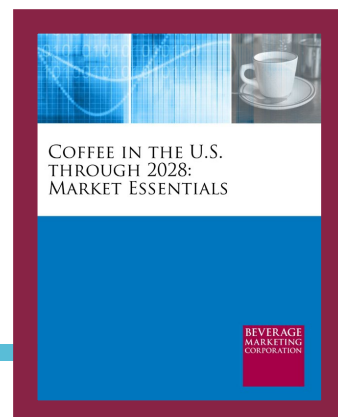


COFFEE IN THE U.S. THROUGH 2028: MARKET ESSENTIALS

2024 EDITION (Published February 2025. Data through 2023, selected preliminary 2024 figures and forecasts through 2028.) More than 100 Excel tables plus an executive summary detailing trends and comprehensive profiles of leading companies, their brands and their strategies.



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This U.S. coffee market research report from Beverage Marketing Corporation puts the U.S. market into global context and delivers data on coffee production and consumption, quarterly and annual growth, imports and exports, advertising and demographics and more. This comprehensive study looks at the performance of various sectors including roast/ground, pods, whole bean, RTD, instant and mixes, looking at segment and company/brand performance. The study also delves deeper on the ready-to-drink (RTD) coffee market looking at chilled vs shelf stable segment and brand trends and more. It also analyzes specialty coffee, coffee pods and single-cup coffee machines. Trends in the organic market and many other facets of this large yet diverse staple beverage that has moved from traditional commodity to a highly specialized market ripe for continued innovation are also examined.

The report presents the data in Excel spreadsheets, which it supplements with a concise executive summary highlighting key developments as well as a detailed discussion of the leading coffee companies. Historical, current and projected market performance is provided.

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**HAVE
QUESTIONS?**

Contact Charlene Harvey: 212-688-7640 x 250
charvey@beveragemarketing.com

**BEVERAGE
MARKETING
CORPORATION**

BEVERAGE MARKETING CORPORATION
P.O. Box 2399 | 143 Canton Road, 2nd Floor
Wintersville, OH 43953
Tel: 212-688-7640 Fax: 740-314-8639

THE ANSWERS YOU NEED

Coffee in the U.S. through 2028: 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 2024 and how did that change vs 2023? How did decaf fare vs. caffeinated?
- 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 2024?
- 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 2024? Which will gain market share to 2028? Which will lose share points?
- How will the foodservice channel 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 total 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.
- A look at sales, growth and share for key shelf stable and chilled RTD Coffee brands and the private label market. Brands covered include Frappuccino, Java Monster, STÖK, Starbucks Doubleshot Energy, Starbucks Doubleshot, Starbucks TripleShot, Dunkin' Donuts, Chameleon, La Colombe, Starbucks Cold Brew, Stumptown, Forto Energy (Coffee), Peet's Coffee, Rockstar Roasted, Blue Bottle, Starbucks Iced Latte, Illy, Kohana, Seattle's Best, Havana, Starbucks Chilled Coffee, Califia Farms, International Delight Iced Coffee and others.
- Five-year compound annual growth projections (CAGRs) for the coffee market and its sub-segments, including RTD coffee through 2028.



COFFEE IN THE U.S. THROUGH 2028: MARKET ESSENTIALS

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Coffee in the U.S. through 2028: Market Essentials

February 2025

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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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Inspire endeavored to boost the Dunkin' coffee business by moving well beyond conventional hot coffee. In 2022 and beyond, for instance, several iced coffees and other flavors proliferated.

- In summer 2022, the company presented several seasonal cold-brewed iced coffees for June and July: Brown Sugar Cream Cold Brew, Cake Batter Signature Latte, Butter Pecan Iced Coffee and Sunrise Batch Iced Coffee.
- Salted Caramel Cold Brew first appeared as a seasonal offering in spring 2022 and returned in summer 2023.
- In August 2022, Nutty Pumpkin Coffee joined Pumpkin Cream Cold Brew and Pumpkin Spice Signature Latte as the limited-time-only autumn varieties.
- Nutty Pumpkin Coffee and Pumpkin Spice Signature Latte reappeared in August 2023.
- Traditionally, Dunkin' offers seasonal coffees around the year-end holidays, including recurring ones like Peppermint Mocha Signature Latte and Toasted White Chocolate Signature Latte. In November 2022, it expanded the lineup with Cookie Batter Cold Brew. For Halloween 2024, it launched Potion Macchiato. In 2024, it introduced Holiday Cookie Signature Latte.
- Around the same time, it launched an Iced Cold Brew that it positioned as a sort of energy drink, which it made available in black as well as in a Sweet & Creamy formulation supplementing the 100% Colombian coffee with whole milk and simple syrup.
- Beyond crafting iced coffees and new flavors, Dunkin' also committed to using 100% sustainably sourced coffee by 2025 when it created its Dunkin' Drive-To Sustainability program in September 2022.
- At the end of 2024, it teamed up with pop phenomenon Sabrina Carpenter to play off her hit song "Espresso" with Sabrina's Brown Sugar Shakin' Espresso.

U.S. COFFEE MARKET
SHARE OF CONSUMPTION BY SEGMENT
2018 - 2028(P)

Segment	2018	2019	2020	2021	2022	2023	2024(p)	2028(P)
Roast/Ground	%	%	%	%	%	%	%	%
Pods	%	%	%	%	%	%	%	%
RTD	%	%	%	%	%	%	%	%
Whole Bean	%	%	%	%	%	%	%	%
Instant	%	%	%	%	%	%	%	%
Mixes	%	%	%	%	%	%	%	%
TOTAL	%	%	%	%	%	%	%	%

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

