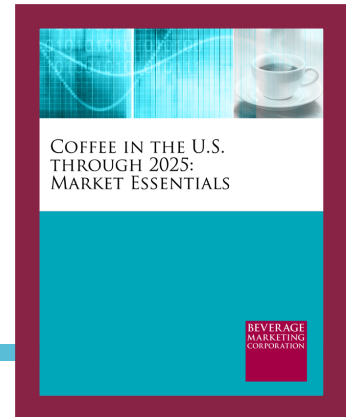


COFFEE IN THE U.S. THROUGH 2025: MARKET ESSENTIALS

2021 EDITION (Published December 2021. Data through 2020. Market projections through 2025.) 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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INSIDE:

REPORT OVERVIEW

A brief discussion of this report's key features. **2**

TABLE OF CONTENTS

A detailed outline of this report's contents and data tables. **6**

SAMPLE TEXT AND INFOGRAPHICS

Examples of report text, data content, layout and style. **12**



**HAVE
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THE ANSWERS YOU NEED

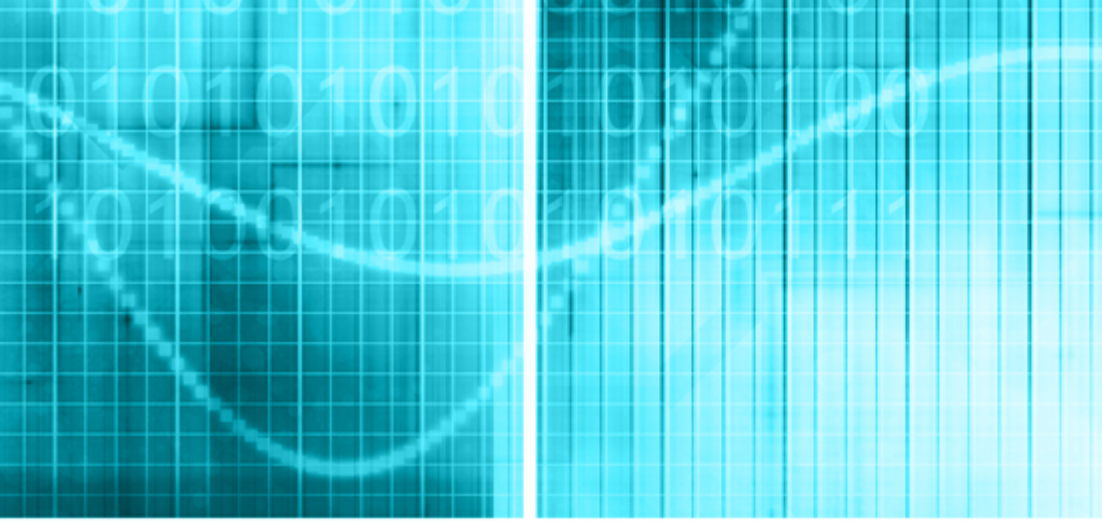
Coffee in the U.S. through 2025: Market Essentials provides in-depth data, shedding light on various aspects of the market. Questions answered in this comprehensive market report include:

- How many gallons of coffee per person were consumed in 2020 and how did that change in 2021?
- 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 2021?
- 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 2025? 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 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 2025.



