

# U.S. COFFEE THROUGH 2021

2017 EDITION (Published December 2017. Data through 2016. Market projections through 2021.) More than 225 pages, with extensive text analysis, graphs, charts and more than 100 tables.

This U.S. coffee market research report looks at the trends and issues affecting the coffee industry, including the constant innovation required to keep consumer attention. It puts the U.S. market into global context and delivers data on coffee production and consumption, quarterly growth, imports and exports, advertising and demographics. The industry research also covers the ready-to-drink coffee market, specialty coffee, coffee pods and single-cup coffee machines.

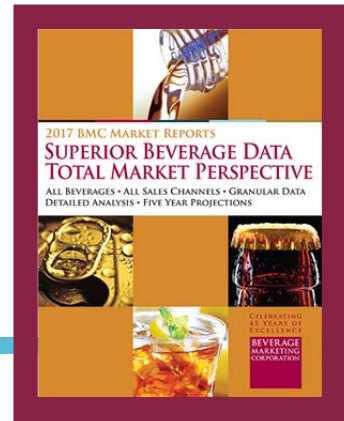
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QUESTIONS?

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## THE ANSWERS YOU NEED

*U.S. Coffee through 2021* 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 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 2016? How about in the first nine months of 2017?
- Which segments of the coffee market grew the fastest? Which segments are losing the battle for market share in the U.S.?
- 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? Which sales channels will gain market share? Which will lose share points?
- How will the foodservice channel fare 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, Fairtrade and organic coffee. Get perspective on wholesale and retail sales, volume and per capita consumption. Through a combination of discussion backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, readers of this authoritative industry report will gain thorough understanding 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 Heinz, Tata Coffee, Nestlé, Starbucks, Joh. A Benckiser 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 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.
- Five-year compound annual growth projections (CAGRs) for the coffee market and its sub-segments, including RTD coffee through 2021.

# U.S. Coffee through 2021

December 2017

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

**THE NATIONAL RTD COFFEE MARKET  
SHARE OF VOLUME BY DISTRIBUTION CHANNEL  
2011 – 2021(P)**

Sales Channels	2011	2012	2013	2014	2015	2016	2021(P)
<b>OFF-PREMISE</b>							
Convenience Stores/Gas	15%	15%	15%	15%	15%	15%	15%
Supermarkets	15%	15%	15%	15%	15%	15%	15%
Mass Merchandisers*	15%	15%	15%	15%	15%	15%	15%
Drug Stores	15%	15%	15%	15%	15%	15%	15%
All Other**	15%	15%	15%	15%	15%	15%	15%
<b>Subtotal</b>	<b>60%</b>	<b>60%</b>	<b>60%</b>	<b>60%</b>	<b>60%</b>	<b>60%</b>	<b>60%</b>
<b>ON-PREMISE</b>							
Foodservice	15%	15%	15%	15%	15%	15%	15%
Vending	5%	5%	5%	5%	5%	5%	5%
All Other***	15%	15%	15%	15%	15%	15%	15%
<b>Subtotal</b>	<b>35%</b>	<b>35%</b>	<b>35%</b>	<b>35%</b>	<b>35%</b>	<b>35%</b>	<b>35%</b>
<b>TOTAL CHANNELS</b>	<b>95%</b>	<b>95%</b>	<b>95%</b>	<b>95%</b>	<b>95%</b>	<b>95%</b>	<b>95%</b>

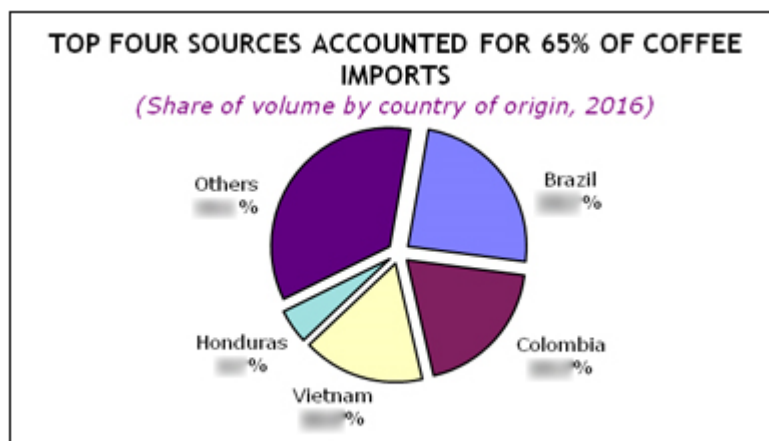
(P) Projected

\* 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



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