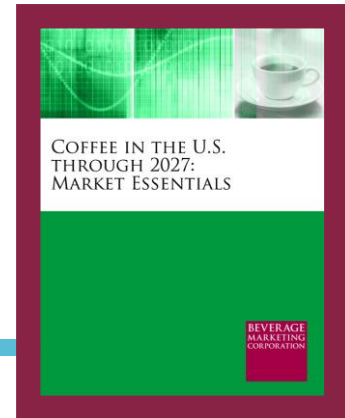


COFFEE IN THE U.S. THROUGH 2027: MARKET ESSENTIALS

2023 EDITION (Published March 2024. Data through 2022, selected preliminary 2023 figures and forecasts through 2027.) More than 100 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



This U.S. coffee market research report from Beverage Marketing Corporation puts the U.S. market into global context and delivers data on coffee production and consumption, quarterly and annual growth, imports and exports, advertising and demographics. The study also covers the ready-to-drink coffee market, specialty coffee, coffee pods and single-cup coffee machines. It also addresses the organic market and many other facets of this large yet diverse staple beverage that has moved from traditional commodity to a highly specialized market ripe for continued innovation.

The report presents the data in Excel spreadsheets, which it supplements with a concise executive summary highlighting key developments including impact of the coronavirus as well as a detailed discussion of the leading coffee companies.

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**HAVE
QUESTIONS?**

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THE ANSWERS YOU NEED

Coffee in the U.S. through 2027: Market Essentials provides in-depth data, shedding light on various aspects of the market. Questions answered in this comprehensive market report include:

- How many gallons of coffee per person were consumed in 2022 and how did that change in 2023? How did decaf fare vs. caffeinated?
- Which segments of the coffee market grew the fastest? Which segments are losing the battle for market share in the U.S.? How did these segments perform in 2023?
- How does global green coffee growth compare with growth patterns for the U.S.? Which are the leading exporters of coffee to the U.S.?
- What are the principal distribution channels for coffee? Which sales channels have gained share in 2023? Which will gain market share to 2027? Which will lose share points?
- How did the foodservice channel fare in 2022, following the impact of 2020 and rebound of 2021, and how will it perform over the next few years? What are the growth expectations for coffee in the drug store and vending channels? What are the prospects for future growth in the coffee market?

THIS U.S. COFFEE REPORT FEATURES

This coffee report examines the total United States coffee market, with coverage of ready-to-drink (RTD), specialty, fair-trade and organic coffee. Get perspective on wholesale and retail sales, volume and per capita consumption. Beverage Marketing's reliable, all-sales-channel-inclusive data includes:

- Data on volume, sales and growth and putting the U.S. market in a global perspective. Includes global and select country data on green coffee as well as fair trade coffee.
- Break-outs of volume, share and growth of coffee sub-segments including roast/ground, pods, whole bean, instant, mixes and ready-to-drink (RTD) coffee.
- Quarterly coffee market growth data.
- Detailed profiles and analysis of the leading companies and brands, discussions of their marketing activities and distribution strategies as well as company and brand sales volume data. Coverage includes the J.M. Smucker Company (Folgers), the Kraft Heinz Company (Maxwell House), Nestlé S.A., Starbucks Corporation, JAB Holdings/Keurig Dr Pepper and others.
- Volume trends for leading companies and brands for the total coffee market and by type, including whole bean, roast/ground, coffee mixes, instant coffee, coffee pods and coffee syrups.
- Advertising expenditures of the leading coffee companies and a look at category spending is broken out by 18 media types (including Internet and Spanish-language advertising).
- Consumer demographic profiles comparing consumers of specialty coffee.
- Data on green, roasted, caffeinated and decaffeinated imports.
- A look at sales, growth and share for key shelf stable and chilled RTD Coffee brands and the private label market. Brands covered include Frappuccino, Java Monster, STÖK, Starbucks Doubleshot Energy, Starbucks Doubleshot, Starbucks TripleShot, Dunkin' Donuts, Chameleon, La Colombe, Starbucks Cold Brew, Stumptown, Forto Energy (Coffee), Peet's Coffee, Rockstar Roasted, Blue Bottle, Starbucks Iced Latte, Illy, Kohana, Seattle's Best, Havana, Starbucks Chilled Coffee, International Delight Iced Coffee and others.
- Five-year compound annual growth projections (CAGRs) for the coffee market and its sub-segments, including RTD coffee through 2027.



COFFEE IN THE U.S. THROUGH 2027: MARKET ESSENTIALS

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Coffee in the U.S. through 2027: Market Essentials

March 2024

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NOTE: The information contained in this report is confidential and solely intended for the benefit of the immediate recipient hereof.

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JAB Holding Company/Keurig Dr Pepper

- Overview
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- Financial and Management

Nestlé S.A.

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Starbucks Corporation

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Inspire Brands

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Inspire sought to leverage the coffee legacy of Dunkin' via partnerships that took the brand beyond the bounds of the coffee category.