COFFEE IN THE U.S. THROUGH 2025: MARKET ESSENTIALS



Coffee in the U.S. through 2025: Market Essentials

December 2021

BEVERAGE
MARKETING
CORPORATION

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Contents

Table of Contents

TABLE OF CONTENTS

Executive Summary

Introduction, Objective & Methodology	3
Introduction	4
Objective and Scope	5
Methodology	5
Coffee Category Definitions	6
The U.S. Coffee Market	7
Coffee in the U.S. Share of Multiple Beverage Market Retail Dollar Sales and Volume 2020	8
Key Beverage Categories Volume Change 2021	9
Volume Share of Multiple Beverage Market by Category 2021	9
Coffee Retail Dollar and Volume Growth 2015 - 2021	10
Coffee Per Capita Consumption 1991 – 2021	11
Global Green Coffee Market Change in Production 2013 – 2020	12
Coffee Categories and Trends	13
Topline Trends	14
U.S. Households Regularly Using Keurig Brewers 2015 – 2020	16
Share of Coffee Consumption by Segment 2016 and 2021	17
Consumption and Share by Coffee Segment 2020 – 2021 and the Impact of Covid-19	18
Wholesale Dollar Share by Coffee Segment 2015 and 2020	20
Wholesale Dollar Sales and Share by Coffee Segment 2020 – 2021 and the Impact of Covid-19	21
Wholesale Dollar Share by Coffee Segment 2020 and 2021	22
Leading Exporters of Coffee to the U.S. 2020	23
Leading Countries' Share of U.S. Imported Coffee Volume 2015 and 2020	24
Share of Coffee Volume by Distribution Channel 2015 and 2020	25
Coffee Distribution Channels by Volume and Share 2020 – 2021	26
Leading Coffee Distribution Channels in the Age of Covid-19	27
Share of Coffee Volume by Distribution Channel 2020 and 2021	28
Coffee Retailers by Number of U.S. Locations 2020	29
Leading Coffee Manufacturers by Volume 2020	30
Leading Coffee Manufacturers' Share of Volume 2015 and 2020	31
Leading Coffee Brands by Volume 2020	32
RTD Coffee Wholesale Dollar and Volume Growth 2014 – 2021	33
RTD Coffee Wholesale Dollar and Volume Growth 2014 – 2020	34
Leading RTD Coffee Brands by Volume 2020	35
Leading Coffee Companies by Ad Expenditures 2020	36
U.S. Coffee Advertising by Media 2020	37
Global Green Coffee Estimated Consumption by Country 2020	38
Leading Countries by Estimated Green Coffee Consumption 2015 and 2020	39
Global Fairtrade Coffee Market Estimated Sales Volume by Country 2020	40
Leading Countries by Estimated Fairtrade Coffee Volume 2015 and 2020	41

TABLE OF CONTENTS

Executive Summary

Outlook and Future	42
Projected Coffee Wholesale Dollar and Volume Compound Annual Growth 2010 – 2025----	43
Projected Coffee Wholesale Dollar Sales by Segment 2020 and 2025	44
Coffee Distribution Channels by Volume and Share 2020 – 2025	45
Projected Coffee Volume Share by Distribution Channel 2020 and 2025	46
Projected RTD Coffee Wholesale Dollar and Volume Compound Annual Growth 2010 – 2025	47

Leading Company Profiles

Leading Coffee Companies

The J. M. Smucker Company

- Overview and Financial
- Marketing

The Kraft Heinz Company

- Overview and Financial
- Marketing

JAB Holding Company/Keurig Dr Pepper

- Overview
- Marketing
- Financial and Management

Nestlé S.A.

- Overview and Financial
- Marketing

Starbucks Corporation

- Overview and Financial
- Marketing

Inspire Brands

- Overview and Financial
- Marketing

Exhibits

1. THE U.S. COFFEE MARKET

- 1.1 U.S. Coffee Market Volume and Growth 1987 – 2025
- 1.2 U.S. Coffee Market Wholesale and Retail Sales and Growth 1998 – 2025
- 1.3 U.S. Coffee Market Wholesale and Retail Price Per Gallon 1998 – 2025
- 1.4 U.S. Coffee Market Compound Annual Volume Growth 1995 – 2025
- 1.5 U.S. Coffee Market Per Capita Consumption 1987 – 2025

