

coffee dinner & summit

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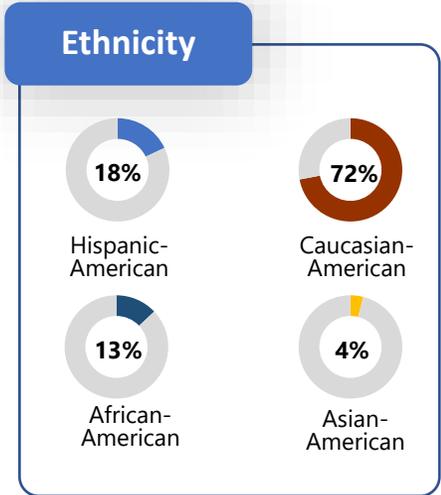
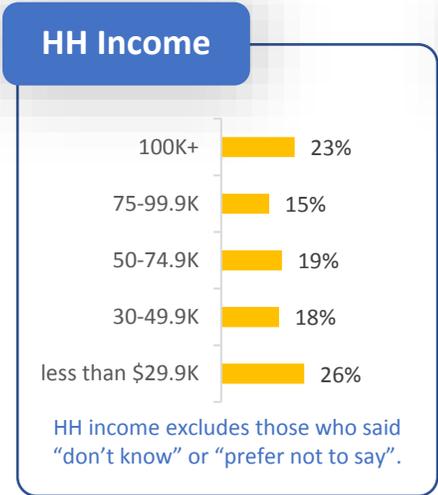
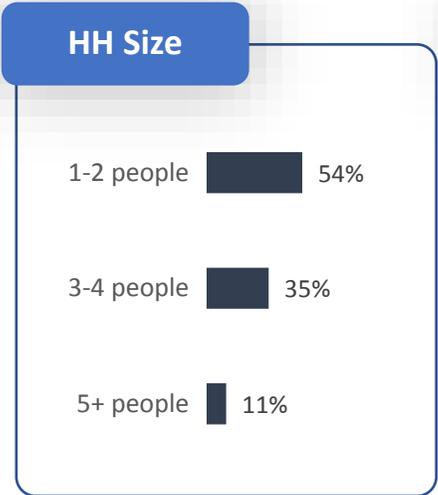
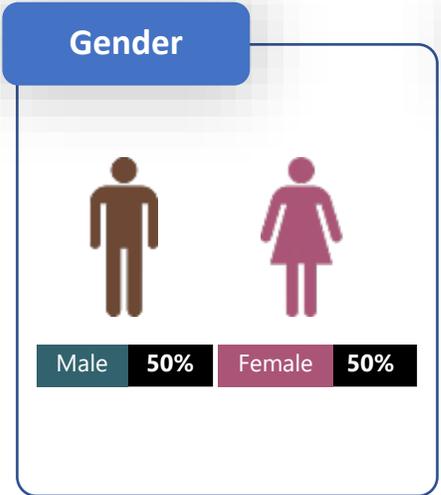
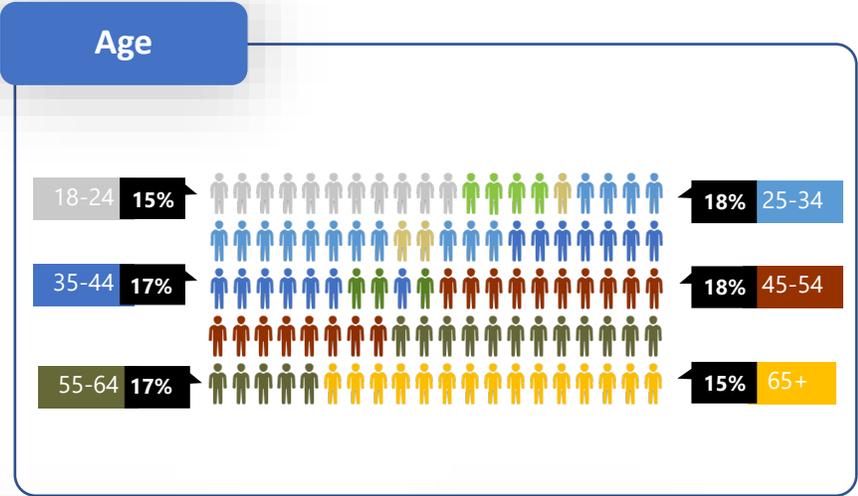
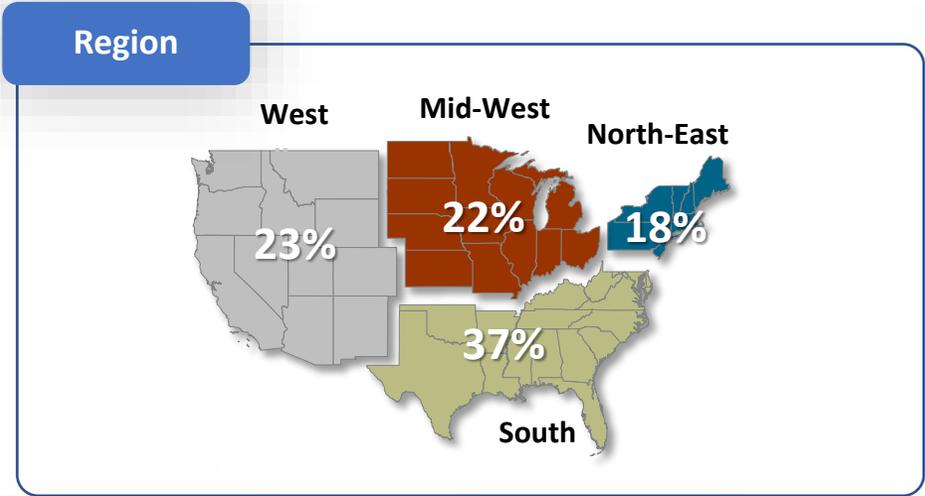
The U.S. Coffee Drinker

