

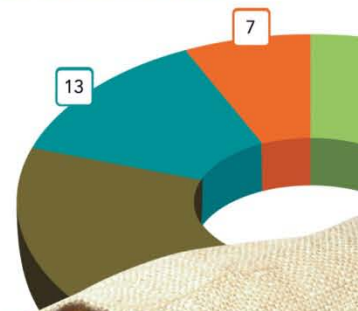


# US Snapshot

**Bill Murray**  
President and CEO  
National Coffee Association USA

**International Coffee Organization  
September 2014**

**nca**  
NATIONAL COFFEE ASSOCIATION USA EST. 1911



# US Snapshot

- The NCA
- The US Consumer Market
  - National Coffee Drinking Trends
- Government and Scientific Affairs
- What's Ahead for NCA





# What is the NCA?

- Trade association for the US coffee industry
  - Represents over 90% of all US coffee commerce
  - Serves all industry segments
- Provider of cross-industry, pre-branded professional services
  - Government Affairs
  - Scientific Affairs
  - Communications and Public Relations
  - Advocacy and Issues Management
  - Market Research
  - Education
- Core Purpose: To advocate on behalf of the US coffee industry within the context of the world coffee community

# National Coffee Drinking Trends

- Conducted since 1950
- Industry standard tracking study
- Measures US coffee consumption habits, attitudes and demographics
- Anchor for expanded *NCA Market Research Series*
  - Breakout reports: single-cup segment, ethnicity, etc.
  - Monthly Industry Sizing Briefs
  - Category Tracking Studies
  - Consumer Trend Insights



# Total Consumption

- Total consumption remains even, but strong
- Slight easing in more frequent consumption

Frequency	2014	2013	2012
Past Day	61%	63%	64%
Past Week	73%	75%	73%
Past Year	79%	83%	78%

Study Margin of Error  $\pm 1.87\%$

# Consumption by Type

- However, consumption patterns shifting toward GCB

Past-Week Consumption (%)

Frequency	2014	2013	2012
Total Coffee	73	75	73
» Traditional - Not Gourmet	47	48	46
» Gourmet Coffee Beverages (GCB)	50	47	44
› Traditional - Gourmet	27	26	26
› Espresso-Based Beverages	39	33	31



# Consumption by Type/Age

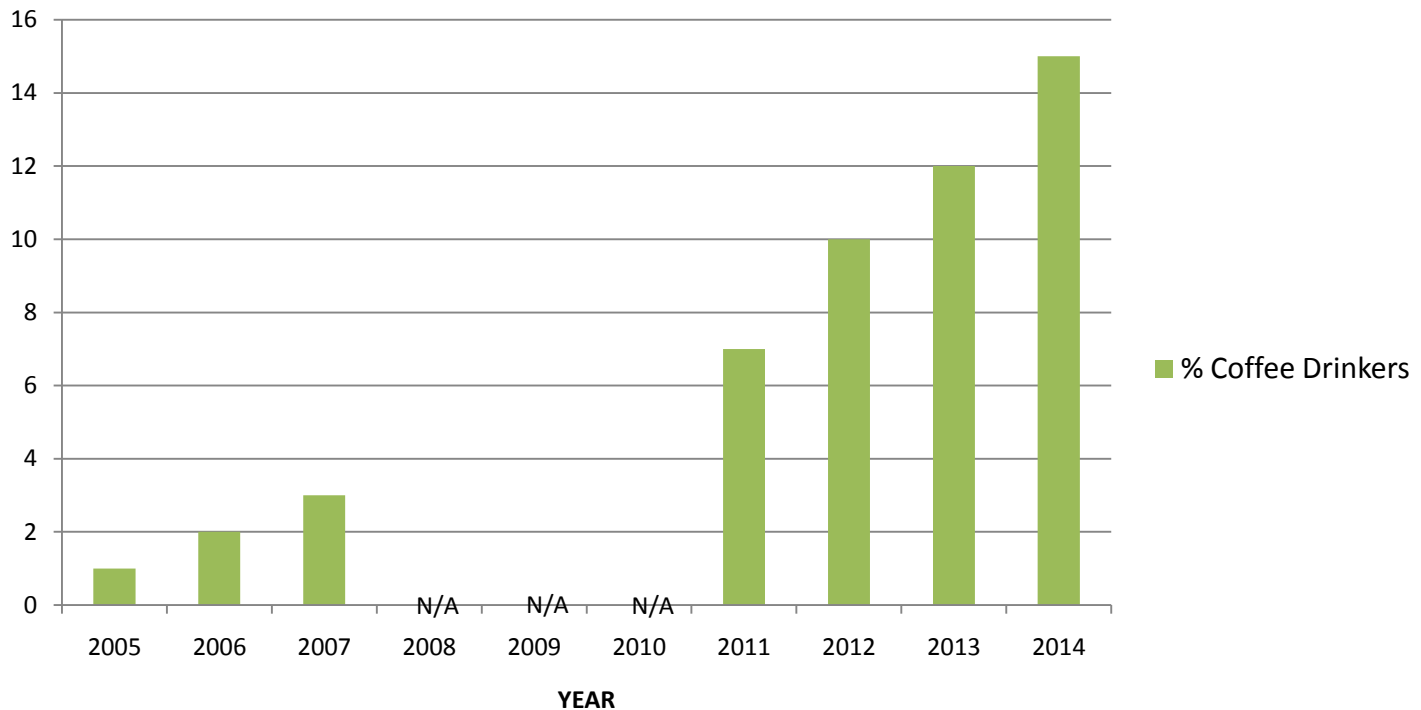
- GCB Consumption also trending younger & increasing

