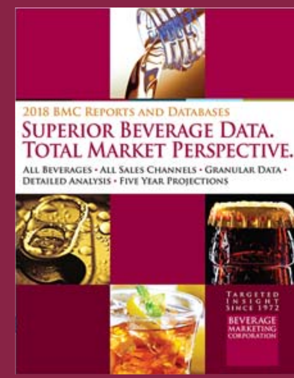
Coffee in the U.S. through 2022

2018 Edition (Published December 2018. Data through 2017. Market projections through 2022.) More than 250 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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INSIDE:

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The answers you need

Coffee in the U.S. through 2022 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 2017? How about in the first nine months of 2018?
- How has JAB Holding's Keurig Green Mountain's merger with Dr Pepper Snapple changed the industry?
- 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 (Folgers), Kraft Heinz (Maxwell House), Tata Coffee, Nestlé, Starbucks, JAB Holdings (Keurig Dr Pepper, Peet's, etc.) 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, including the cold-brew coffee segment, 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 2022.

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December 2018

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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Although coffee is mostly ground at roasters or grocery stores, grinding whole beans at home is one trend that has been prevalent, especially for those who are fond of preparing their own blend.

- In comparison to ground coffee, whole bean coffee accounts for a small share of consumption in U.S. Whole bean coffee requires extra effort for preparation which might be the reason for its lack of consumption growth.

- In 2006, India-based Tata Group's coffee division, Tata Coffee Ltd., made its entry in the U.S. coffee market by acquiring Eight O'Clock Coffee, which is one of the leading retailers of whole bean coffee.

- In 2016, Eight O'Clock Coffee introduced a new roast/ground line called Infusions that combines coffee with functional ingredients in 10-ounce bags. Alert blends in caffeine and guarana and Relax is decaf coffee with chamomile and lavender. The brand conducted a 10-city sampling tour behind the line, as well as radio ads and TV spots. Tagline: "There's a Reason Behind Every Sip."

- In 2017, the company added three new Infusions: Super Spice, with turmeric and cinnamon; Acai Glow, with açaí berry; and B6 Metabolism, containing a fruit and herbal blend. The latter two have since been discontinued.

- In 2018, Eight O'Clock Coffee ran an online game called "Great Coffee Break" that awarded eight grand prize winners a year's worth of free groceries (valued at $8,000).

- Starbucks is another prominent whole bean brand. In 2017, whole bean accounted for [illegible]% of coffee volume — down from [illegible]% in 2012. Whole bean share is expected to remain at [illegible]% by 2022.

Exhibit 7.83

THE NATIONAL RTD COFFEE MARKET
SHARE OF VOLUME BY DISTRIBUTION CHANNEL (r)
2012 – 2022(P)

Sales Channels	2012	2013	2014	2015	2016	2017	2022(P)
OFF-PREMISE							
Convenience Stores/Gas	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Supermarkets	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Mass Merchandisers*	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Drug Stores	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
All Other**	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
ON-PREMISE							
Foodservice	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Vending	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
All Other***	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
TOTAL CHANNELS	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**

(r) Revised; (P) Projected

** Includes Wal-Mart*

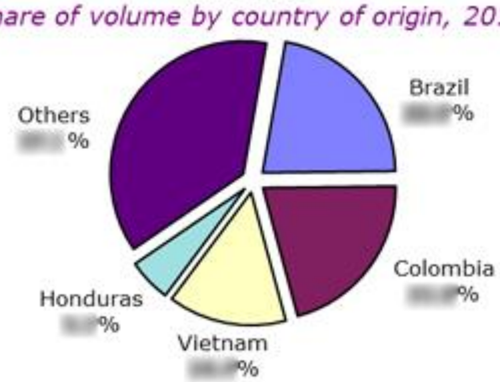
*** Includes club stores, dollar stores, "mom & pop" stores, health-food stores, military and online retailers.*

**** Includes schools, airlines, stadiums, etc.*

Source: Beverage Marketing Corporation

TOP FOUR SOURCES ACCOUNTED FOR 63% OF COFFEE IMPORTS

(Share of volume by country of origin, 2017)



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