- Behaviors, Cautions, and Opportunities

U.S. Coffee Drinkers: The NCA Survey

Sampling 1,533 Americans
January, 2023

- The weighted sample reflects the American population 18+, with respect to age, gender, region and ethnicity.
- All respondents drank a beverage other than tap water past-day





The U.S. Coffee Drinker



Behaviors

Cautions

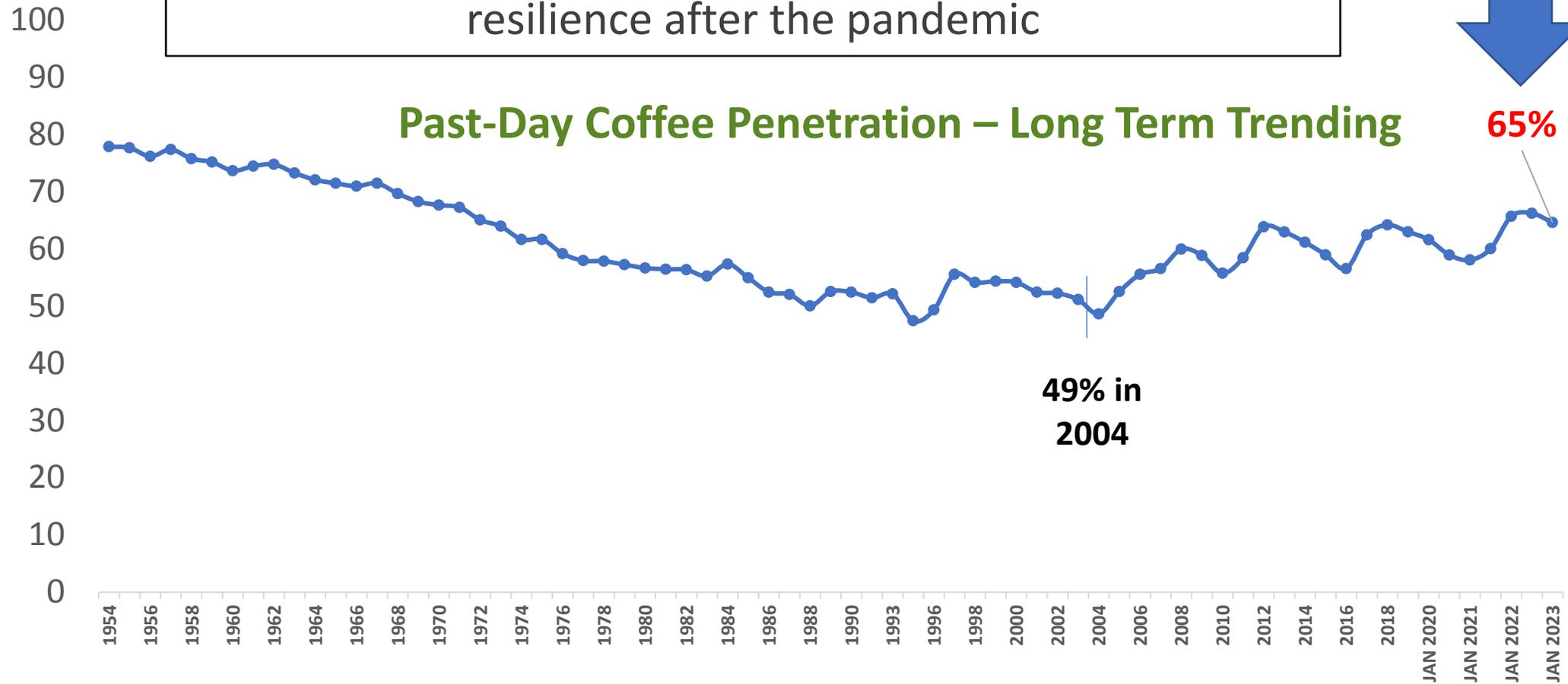
Opportunities



Behaviors

Two-thirds of Americans drank at least one cup of coffee “yesterday.” Coffee drinking remains strong – and shows resilience after the pandemic