Past-Week Total Coffee Consumption (%)

Year	2014				2013				2012			
Age	18-24	25-39	40-59	60+	18-24	25-39	40-59	60+	18-24	25-39	40-59	60+
Total Coffee	65	75	75	73	57	75	80	84	61	73	74	79
» Traditional - Not Gourmet	40	44	49	53	31	45	53	59	38	39	48	55
» Gourmet Coffee Beverages (GCB)	54	60	49	35	48	53	47	36	44	57	43	33
› Traditional - Gourmet	22	34	27	21	21	26	28	26	19	32	27	22
› Espresso-Based Beverages	46	52	37	22	38	42	33	17	35	46	29	15

# Single-Cup Segment

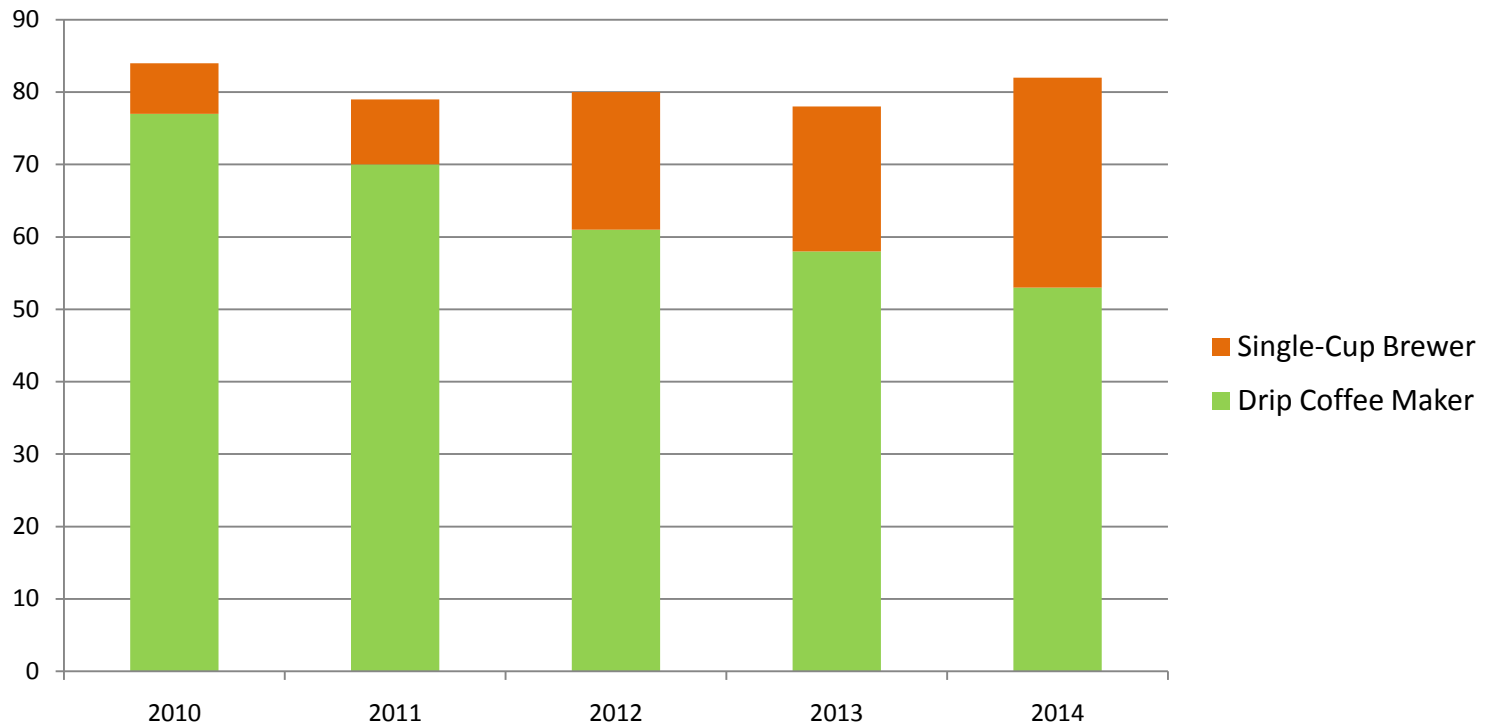
- Ownership of Single-Cup Brewer





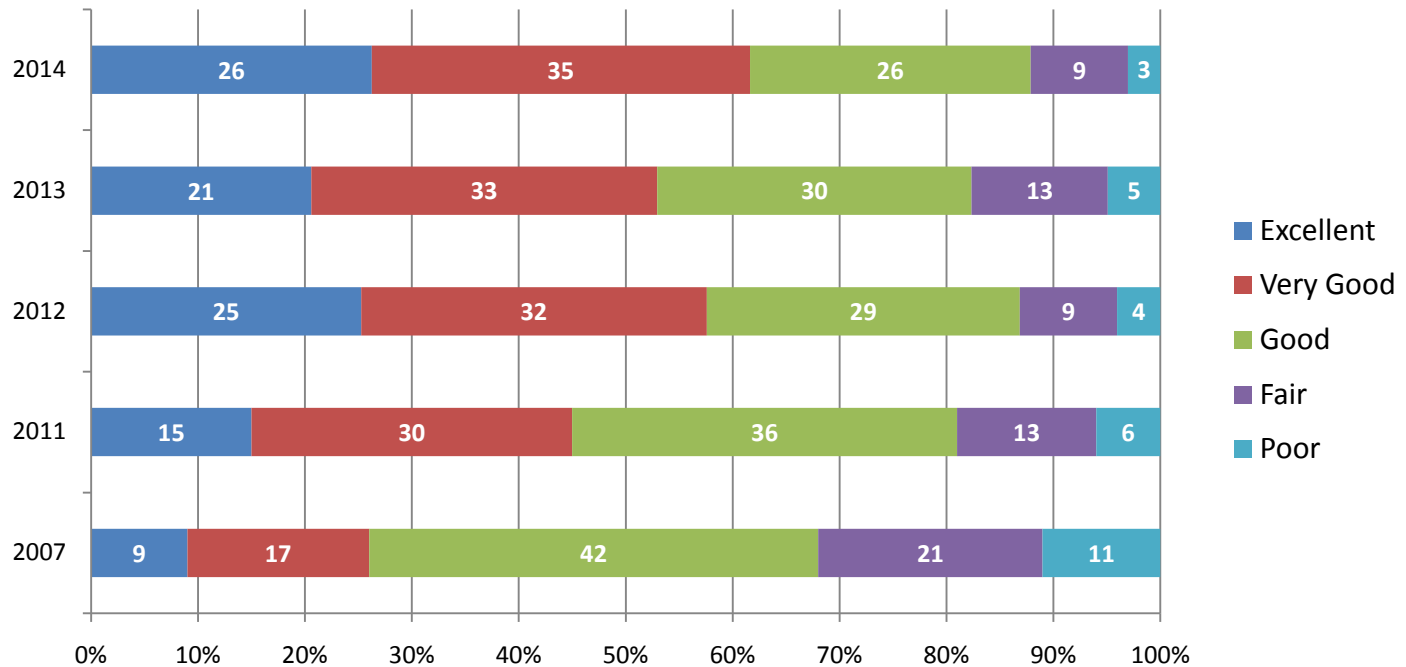
# Single-Cup Segment

- Preparation Preferences



