

Single-Cup Brew Beverage Products in the U.S.: Coffee Pods and Beyond

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Abstracts

The Keurig K-Cup brewer from Green Mountain Coffee Roasters (GMCR) revolutionized the single-serve coffee market, which posted a compound annual growth rate of over 75% between 2007 and 2012 in tracked mass-market channels. Total U.S. retail coffee market dollar sales grew 10% in 2012 thanks to a dramatic 82% jump in the single-cup brew segment, which reached \$1.8 billion in 2012.

Proven market performance and the expiration of an important K-Cup patent in September 2012 has led to a new round of marketplace competition and opportunity, motivating long-standing category participants to step up their competitive strategies. An important feature of this competition has been an influx of private label and unlicensed beverage pods that work in Keurig K-Cup brewers.

New, more sophisticated and specialized machine technology for single-cup brewers keeps elevating the quality of coffee made at home, while single-serve beverage manufacturers and marketers continue to broaden the array of beverages specifically designed for these machines, increasing the range of successful products, brand entrants, and satisfied consumers. Although coffee beverages still predominate for single-serve brewers, other beverages including tea, cocoa and chocolate, hot and cold fruit drinks, and specialty wellness beverages are increasingly available.

Overall, several factors will continue to spur the growth of the single-cup brew beverage market, including a nation of dedicated and increasingly discerning coffee drinkers; consumer desire to recreate coffee shop quality at home; continued adoption of single-serve brewers in offices and hotels; innovations in brewer technology supporting enhanced beverage quality; a large selection of brewers, many of which are aggressively marketed and attractively priced; the popularity of single-serve brewers as

a hot kitchen gadget, well suited for holiday gift giving; a wide selection of single-serve beverage options that continues to expand; and the recent increase in published reports of the health benefits associated with coffee consumption.

Single-Cup Brew Beverage Products in the U.S. spotlights the dynamic single-serve retail beverage market, featuring proprietary Packaged Facts consumer survey data to identify the types of single-cup brew beverages used, when and where they are consumed, and where they were purchased.

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Green Mountain Coffee Roasters, Inc. (GMCR)

J.M. Smucker

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