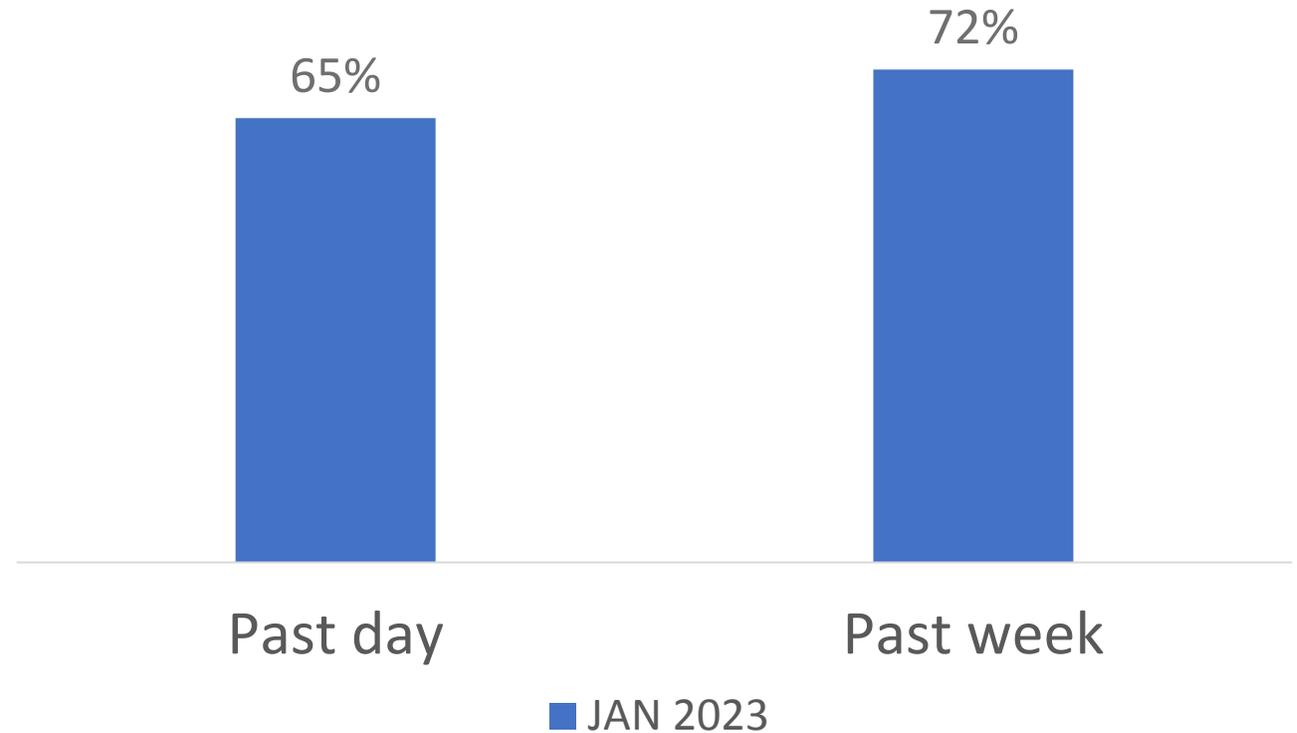
Up 7% Since January 2021



Behaviors

In January 2023, 65% of Americans drank at least one cup of coffee within the past day and