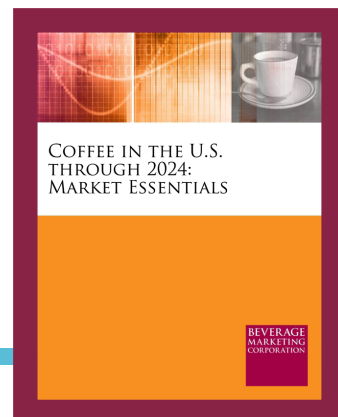


COFFEE IN THE U.S. THROUGH 2024: MARKET ESSENTIALS

2020 EDITION (Published December 2020. Data through 2019. Market projections through 2024.) More than 100 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



This U.S. coffee market research report 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.

The report presents the data in Excel spreadsheets, which it supplements with a concise executive summary highlighting key developments including impact of the coronavirus as well as a detailed discussion of the leading coffee companies.

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**HAVE
QUESTIONS?**

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THE ANSWERS YOU NEED

Coffee in the U.S. through 2024: Market Essentials provides in-depth data, shedding light on various aspects of the market. Questions answered in this comprehensive market report include:

- How many gallons of coffee per person were consumed in 2019 and how did that change in 2020?
- Which segments of the coffee market grew the fastest? Which segments are losing the battle for market share in the U.S.? How did these segments perform in 2020?
- How does global green coffee growth compare with growth patterns for the U.S.? Which are the leading exporters of coffee to the U.S.?
- What are the principal distribution channels for coffee? Which sales channels have gained share in 2020? Which will gain market share to 2024? Which will lose share points?
- How did the foodservice channel fare in 2020 and how will it perform 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, fair-trade and organic coffee. Get perspective on wholesale and retail sales, volume and per capita consumption. Beverage Marketing's reliable, all-sales-channel-inclusive data includes:

- 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 ready-to-drink (RTD) coffee.
- Quarterly coffee market growth data.
- 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 The J.M. Smucker Company (Folgers), The Kraft Heinz Company (Maxwell House), Nestlé S.A., Starbucks Corporation, 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.
- 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 2024.



COFFEE IN THE U.S. THROUGH 2024: MARKET ESSENTIALS

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Coffee in the U.S. through 2024: Market Essentials

December 2020

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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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J.M. Smucker is trying to use Café Bustelo to make inroads with millennials.

- In 2020, in partnership with the Hispanic Association of Colleges and Universities, the brand ran its seventh annual Café Bustelo El Café del Futuro Scholarship program that awards Latino students with college scholarships.
- In September 2019, Café Bustelo received its first national ad campaign, including Spanish- and English-language TV. The TV ad featured bright animation using the primary colors of the brand (yellow and red) as well as blue and was evocative of its Miami heritage. There is no voice-over in the ad — in fact, the ad is not adapted for non-Latin audiences — but rather a bouncy tune sung in Spanish.
- Café Bustelo has performed well overall, helping to cushion the lackluster performance of Folgers. (In 2020, it should be noted, Folgers has performed well as new and lapsed consumers flock to the brand.)

J.M. Smucker has a decades-long licensing deal with Dunkin' Brands to distribute Dunkin' Donuts brand packaged coffee in supermarkets, club stores, mass merchandisers and other outlets (although not in Dunkin' stores themselves). It later added Dunkin' K-Cups to the arrangement.

- Initially, Dunkin' Brands stood firm on selling Dunkin' K-Cups only through its cafés so as not to alienate franchisees — which operate the vast majority of locations. However, a workaround was reached in spring 2015, with J.M. Smucker, Keurig Green Mountain (owner of the K-Cup trademark) and Dunkin' Brands signing an agreement allowing for Smucker to distribute and market Dunkin' K-Cups under license from Keurig Green Mountain in supermarkets, mass merchandisers, club stores, drug stores, dollar stores and home improvement stores. Keurig Green Mountain would manufacture the pods and also have the right to distribute them to specialty stores and office superstores.
- Dunkin' Donuts (bagged and K-Cups) has helped to stem further declines in J.M. Smucker's coffee sales. In summer 2017, it reached \$500 million in annualized sales for the first time.
- The Dunkin' Donuts brand obviated the need for Millstone. In September 2016, J.M. Smucker announced it would discontinue the Millstone brand due to disappointing sales.

In 2018, J.M. Smucker introduced a millennial-friendly coffee brand called 1850.

- Joining Dunkin' as an offering sold at a premium to Folgers, 1850 is a comprehensive platform consisting of ground, whole bean, K-Cup and even RTD coffee. The ground and whole bean coffees are packaged in sleek-looking blue bags.

