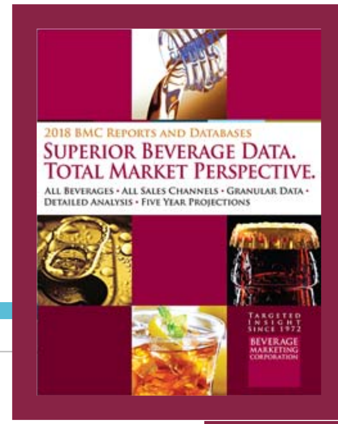
U.S. COFFEE TOPLINE

2018 EDITION (Published December 2018. Data through 2017. Market projections through 2022.) More than 30 pages, with text analysis and charts.



U.S. *Coffee Topline* from Beverage Marketing Corporation provides a data overview of the coffee category with key statistics 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 birds-eye view 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 2022?

This report features

U.S. Coffee Topline 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 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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Instant or soluble coffee is powdered coffee prepared by the spraying and drying of brewed coffee in a vacuum. The process removes the water content and delivers an end product of frozen coffee granules.

- In terms of consumption, instant coffee has fewer loyalists among Americans than Russians or Asians.
- The common perception of instant coffee is that it is does not live up to the quality standard of coffee preferred by Americans who prefer to buy the whole bean and brew their own coffee at home. Therefore, it becomes a challenge for retailers to introduce instant coffee of recognized quality in the market as the retailer has to outweigh preconceived notions about instant coffee.
- On the other hand, the features in favor of instant coffee are easy availability, easy usage and convenience. In 2017, instant coffee consumption declined for the seventh straight year, to [redacted] gallons.
- Interestingly, there is a small niche of superpremium instant coffee emerging in the marketplace, including names like Swift Cup Coffee, Intelligentsia and Sudden Coffee that are using upgraded techniques to produce better-tasting soluble coffee. It comes at a price: about $2 to $3 per serving.
- Mixes combine instant coffee with non-dairy creamer. Kraft's Maxwell House International (formerly, General Foods International Coffees) is a leader in the declining segment. In 2017, mixes registered volume of [redacted] gallons, with a further decrease expected to 2022.
- Growth in consumption could again be driven by the introduction of better quality products in the market. Instant coffee will find its usage in instant cappuccino mixes, instant mocha combined with chocolate and other flavored varieties.

After a decline in 2009, RTD coffee consumption has resumed its customary growth.

- In 2017, RTD coffee consumption was [redacted] gallons, up from [redacted] gallons in 2016. By 2022, RTD coffee is expected to grow to [redacted] gallons.
- In earlier times, American consumers were averse to drinking RTD coffee as it was not perceived as a refreshment beverage and, further, it was highly priced. Later, clever marketing strategies established RTD coffee as a snack drink. More varieties of RTD coffee beverages have entered the market to provide different proportions of milk and sweetness.

Exhibit 2

U.S. COFFEE MARKET
COMPOUND ANNUAL VOLUME GROWTH
1995 – 2022(P)

Period	Compound Annual Growth Rate
1990 – 1995	[illegible]%
1991 – 1996	[illegible]%
1992 – 1997	[illegible]%
1993 – 1998	[illegible]%
1994 – 1999	[illegible]%
1995 – 2000	[illegible]%
1996 – 2001	[illegible]%
1997 – 2002	[illegible]%
1998 – 2003	[illegible]%
1999 – 2004	[illegible]%
2000 – 2005	[illegible]%
2001 – 2006	[illegible]%
2002 – 2007	[illegible]%
2003 – 2008	[illegible]%
2004 – 2009	[illegible]%
2005 – 2010	[illegible]%
2006 – 2011	[illegible]%
2007 – 2012	[illegible]%
2008 – 2013	[illegible]%
2009 – 2014	[illegible]%
2010 – 2015	[illegible]%
2011 – 2016	[illegible]%
2012 – 2017	[illegible]%
2017 – 2022(P)	[illegible]%

(P) Projected

Source: Beverage Marketing Corporation