almost three-quarters (72%) drank a cup in the last week.

Penetration of Coffee – Past-Day & Week



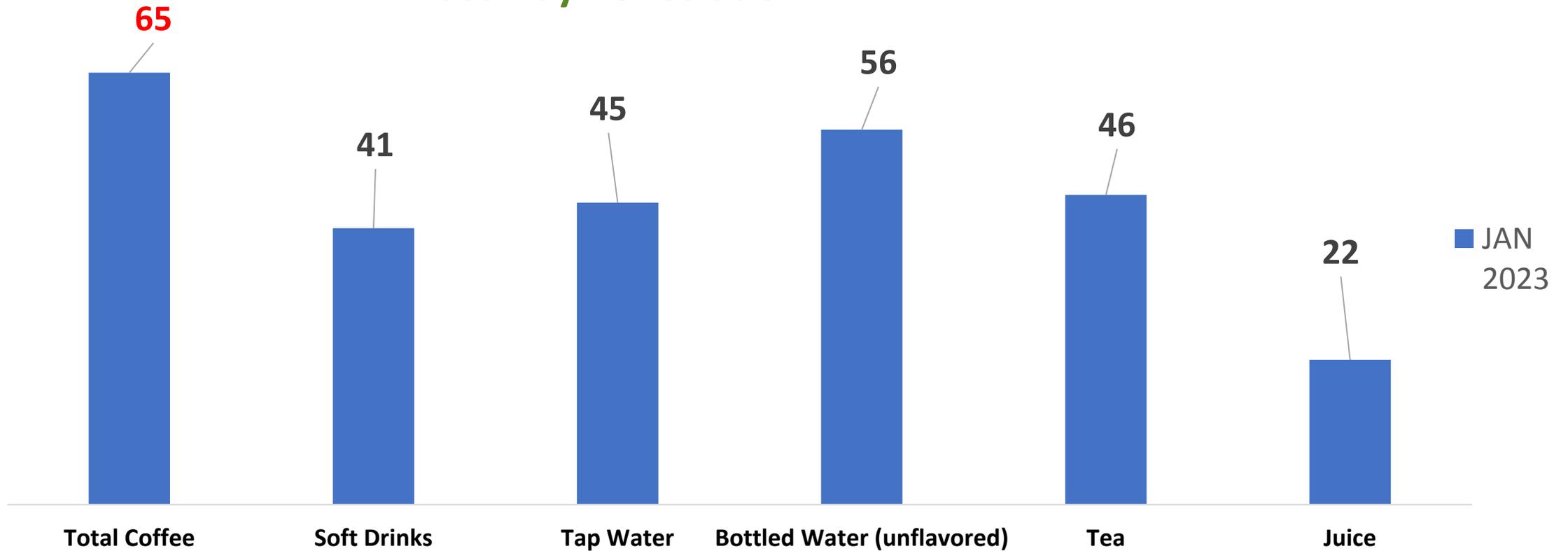
Behaviors



O café é o rei!