# Single-Cup Segment

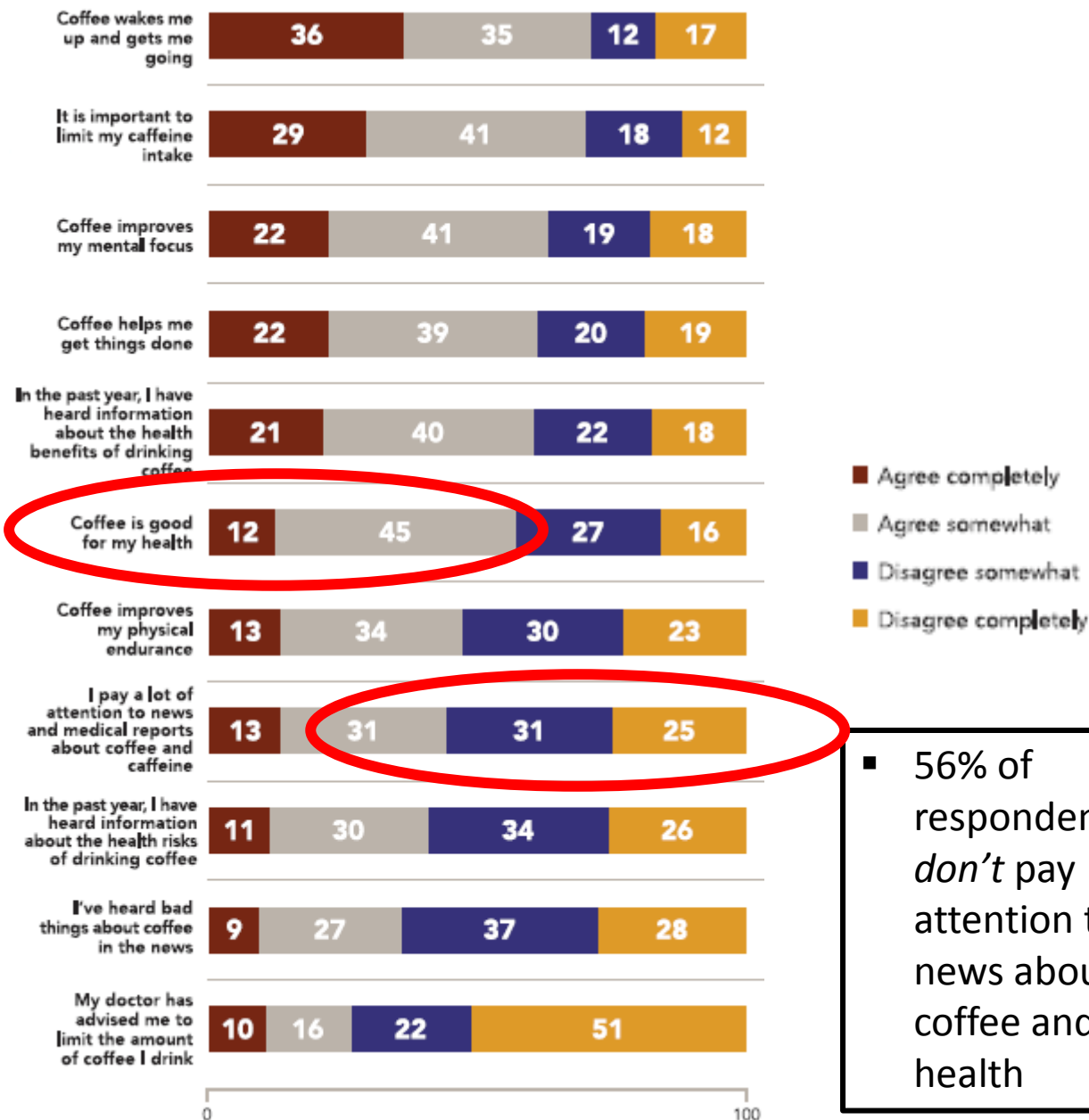
- Quality Impressions



# Coffee Equities

- Opinion Statements

- 57% of respondents feel that “coffee is good for my health”

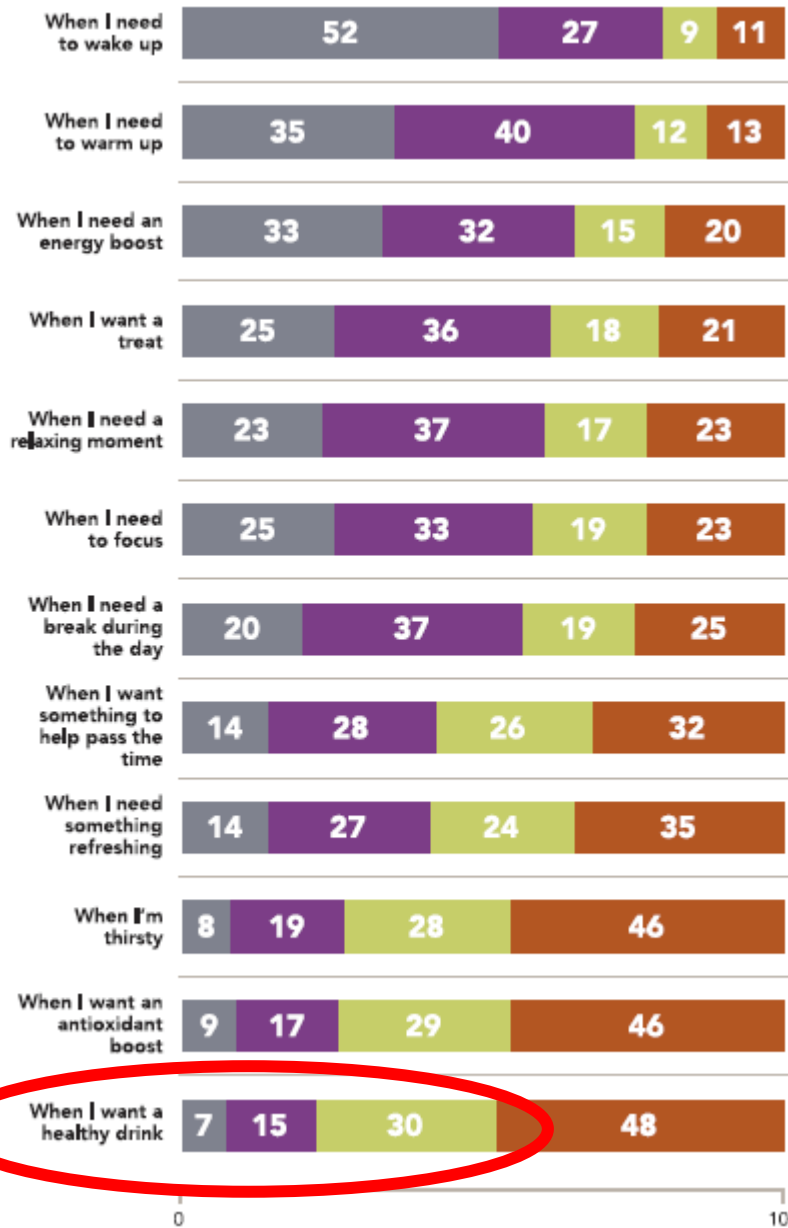


- 56% of respondents *don't* pay attention to news about coffee and health



# Coffee Equities

- Reasons for Drinking Coffee



■ Very often drink coffee for this reason  
 ■ Sometimes drink coffee for this reason  
 ■ Rarely drink coffee for this reason  
 ■ Never drink coffee for this reason

■ ...and although 57% of respondents feel that “coffee is good for my health” only 22% drink coffee “when they want a healthy drink.”