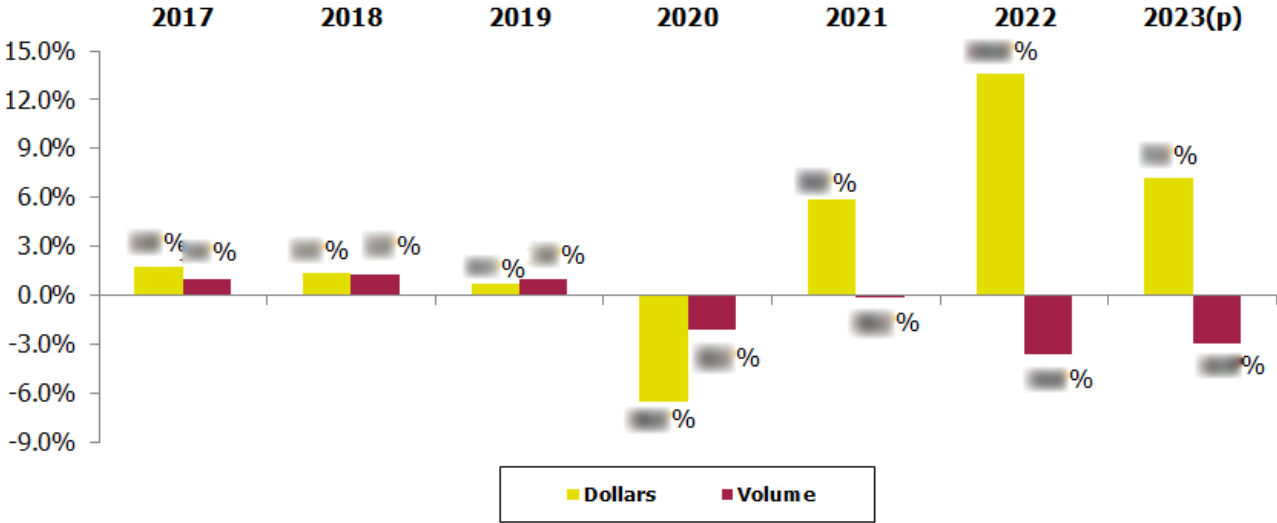
- It partnered with the Pepperidge Farm snack cracker brand Goldfish for limited edition Goldfish Dunkin' Pumpkin Spice Grahams, which rolled out in September 2022.
- In August 2021, the Dunkin' partnership with Boston, Massachusetts-based Harpoon Brewery yielded Harpoon Dunkin' Blueberry Matcha IPA, Harpoon Dunkin' Maple Crème Blonde Ale and Harpoon Dunkin' Midnight American Porter as well as Harpoon Dunkin' Pumpkin Spire Latte Ale.
- The pumpkin spice flavor returned in 2022 along with three new ones: Harpoon Dunkin' Cold Brew Coffee Porter, Harpoon Dunkin' Hazelnut Blonde Stout and Harpoon Dunkin' Coffee Roll Cream Ale. The four were configured in a variety 12-pack dubbed the Harpoon Dunkin' Box O' Beer.
- The collaboration between the beer maker and the coffee-and-donuts purveyor actually preceded the Inspire takeover but the new owner of Dunkin' continued it; 2022 marked its fifth year.
- In 2023, Dunkin' launched Dunkin' Spiked Iced Coffees and Dunkin' Spiked Iced Teas. The former, with alcohol by volume (ABV) of 6% arrived in August in four flavors: Original, Caramel, Mocha and Vanilla. The latter, with ABV of 5%, also came in four iterations: Slightly Sweet, Half & Half, Strawberry Dragonfruit Iced Tea Refresher and Pineapple Iced Tea Refresher. (Only the Dunkin' trademark appeared on labels of the 12- and 19.2-ounce cans.)
- In October 2021, Inspire teamed up with Emeryville-California-based sports nutrition company Dynamize to expand the latter's ISO100 protein powder line with two Dunkin' coffee flavors: Cappuccino and Mocha Latte.
- Though co-branded with Dunkin', the Dynamize powders were to be distributed via retailers like Walmart, Vitamin Shoppe and Kroger rather than Dunkin' locations.
- In April 2021, Dunkin' worked with Coca-Cola Company to devise a line of RTD coffees based on Girl Scout Cookie flavors like Thin Mints and S'Mores.
- In April 2023, it began dispensing Raspberry Watermelon Dunkin' Refresher drinks.
- In February 2024, it launched fruit-flavored, caffeine-containing SPARKD' Energy by Dunkin' as a seasonal offering in two flavors: Berry Burst and Peach Sunshine.

**U.S. COFFEE MARKET
SHARE OF CONSUMPTION BY SEGMENT
2017 - 2027(P)**

Segment	2017	2018	2019	2020	2021	2022	2023(p)	2027(P)
Roast/Ground	65%	65%	65%	65%	65%	65%	65%	65%
Pods	15%	15%	15%	15%	15%	15%	15%	15%
RTD	10%	10%	10%	10%	10%	10%	10%	10%
Whole Bean	5%	5%	5%	5%	5%	5%	5%	5%
Instant	5%	5%	5%	5%	5%	5%	5%	5%
Mixes	5%	5%	5%	5%	5%	5%	5%	5%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

(p) Preliminary; (P) Projected
Source: Beverage Marketing Corporation

**Coffee Retail Dollar and Volume Growth
2017 – 2023(p)**



(p) Preliminary
Source: Beverage Marketing Corporation