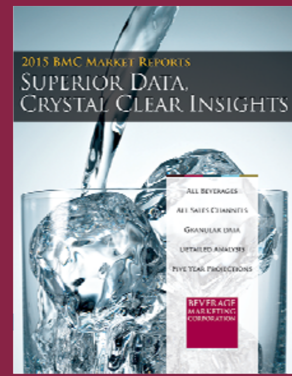
U.S. Coffee through 2019

2015 Edition (Published December 2015. Data through 2014. Market projections through 2019.) More than 225 pages, with extensive text analysis, graphs, charts and more than 100 tables



This U.S. coffee market research report from Beverages Marketing Corporation looks at the trends and issues affecting the coffee industry, including the constant innovation required to keep consumers' attention. It situates the U.S. market in its global context and delivers data on coffee production and consumption, quarterly growth, imports and exports, advertising and demographics. BMC's U.S. coffee industry research also covers the ready-to-drink coffee market and projects the U.S. coffee market five years into the future. Includes coverage of coffee pods and single-cup coffee machines.

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The answers you need

U.S. Coffee through 2019 provides in-depth data and market analysis, shedding light on various aspects of the market through reliable data and discussions of what the numbers really mean. Questions answered in this comprehensive U.S. coffee market report include:

- What developments are shaping the U.S. coffee market and impacting per capita consumption levels?
- How many gallons of coffee were consumed in 2014? How about in the first nine months of 2015?
- Which segments of the coffee market grew the fastest? Which segments are losing the battle for U.S. coffee market share?
- How does global green coffee growth compare with growth patterns for the U.S.? Which are the leading exporters of green, roasted, caffeinated and decaffeinated coffee to the U.S.?
- What is the latest news regarding organic and global fair trade coffee?
- What are the principal distribution channels for coffee?
- What are the prospects for future growth in the coffee market?

This U.S. Coffee report features

U.S. Coffee through 2019 examines the total U.S. coffee market, with coverage of ready-to-drink (RTD), specialty, Fairtrade and organic coffee. In presenting the results of its U.S. coffee research, BMC provides perspective on the market and its many facets, providing wholesale and retail sales as well as volume and per capita consumption. Through a combination of discussion backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, users of this authoritative U.S. coffee industry report get a thorough understanding of all facets of the coffee market including:

- 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 RTD (ready-to-drink) coffee
- An overview of coffee market trends, including single-cup brewers, premiumization, organic and certified coffee, commodity markets and retailer pricing. Quarterly coffee market growth data is also provided
- 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 J. M. Smucker, Kraft, Tata Coffee, Nestlé, Starbucks, Keurig Green Mountain 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.
- Examining the marketplace by its main channels of distribution, as well as in-home and away-from-home coffee consumption patterns

- Discussion and wholesale sales of the leading RTD coffee companies and brands, as well as RTD volume segmented by region and distribution channel

- Advertising expenditures of the leading coffee companies and a look at category spending 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

- Five-year compound annual growth projections (CAGRs) for the coffee market and its sub-segments, including RTD coffee through 2019.

U.S. Coffee through 2019

December 2015

BEVERAGE MARKETING CORPORATION

RESEARCH ● DATA ● CONSULTING

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

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The U.S. coffee market can be segmented into roast/ground, pods, whole bean, instant, ready-to-drink (RTD) and mixes.

- Instant coffee is also known as soluble coffee. Soluble coffee is available as spray dried, freeze dried, decaffeinated, organic and espresso. Soluble coffee is primarily prepared with higher caffeine-containing robusta coffee beans or unwashed Arabica beans. Soluble coffee contains more oil which keeps the flavors intact, which is also the primary reason why soluble coffee is looked down as poor quality coffee.
- RTD coffee remains a small segment dominated by a single brand, Frappuccino.

Not all Americans drink coffee with the same frequency and passion. Geographic region has a strong influence on the type and amount of coffee that is consumed.

- With the same cafés on every street corner, some of the distinctions separating geographic boundaries have blurred in recent years, but consumers still talk about their hometown favorite brews.
- While the enormous popularity of coffee consumption today sprang from roots in the Northwest, other regions are long known for distinct styles such as chicory flavor in Louisiana.
- Americans buy their staple roast-and-ground coffee packed in cans, bricks or bags primarily from supermarkets.
- Price is an important reason besides convenience why most people buy coffee from supermarkets rather than specialty stores. However, the growing proliferation of higher-priced coffees in supermarkets also gives gourmands a chance to splurge at the local grocer as well.
- Slightly more than half of coffee consumed in-home is purchased from supermarkets.

Exhibit 7.83

THE NATIONAL RTD COFFEE MARKET
SHARE OF VOLUME BY DISTRIBUTION CHANNEL
2009 – 2019(P)

Sales Channels	2009	2010	2011	2012	2013	2014	2019(P)
OFF-PREMISE							
Convenience Stores/Gas	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Supermarkets	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Mass Merchandisers*	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Drug Stores	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
All Other**	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
ON-PREMISE							
Foodservice	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Vending	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
All Other***	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%	[illegible]%
Subtotal	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**
TOTAL CHANNELS	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**	**[illegible]%**

(P) Projected

** Includes Wal-Mart*

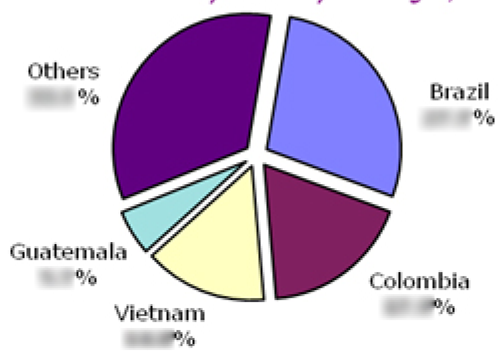
*** Includes club stores, dollar stores, health-food stores, military and online retailers*

**** Includes schools, "mom & pop" stores, airlines, stadiums, etc.*

Source: Beverage Marketing Corporation

TOP FOUR SOURCES ACCOUNTED FOR 66% OF COFFEE IMPORTS

(Share of volume by country of origin, 2014)



Source: Beverage Marketing Corporation; U.S. Department of Commerce