U.S. COFFEE MARKET
SHARE OF CONSUMPTION BY SEGMENT
2014 – 2024(P)

Segment	2014	2015	2016	2017	2018	2019	2020(p)	2024(P)
Roast/Ground	■ %	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Pods	■ %	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Whole Bean	■ %	■ %	■ %	■ %	■ %	■ %	■ %	■ %
RTD	■ %	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Instant	■ %	■ %	■ %	■ %	■ %	■ %	■ %	■ %
Mixes	■ %	■ %	■ %	■ %	■ %	■ %	■ %	■ %
TOTAL	■ %	■ %	■ %	■ %	■ %	■ %	■ %	■ %

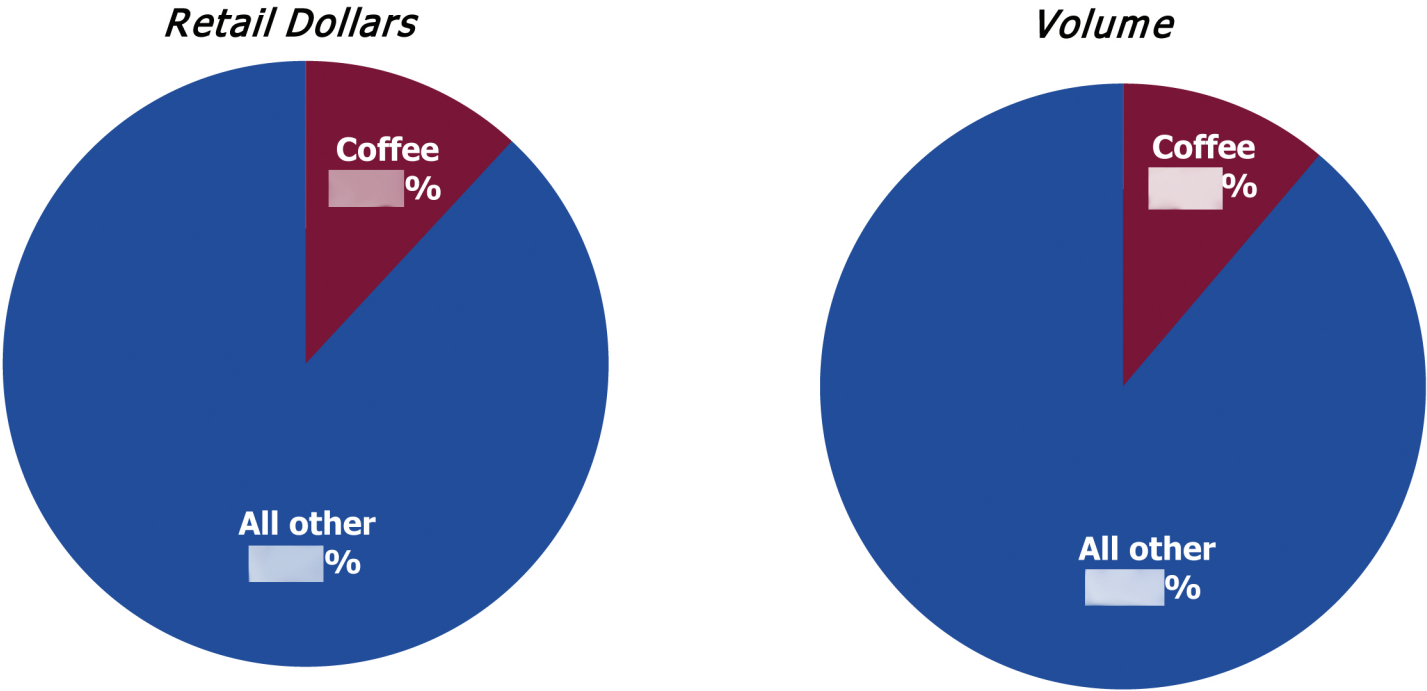
(p) Preliminary; (P) Projected

Source: Beverage Marketing Corporation

Coffee Volume and Retail Dollars Have Risen in Recent Years

- Coffee is an important component of the overall U.S. multiple beverage market (including alcohol), with a double-digit share of both volume and retail dollars. Since 2014, coffee volume share has grown while coffee retail dollar share has declined slightly.
- The proliferation of coffee houses like Starbucks and the related interest among consumers in specialty coffee have manifested themselves in what sort of coffee consumers are imbibing and where they are acquiring it. They have altered, although not radically so, how much coffee Americans consume.

Coffee in the U.S.
Share of Multiple Beverage Market Retail Dollar Sales and Volume
2019



Source: Beverage Marketing Corporation