# Government Affairs

- United States
  - Food Safety Modernization Act (FSMA)
    - Intentional Adulteration of Food
    - Sanitary Transportation
  - FDA Food Labeling Proposals
    - Reference Amounts Customarily Consumed (RACC)
    - Nutrition Facts Panel
- Non US Interests
  - European Union (i.e. CONTAM)
  - Canada (Safe Food For Canadians Act Import Regulations (SFCA))



# Scientific Affairs

- Scientific Advisory Group
  - Tracking and analysis of all coffee, & health research
  - Advice on science-centric legal and regulatory issues
  - US anchor for global coffee scientific community
  - Funding of worthy scientific research
- NCA/SAG Scientific Database
  - Research Feed from ISIC
- Health Messaging & Delivery



# What's Ahead?

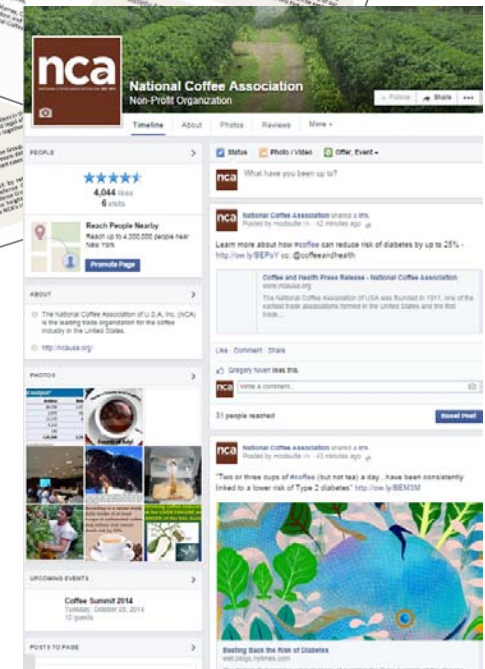
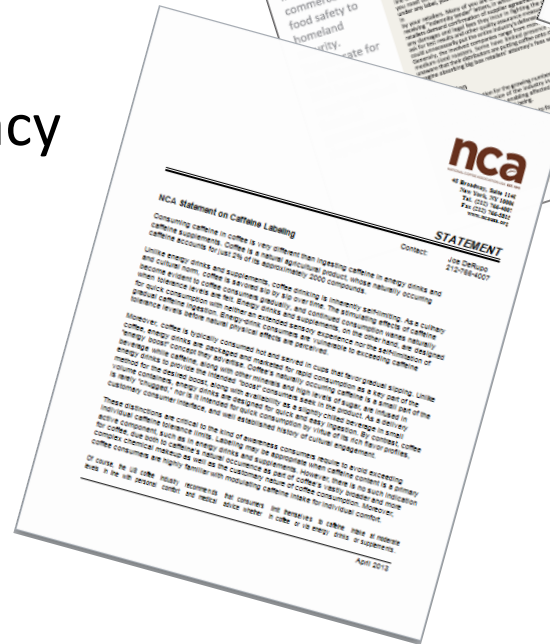


nca



# Communications

- Member Alerts
- Government Affairs Bulletins
- Scientific Affairs Updates
- Social Media
- Messaging & Advocacy





# Market Research

- 2014 Single-Cup Report
- Interactive Data Retrieval
- Industry Sizing Briefs



# Sustainability







# US Snapshot

**Bill Murray**

President and CEO  
National Coffee Association USA  
[WMMurray@ncausa.org](mailto:WMMurray@ncausa.org)

**International Coffee Organization  
September 2014**

**nca**  
NATIONAL COFFEE ASSOCIATION USA EST. 1911

