

U.S. COFFEE TOPLINE

2016 EDITION (Published December 2016. Data through 2015. Market projections through 2020.) More than 25 pages, with extensive text analysis, graphs, charts.

U.S. *Coffee Topline* from Beverage Marketing Corporation provides a brief overview of the coffee category with key data and five year forecasts. Perfect for investors, entrepreneurs requiring statistics for their business plan, ad agencies preparing an account pitch or anyone who needs a quick view of the coffee sector.

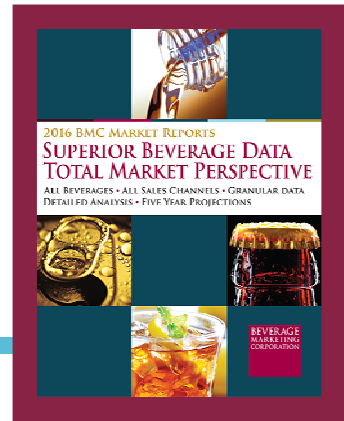
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HAVE
QUESTIONS?

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THE ANSWERS YOU NEED

U.S. Coffee Topline offers a concise summary of the overall market. Questions answered include:

- What has been the long-term trend in coffee volume? How has RTD coffee fared under similar measures in the past couple of decades?
- What is the share breakdown of the coffee market in terms of segments? How has this changed in the last five years?
- How big is the global green coffee market and how large are the U.S. coffee export and import markets?
- Which coffee segments are likely to gain share at the expense of others to 2020?

THIS REPORT FEATURES

U.S. Coffee Topline contains key information and identifies important industry trends concerning the U.S. coffee market, including premiumization, segmentation, commodity and retail price activity and single-cup appliances.

The report features category volume and per capita consumption data, volume by coffee segment, import and export data, ready-to-drink coffee volume and wholesale dollars, global organic coffee volume, coffee advertising expenditures, global green coffee volume and five-year projections.

U.S. Coffee Topline

December 2016

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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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An intriguing concept has arisen in the coffee market: mixing butter with coffee.

- Dave Asprey is credited with popularizing this concept, dubbing his coffee-and-butter concoction as Bulletproof Coffee which offers the promise of taking the pounds off via a process called ketosis and offering a sustainable energy lift.
- Over the past couple of years, Asprey has reaped a bounty of press for that “bio-hacking” notion, writing the best-selling *The Bulletproof Diet* and a cookbook.
- As a quantitatively driven techie, Asprey was willing to treat himself like a lab specimen, trying various nutrient combinations and measuring the results via a decision support system, until he found himself in 2004 at a humble guest house in Tibet, where he was served yak butter tea, a weak puerh tea with salt and butter from yaks. The effect was immediate: “My brain turned on in a new and different way,” as he’s recalled. “That made me come back and start hacking,” trying to recreate that tea while carefully measuring effects to refine the formula.
- The drink triggers weight loss via ketosis, a metabolic state triggered by a lack of carbohydrates that kicks fat-burning into overdrive, as a fascinated *Fast Company* has described the process. “Power Mind and Body” is the brand’s on-pack slogan. The recipe employs the company’s own coffee (other coffees, even at the high end, contain mold toxins, Asprey claims) plus Bulletproof XCT Oil (medium-chain triglycerides sourced from coconut oil) plus grass-fed butter of the sort sold under Ireland’s Kerrygold trademark.
- Among capital rounds was \$9 million from Trinity Ventures, an early investor in Starbucks, Jamba Juice and FitBit, with the proceeds funding a Santa Monica café, since followed by others in Los Angeles and the Bay Area.
- A potential competitor is Grass Fed Coffee, which is at the very early stages of introducing “the world’s first ready to drink butter coffee.” It is taking pre-orders for a 12-count case of 8-ounce cans priced at \$3.99 per can.
- While seemingly a strange concept, there has been a growing willingness – by niche audiences at least – to reject the conventional wisdom that saturated fat is deleterious to health.
- As for coffee itself, studies continue to suggest its positives, such as possible reduced risk of multiple sclerosis and colon cancer, among other things. Marketers are reluctant to push the envelope in this regard, and besides, most consumers are more concerned with a pick-me-up than with benefits that are not as easy to evince.

Exhibit 2

**U.S. COFFEE MARKET
COMPOUND ANNUAL VOLUME GROWTH
1995 – 2020(P)**

Period	Compound Annual Growth Rate
1990 – 1995	■ %
1991 – 1996	■ %
1992 – 1997	■ %
1993 – 1998	■ %
1994 – 1999	■ %
1995 – 2000	■ %
1996 – 2001	■ %
1997 – 2002	■ %
1998 – 2003	■ %
1999 – 2004	■ %
2000 – 2005	■ %
2001 – 2006	■ %
2002 – 2007	■ %
2003 – 2008	■ %
2004 – 2009	■ %
2005 – 2010	■ %
2006 – 2011	■ %
2007 – 2012	■ %
2008 – 2013	■ %
2009 – 2014	■ %
2010 – 2015	■ %
2015 – 2020(P)	■ %

(P) Projected

Source: Beverage Marketing Corporation