More Americans drink coffee each day than any other beverage, including tap water

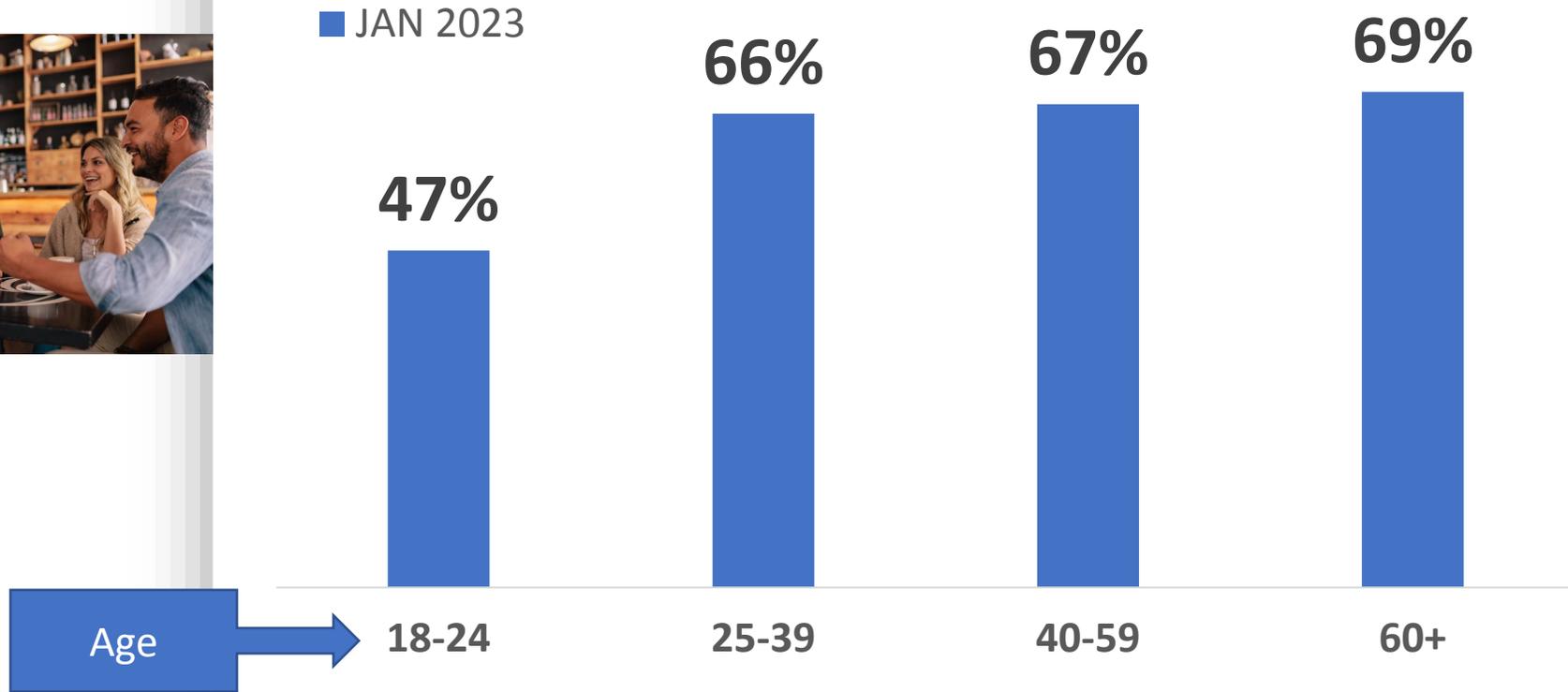
Past-Day Penetration



As Americans grow older, we drink more coffee...