TABLE OF CONTENTS

Exhibits

2. THE U.S. COFFEE MARKET BY SEGMENT

- 2.6 U.S. Coffee Market Estimated Consumption by Segment 2015 – 2025
- 2.7 U.S. Coffee Market Share of Consumption by Segment 2015 – 2025
- 2.8 U.S. Coffee Market Change in Consumption by Segment 2016 – 2025
- 2.9 U.S. Coffee Market Estimated Per Capita Consumption by Segment 2015 – 2025
- 2.10 U.S. Coffee Market Estimated Wholesale Dollars by Segment 2015 – 2025
- 2.11 U.S. Coffee Market Share of Wholesale Dollars by Segment 2015 – 2025
- 2.12 U.S. Coffee Market Change in Wholesale Dollars by Segment 2016 – 2025
- 2.13 U.S. Q1 2021 Estimated Volume, Share and Growth by Coffee Segment
- 2.14 U.S. Q2 2021 Estimated Volume, Share and Growth by Coffee Segment
- 2.15 U.S. Q3 2021 Estimated Volume, Share and Growth by Coffee Segment
- 2.16 U.S. 9M 2021 Estimated Volume, Share and Growth by Coffee Segment
- 2.17 U.S. Coffee Market Volume Comparisons Between Pre-COVID and Actual 2020 by Segment 2019 - 2021
- 2.18 U.S. Coffee Market Share of Volume Comparisons Between Pre-COVID and Actual 2020 by Segment 2019 - 2021
- 2.19 U.S. Coffee Market Change in Volume Comparisons Between Pre-COVID and Actual 2020 by Segment 2020 - 2021
- 2.20 U.S. Coffee Market Retail Dollars Comparisons Between Pre-COVID and Actual 2020 by Segment 2019 - 2021
- 2.21 U.S. Coffee Market Share of Retail Dollars Comparisons Between Pre-COVID and Actual 2020 by Segment 2019 - 2021
- 2.22 U.S. Coffee Market Change in Retail Dollars Comparisons Between Pre-COVID and Actual 2020 by Segment 2020 - 2021
- 2.23 U.S. Coffee Market Wholesale Dollars Comparisons Between Pre-COVID and Actual 2020 by Segment 2019 - 2021
- 2.24 U.S. Coffee Market Share of Wholesale Dollars Comparisons Between Pre-COVID and Actual 2020 by Segment 2019 - 2021
- 2.25 U.S. Coffee Market Change in Wholesale Dollars Comparisons Between Pre-COVID and Actual 2020 by Segment 2020 - 2021

3. THE U.S. SPECIALTY COFFEE MARKET

- 3.26 U.S. Specialty Coffee Market Estimated Retail Sales and Growth 1999 – 2021
- 3.27 U.S. Specialty Coffee Market Estimated Percentage of Adults Drinking Specialty Coffee 2001 – 2021
- 3.28 U.S. Specialty Coffee Market Estimated Number of Locations 2001 – 2021
- 3.29 U.S. Specialty Coffee Market Percentage of Coffee Prepared Out-of-Home 2014 – 2021
- 3.30 U.S. Specialty Coffee Market Percent Change In Options Of Buying Coffee To Drink At Home 2019 – 2020

TABLE OF CONTENTS

Exhibits

3. THE U.S. SPECIALTY COFFEE MARKET (cont'd)

- 3.31 U.S. Specialty Coffee Market Estimated Percentage of Past-Day Coffee Penetration 2017 – 2021
- 3.32 U.S. Specialty Coffee Market Percent Using Preparation Methods Among Past-Day Coffee Drinkers 2021

