80	2.35	33%	review
Hojicha Latte	2.80	2.35	35%	test pricing
Oat Iced Latte	2.86	3.37	33%	add-on pricing
Protein Cold Foam	2.80	3.02	38%	