Behaviors

Past-Day Penetration of Coffee By Age

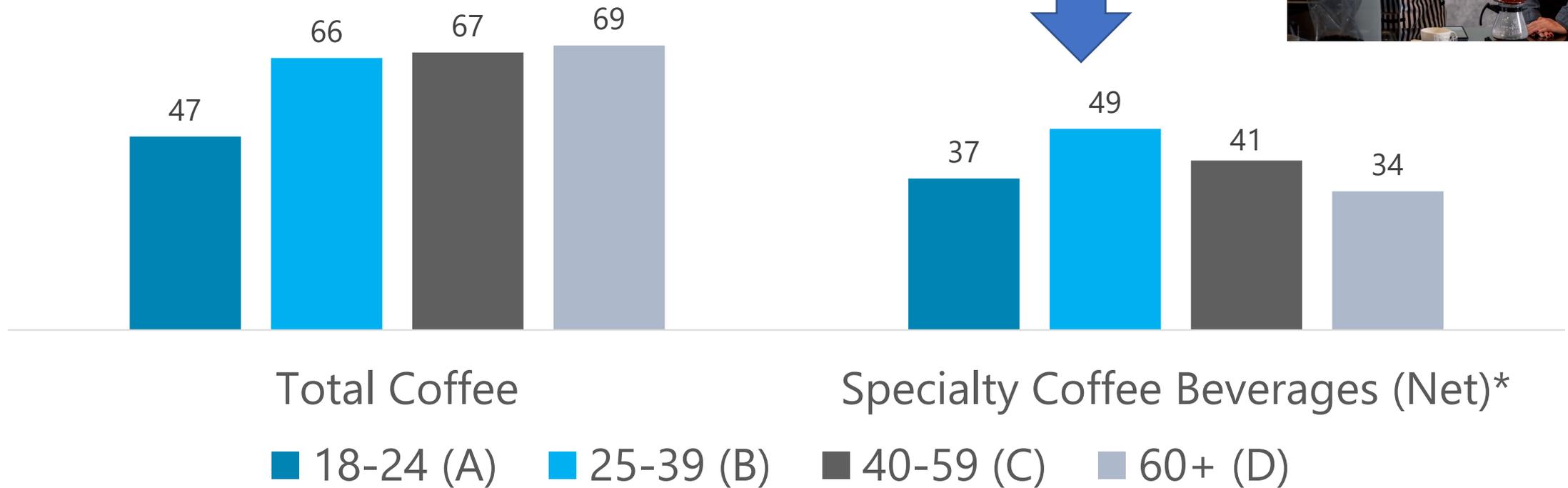


Behaviors

Older and younger coffee drinkers have different drink preferences

Past-Day Penetration of Coffee Types by Age

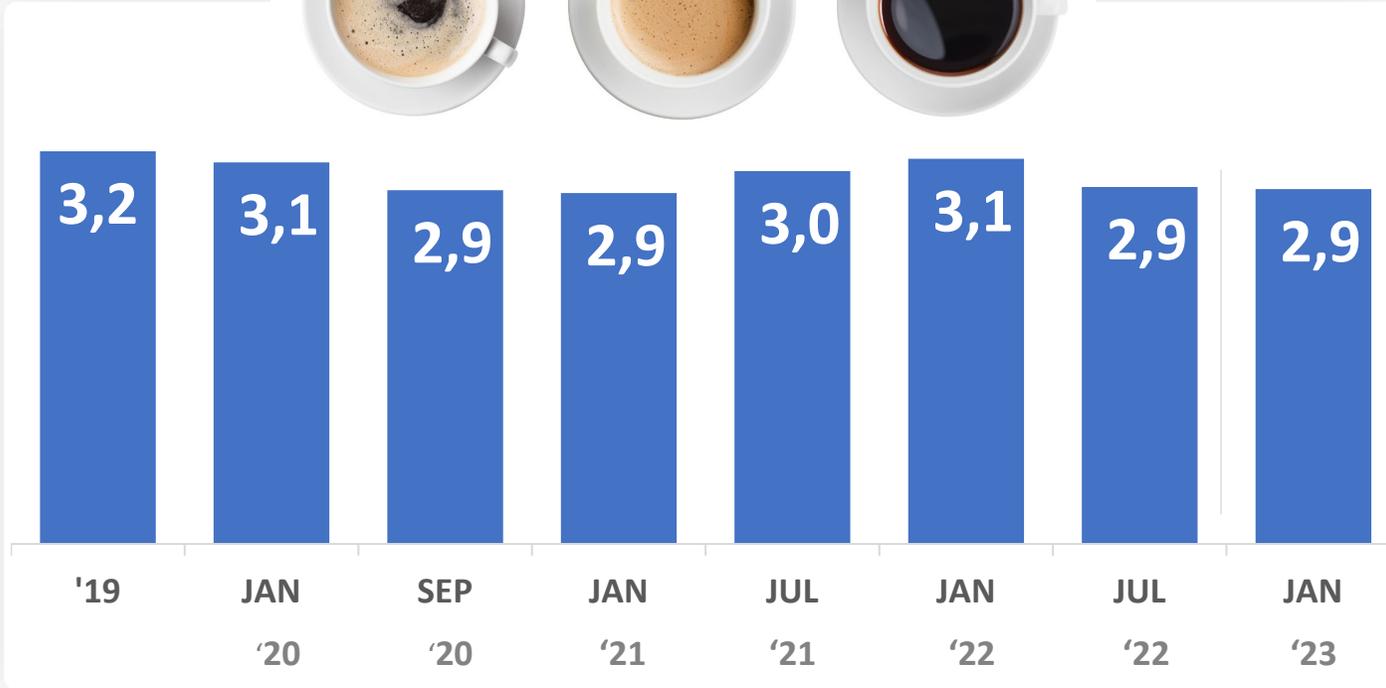
Younger coffee drinkers are driving the "specialty" coffee trend