4. U.S. COFFEE IMPORTS, EXPORTS AND STOCKS

- 4.33 Imported Coffee Market All Countries and Types 1998 – 2020
- 4.34 Imported Coffee Market Volume by Coffee Type 2015 – 2020
- 4.35 Imported Coffee Market Share of Volume by Coffee Type 2015 – 2020
- 4.36 Imported Coffee Market Change in Volume by Coffee Type 2016 – 2020
- 4.37 Imported Coffee Market Volume by Country of Origin 2015 – 2020
- 4.38 Imported Coffee Market Share of Volume by Country of Origin 2015 – 2020
- 4.39 Imported Coffee Market Change in Volume by Country of Origin 2016 – 2020
- 4.40 Imported Coffee Market Not Roasted, Not Decaffeinated Volume by Country of Origin 2015 – 2020
- 4.41 Imported Coffee Market Share of Not Roasted, Not Decaffeinated Volume by Country of Origin 2015 – 2020
- 4.42 Imported Coffee Market Change in Not Roasted, Not Decaffeinated Volume by Country of Origin 2016 – 2020
- 4.43 Imported Coffee Market Not Roasted, Decaffeinated Volume by Country of Origin 2015 – 2020
- 4.44 Imported Coffee Market Share of Not Roasted, Decaffeinated Volume by Country of Origin 2015 – 2020
- 4.45 Imported Coffee Market Change in Not Roasted, Decaffeinated Volume by Country of Origin 2016 – 2020
- 4.46 Imported Coffee Market Roasted, Not Decaffeinated Volume by Country of Origin 2015 – 2020
- 4.47 Imported Coffee Market Share of Roasted, Not Decaffeinated Volume by Country of Origin 2015 – 2020
- 4.48 Imported Coffee Market Change in Roasted, Not Decaffeinated Volume by Country of Origin 2016 – 2020
- 4.49 Imported Coffee Market Roasted, Decaffeinated Volume by Country of Origin 2015 – 2020
- 4.50 Imported Coffee Market Share of Roasted, Decaffeinated Volume by Country of Origin 2015 – 2020
- 4.51 Imported Coffee Market Change in Roasted, Decaffeinated Volume by Country of Origin 2016 – 2020
- 4.52 Exported Coffee Market All Countries and Types 1998 – 2020

TABLE OF CONTENTS

Exhibits

5. THE U.S. COFFEE MARKET BY DISTRIBUTION CHANNEL

- 5.53 U.S. Coffee Market Estimated Volume by Distribution Channel 2015 – 2025
- 5.54 U.S. Coffee Market Share of Volume by Distribution Channel 2015 – 2025
- 5.55 U.S. Coffee Market Change in Volume by Distribution Channel 2016 – 2025
- 5.56 U.S. Coffee Market Top Retailers by Number of U.S. Locations 2021

6. THE LEADING COFFEE COMPANIES AND THEIR BRANDS

- 6.57 U.S. Coffee Market Estimated Volume by Leading Manufacturer 2015 – 2021
- 6.58 U.S. Coffee Market Share of Estimated Volume by Leading Manufacturer 2015 – 2021
- 6.59 U.S. Coffee Market Change in Estimated Volume by Leading Manufacturer 2016 – 2021
- 6.60 U.S. Coffee Market Estimated Volume by Leading Brand 2015 – 2021
- 6.61 U.S. Coffee Market Share of Estimated Volume by Leading Brand 2015 – 2021
- 6.62 U.S. Coffee Market Change in Estimated Volume by Leading Brand 2016 – 2021
- 6.63 U.S. Whole Bean Coffee Market Estimated Volume by Brand 2015 – 2021
- 6.64 U.S. Whole Bean Coffee Market Share of Estimated Volume by Brand 2015 – 2021
- 6.65 U.S. Whole Bean Coffee Market Change in Estimated Volume by Brand 2016 – 2021
- 6.66 U.S. Roast/Ground Coffee Market Estimated Volume by Brand 2015 – 2021
- 6.67 U.S. Roast/Ground Coffee Market Share of Estimated Volume by Brand 2015 – 2021
- 6.68 U.S. Roast/Ground Coffee Market Change in Estimated Volume by Brand 2016 – 2021
- 6.69 U.S. Coffee Mix Market Estimated Volume by Brand 2015 – 2021
- 6.70 U.S. Coffee Mix Market Share of Estimated Volume by Brand 2015 – 2021
- 6.71 U.S. Coffee Mix Market Change in Estimated Volume by Brand 2016 – 2021
- 6.72 U.S. Instant Coffee Market Estimated Volume by Brand 2015 – 2021
- 6.73 U.S. Instant Coffee Market Share of Estimated Volume by Brand 2015 – 2021
- 6.74 U.S. Instant Coffee Market Change in Estimated Volume by Brand 2016 – 2021
- 6.75 U.S. Coffee Pod Market Estimated Volume by Brand 2015 – 2021
- 6.76 U.S. Coffee Pod Market Share of Estimated Volume by Brand 2015 – 2021
- 6.77 U.S. Coffee Pod Market Change in Estimated Volume by Brand 2016 – 2021

