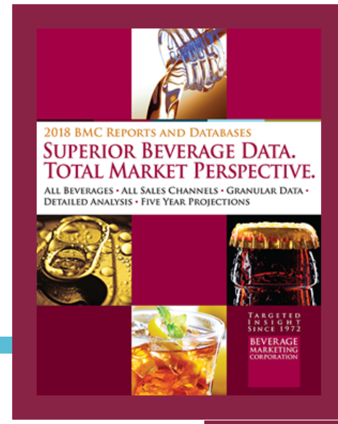
COLD BREW COFFEE IN THE U.S.

2018 EDITION (Published September 2018. Data through 2017. Market projections through 2022.) More than 40 pages, with extensive text analysis, graphs, charts and tables



This executive briefing report shines a spotlight on the cold brew coffee market, providing insight on trends in packaging and formulations. It also provides sales and volume data for the leading brands. Part of Beverage Marketing's Focus Report series, this report offers data and insight examining the burgeoning cold brew sub-segment of the ready-to-drink (RTD) coffee market. The evolution of this fast-growing market is discussed in detail, with data to back up the insights provided. The report also projects how big the segment will become in five years.

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INSIDE:

HAVE QUESTIONS?

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The answers you need

The *Cold Brew Coffee in the U.S.* report provides 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 include:

- What are the latest trends behind cold brew coffee's performance in the U.S. market?
- How many gallons of cold brew coffee did U.S. residents consume in 2017?
- How has cold brew coffee fared in comparison with the broader RTD coffee category? How, in turn, does this compare with the even broader coffee category as a whole?

This ready-to-drink coffee research report features

Cold Brew Coffee in the U.S. offers an in-depth look at the category, companies and brands shaping the cold brew coffee market and the drivers impacting current and anticipated growth through 2022.

It provides sales and volume statistics including total-market wholesale dollar sales and volume data. Through a combination of discussion backed by Beverage Marketing's reliable, all-sales-channel-inclusive data, users get a thorough understanding of all facets of the cold brew coffee market including:

- Discussions of the cold brew coffee market, as well as volume and dollars, as well as the segment's role in the broader RTD coffee category.
- 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.
- Five-year projections for the total coffee and overall RTD coffee market as well as cold brew coffee segment in particular.

Cold Brew Coffee in the U.S.

September 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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Summary

For two decades, an alliance between PepsiCo and Starbucks called the North American Coffee Partnership has enjoyed nearly unchallenged hegemony in the fast-growing ready-to-drink coffee business, starting with a bottled Frappuccino and extending into numerous adjacent categories, from DoubleShot canned espresso to plain old iced coffee. Remarkably, PepsiCo archrival Coca-Cola mustered only the weakest of challenges, say, by purchasing a Planet Java brand that had barely established a presence in its core New York market, then partnering with Italy's Illy to offer a RTD line that proved a bit too arcane for any kind of broad success.

- Hansen Beverage (now Monster Beverage) threw a brief scare into the alliance with the launch of its more masculine-tilted Java Monster coffee/energy hybrid, but the duo responded with DoubleShot + Energy. Nevertheless, Java Monster remains a significant franchise for Monster. (Another entry, Rockstar Roasted, did not prove as durable. Similarly, HiBall dropped its energy drink/cold brew coffee hybrid after it was acquired by Anheuser-Busch InBev.)
- But the category suddenly exploded. Chalk most of it up to the vogue for coffee that is cold-brewed, a process in which cold water is laboriously dripped over coffee beans for a period spanning 10 hours or more to yield a coffee that offers a rounded flavor remarkably free of bitterness. Starting in independent coffee shops, the coffee style has broadened to a vast flock of concentrated and RTD entries, both from independent roasters and mass marketers, and got a decisive boost of awareness when Starbucks rolled the style out in its stores nationally two years ago, followed by Dunkin' Donuts and other chains.
- Pepsi/Starbucks ventured a RTD cold-brew a few years ago, suffered some technical glitches, but by now have rolled it out to most parts of the country.
- As a key challenger to PepsiCo/Starbucks one must first start not with Coca-Cola, but with Joh. A. Benckiser (JAB), the European-based coffee conglomerate that has been wielding a war chest to assemble a significant portfolio of above-premium brands with which to challenge Starbucks' hegemony. Built mainly around some supermarket ground-coffee brands, JAB has acquired such chains as Peet's Coffee & Tea and Caribou Coffee, as well as third-wave roasters Stumptown, of Portland, Oregon, and Intelligentsia of Chicago (via a deal for majority control).
- It also scarfed up pod king Keurig Green Mountain for good measure (and moved quickly to scrap Keurig's Keurig Kold cold-beverage system). With Starbucks stepping up its tea presence, JAB appears to have responded by allying with the independent Chicago-based Argo Tea.

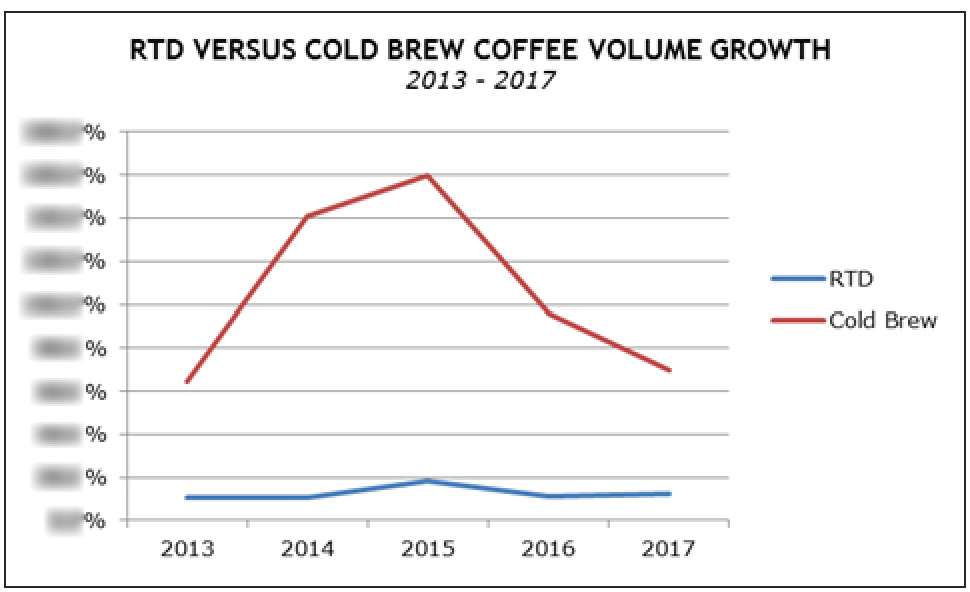
Exhibit 13

LEADING COLD BREW COFFEE* BRANDS
CHANGE IN VOLUME
2014 – 2017

Brand	2013/14	2014/15	2015/16	2016/17
Califia Farms	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Stok	--	--	[redacted]%	[redacted]%
High Brew	--	[redacted]%	[redacted]%	[redacted]%
Stumptown	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Chameleon	[redacted]%	[redacted]%	[redacted]%	[redacted]%
La Colombe	--	--	--	--
Blue Bottle	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Kohana	--	--	[redacted]%	[redacted]%
Subtotal	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
All Other	[redacted]%	[redacted]%	[redacted]%	[redacted]%
TOTAL	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**

** Packaged only, all formats, including concentrate, shelf-stable and chilled*

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation