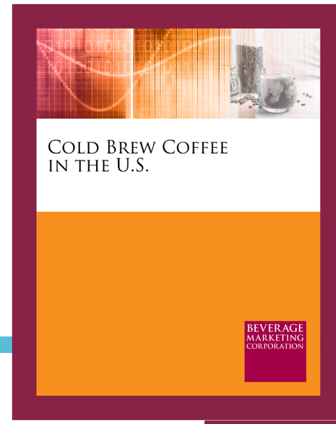
Cold Brew Coffee in the U.S.

2020 Edition (Published April 2020. Data through 2019. Market projections through 2024.) More than 50 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 and discusses the impact of the coronavirus pandemic.

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Inside:

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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 2019?
- 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 2024.

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. Coverage includes Califia Farms, Stumptown, STōK, High Brew, Chameleon, La Colombe, Blue Bottle, Kohana and more.
- Five-year projections for the total coffee and overall RTD coffee market as well as cold brew coffee segment in particular.

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BEVERAGE MARKETING CORPORATION

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April 2020

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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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What exactly is cold-brewed coffee?

- Initially popularized by companies like San Francisco's Blue Bottle (which has established several outposts in New York), this is a process where iced coffee is brewed without heat, through the laborious passage of water over cold beans via an apparatus (on view in Blue Bottle's Williamsburg, Brooklyn, store) that can resemble a giant chemistry set.
- The cold brewing process can take 20 hours or longer. The result is an uncommonly full, rounded taste almost completely lacking in bitterness, although some skeptics detect a less than complex flavor profile. Still, to some coffee drinkers, that flavor profile comes as a complete revelation of what coffee can be. Possibly more pertinently, since cold-brew is delicious consumed black, without milk or sugar, it offers a zero-calorie energizer, potentially creating a new layer of competition for conventional energy drinks whose consumers may have begun to have qualms about their high sugar content or artificial ingredients.
- A further fillip on the segment is the rapid expansion of on-draft versions of cold-brewed coffee, including those using nitrogen to confer a frothy head, Guinness-style, as well as the increasing number of entries that seek to replicate that experience in a package, including intriguing entries from La Colombe, Rise Coffee and Califia Farms. As with craft beer and kombucha, this theatrical on-premise prong offers the promise of weaving cold-brew even more tightly into consumers' imaginations and routines.
- As discussed below, two key questions confronting the segment are whether the cold-brew concept can be made to resonate with a broad-enough array of consumers, and whether it is scalable, given its exacting production requirements and the fact that many players still offer refrigerated rather than shelf-stable products. The country's most established high-velocity beer and soda distribution systems do not have refrigerated fleets to handle products such as these.
- An ancillary question is whether to go with concentrated multiserve bottles (which dominated in the early days) versus single-serve RTD versions, which have been proliferating and offer higher velocity potential. All these efforts are being explored in the market, at the risk, of course, of confusing consumers (and retailers) who already have a high learning curve to climb. In the past year or two, the momentum seems to have shifted to the RTD side.
- There is another more pressing concern: in recent months, the level of promotional activity behind single-serve entries is believed to have accelerated. On the one hand, broad acceptance of cold-brew will not occur if prices remain in the $4–5 range, but on the other hand, some of the two for $4 and even three for $5 deals seem to be eroding both the premium nature and the profitability of the segment. This is an issue that bears watching, particularly as strategic players, who are less disciplined on price, increase their presence in the segment.

Exhibit 13

LEADING COLD BREW COFFEE* BRANDS

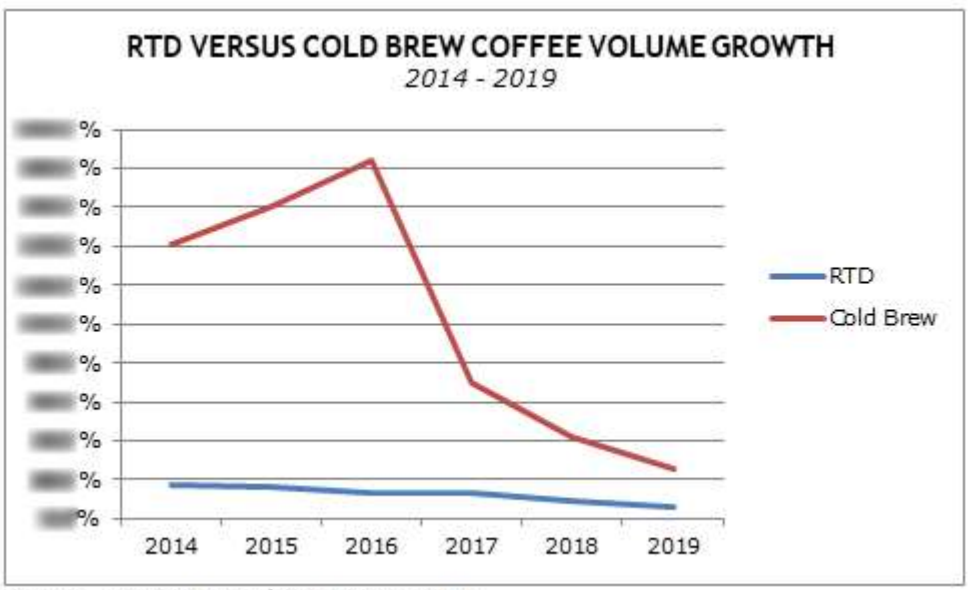
CHANGE IN VOLUME

2015 – 2019

Brand	2014/15	2015/16	2016/17	2017/18	2018/19
STōK	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Califia Farms	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
High Brew	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Starbucks Cold Brew	[redacted]	[redacted]	[redacted]%	[redacted]%	[redacted]%
Chameleon	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
La Colombe	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]%
Stumptown	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Peet's Cold Brew	[redacted]	[redacted]	[redacted]	[redacted]%	[redacted]%
Kohana	[redacted]	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Blue Bottle	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
Subtotal	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**
Private Label	[redacted]	[redacted]	[redacted]%	[redacted]%	[redacted]%
All Other	[redacted]%	[redacted]%	[redacted]%	[redacted]%	[redacted]%
TOTAL	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**	**[redacted]%**

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

Source: Beverage Marketing Corporation



Source: Beverage Marketing Corporation