7. THE U.S. READY-TO-DRINK COFFEE MARKET

- 7.78 U.S. RTD Coffee Market Wholesale Dollars and Case Volume 1993 – 2025
- 7.79 U.S. RTD Coffee Market Wholesale Dollars and Case Volume Growth 1994 – 2025
- 7.80 U.S. RTD Coffee Market Per Capita Consumption 1993 – 2025
- 7.81 U.S. RTD Coffee Market Shelf-Stable vs. Chilled Volume and Growth 2011 – 2025
- 7.82 U.S. RTD Coffee Market Shelf-Stable vs. Chilled Wholesale Dollars and Growth 2011 – 2025
- 7.83 U.S. RTD Coffee Market Quarterly Volume Shares 2003 – 2020
- 7.84 Leading RTD Coffee Brands Estimated Volume 2015 – 2021
- 7.85 Leading RTD Coffee Brands Estimated Share of Volume 2015 – 2021
- 7.86 Leading RTD Coffee Brands Estimated Change in Volume 2016 – 2021
- 7.87 Leading RTD Coffee Brands Estimated Wholesale Dollars 2015 – 2021

TABLE OF CONTENTS

Exhibits

7. THE U.S. READY-TO-DRINK COFFEE MARKET (cont'd)

- 7.88 Leading RTD Coffee Brands Estimated Share of Wholesale Dollars 2015 – 2021
- 7.89 Leading RTD Coffee Brands Estimated Change in Wholesale Dollars 2016 – 2021
- 7.90 The Regional RTD Coffee Markets Wholesale Dollar Sales 1993 – 2025
- 7.91 The Regional RTD Coffee Markets Wholesale Dollar Share 1993 – 2025
- 7.92 The Regional RTD Coffee Markets Wholesale Dollar Growth 1994 – 2025
- 7.93 U.S. RTD Coffee Market Estimated Volume by Distribution Channel 2015 – 2025
- 7.94 U.S. RTD Coffee Market Share of Volume by Distribution Channel 2015 – 2025
- 7.95 U.S. RTD Coffee Market Change in Volume by Distribution Channel 2016 – 2025

8. COFFEE INDUSTRY PRICING IN THE U.S.

- 8.96 Consumer Price Index Changes for Coffee and Other Items 1995 – 2020
- 8.97 Producer Price Index Changes for Coffee and All Commodities 1995 – 2020

9. THE ORGANIC COFFEE MARKET

- 9.98 Global Organic Coffee Market Estimated Volume and Change 2002 – 2025
- 9.99 U.S. Organic Coffee Market Estimated Volume and Change 2002 – 2025
- 9.100 U.S. Organic Coffee Market Per Capita Consumption 2002 – 2025

10. U.S. COFFEE MARKET ADVERTISING EXPENDITURES

- 10.101 U.S. Coffee Market Estimated Advertising Expenditures 2000 – 2020
- 10.102 U.S. Coffee Market Expenditures by Leading Advertisers 2015 – 2020
- 10.103 U.S. Coffee Market Share of Expenditures by Leading Advertisers 2015 – 2020
- 10.104 U.S. Coffee Market Change in Expenditures by Leading Advertisers 2016 – 2020
- 10.105 U.S. Coffee Market Advertising Expenditures by Media 2015 – 2020
- 10.106 U.S. Coffee Market Share of Advertising Expenditures by Media 2015 – 2020
- 10.107 U.S. Coffee Market Change in Advertising Expenditures by Media 2016 – 2020

11. DEMOGRAPHICS OF THE U.S. COFFEE CONSUMER

- 11.108 Demographics of the Specialty Coffee Consumer 2020
- 11.109 Demographics of the Hot Specialty Coffee Consumer 2020
- 11.110 Demographics of the Iced Specialty Coffee Consumer 2020

12. THE GLOBAL COFFEE MARKET

- 12.111 Global Green Coffee Market Production Volume and Growth 1994 – 2020
- 12.112 Global Green Coffee Market Estimated Consumption by Country 2015 – 2020
- 12.113 Global Green Coffee Market Share of Consumption by Country 2015 – 2020
- 12.114 Global Green Coffee Market Change in Consumption by Country 2016 – 2020
- 12.115 Global Fairtrade Coffee Market Volume by Country 2015 – 2020
- 12.116 Global Fairtrade Coffee Market Share of Volume by Country 2015 – 2020
- 12.117 Global Fairtrade Coffee Market Change in Volume by Country 2016 – 2020

Inspire Brands, based in Atlanta, Georgia, was founded in 2018 and grew, via acquisition, to become one of the largest restaurant companies in the United States. Its involvement in the U.S. coffee market is primarily through Dunkin' (formerly Dunkin' Brands and, before that, Dunkin' Donuts), which Inspire completed the acquisition of in December 2020.

- Inspire got started following the 2018 acquisition of Buffalo Wild Wings and Rusty Taco by Arby's. Later in the year it acquired Sonic Drive-In. In 2019, it added Jimmy John's.
- By 2021, Inspire had 32,000 restaurants in 65 countries with \$27 billion in sales.
- Within these totals were 12,700 Dunkin' locations in 40 countries with \$9.4 billion in sales.
- Affiliates of Roark Capital remained the majority owners of Inspire as of 2021. Post-acquisition Dunkin' (and affiliated Baskin Robbins stores) began operating as brands within the Inspire portfolio.
- The following profile describes the Dunkin' brand's rise to become a key player in the U.S. coffee market as well as developments since becoming part of Inspire Brands.

Prior to the Inspire absorption, Dunkin' Brands Group, Inc., primarily operated a chain of donut and coffee shops under the Dunkin' name. Dunkin' Donuts, as it was originally known, was founded in Quincey, Massachusetts, in 1950 before subsequently moving its headquarters to Canton, Massachusetts. It was a powerhouse in the Northeast U.S. but has since expanded across the country.

- In March 2006, Pernod Ricard (which acquired former Dunkin' parent, Allied Domecq) sold Dunkin' Brands, Inc., to private equity firms Bain Capital, Thomas H. Lee Partners and Carlyle Group. In July 2011, Dunkin' Brands Group underwent an initial public offering (IPO), which reduced the private equity firms' combined stake from 32% to 26%. By 2012, these firms completed their exit from Dunkin' Brands Group. Dunkin' Brands began to be traded on the NASDAQ under the DNKN symbol.
- However, in 2020, Dunkin' Brands went private again after being acquired by Inspire Brands for \$8.76 billion.
- Dunkin' Brands also encompassed Baskin-Robbins "hard serve" ice cream shops, many of which are co-located in Dunkin' (Donuts) stores. (The name change from Dunkin' Donuts to Dunkin' was made in 2018.)

**U.S. COFFEE MARKET
SHARE OF CONSUMPTION BY SEGMENT
2015 – 2025(P)**

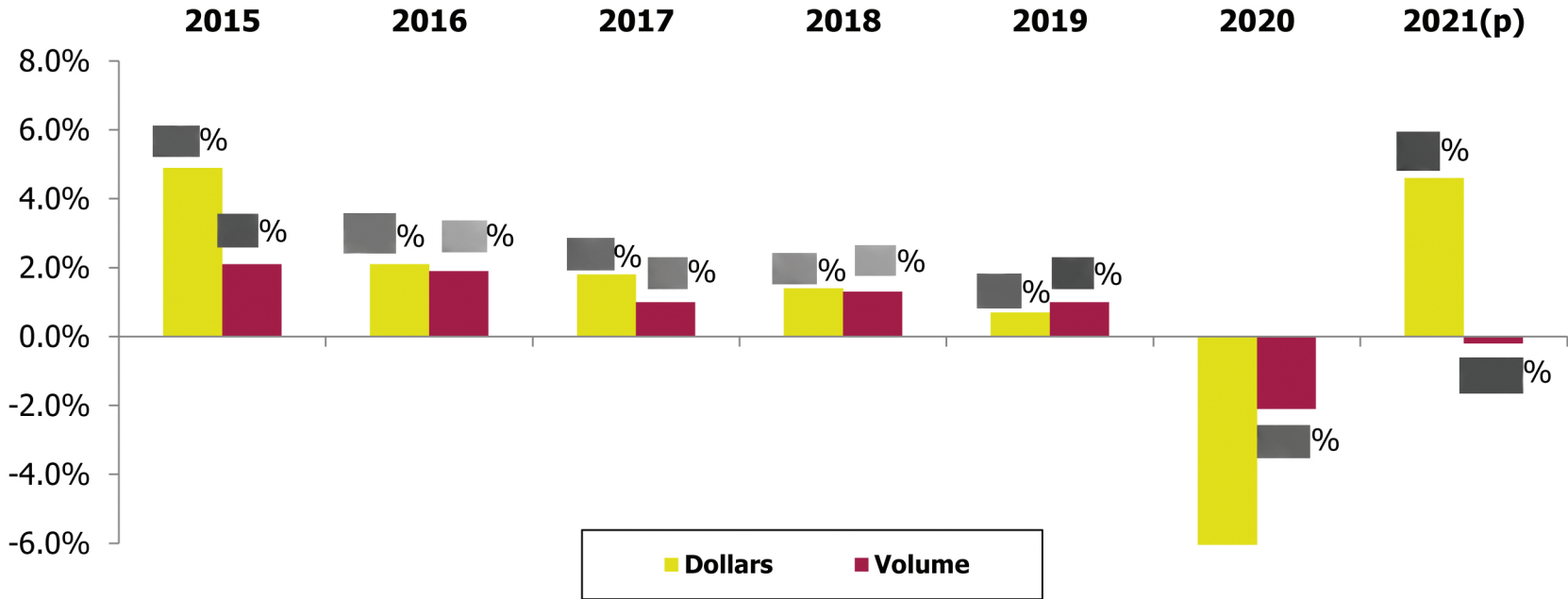
Segment	2015	2016	2017	2018	2019	2020	2021(p)	2025(P)
Roast/Ground	65%	65%	65%	65%	65%	65%	65%	65%
Pods	15%	15%	15%	15%	15%	15%	15%	15%
RTD	10%	10%	10%	10%	10%	10%	10%	10%
Whole Bean	5%	5%	5%	5%	5%	5%	5%	5%
Instant	1%	1%	1%	1%	1%	1%	1%	1%
Mixes	1%	1%	1%	1%	1%	1%	1%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%

(p) Preliminary; (P) Projected
Source: Beverage Marketing Corporation

Coffee Market Trends and the Impact of Covid-19

- Coffee volume experienced a compound annual growth rate (CAGR) of ███% between 2015 and 2020.
- In the same five-year period, retail dollar sales of coffee dipped by a CAGR of ███%.
- Covid-19 wreaked havoc on the market, particularly on on-premise channels that constitute a higher proportion of retail dollars than volume. Thus, in 2020, coffee retail sales declined by ███% in 2020 but are expected to increase by ███% in 2021.

**Coffee Retail Dollar and Volume Growth
2015 – 2021(p)**



(p) Preliminary
Source: Beverage Marketing Corporation