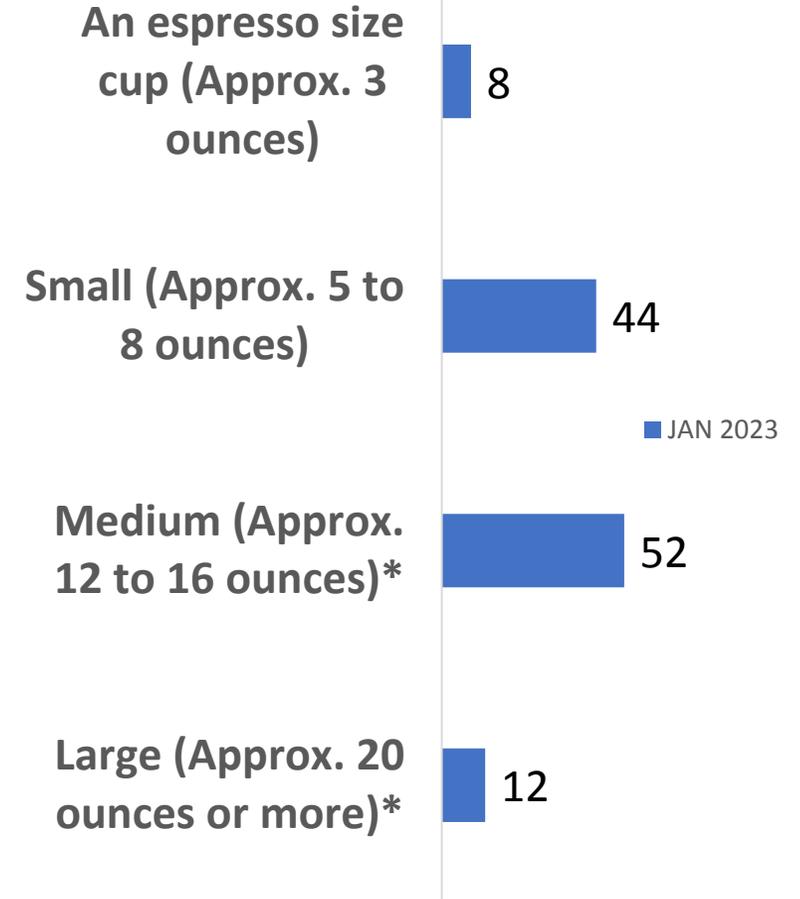
American coffee drinkers drink just under 3 cups a day

Behaviors

Number of Cups Per Day – Past-Day Size of Cups



Percentage Drinking...

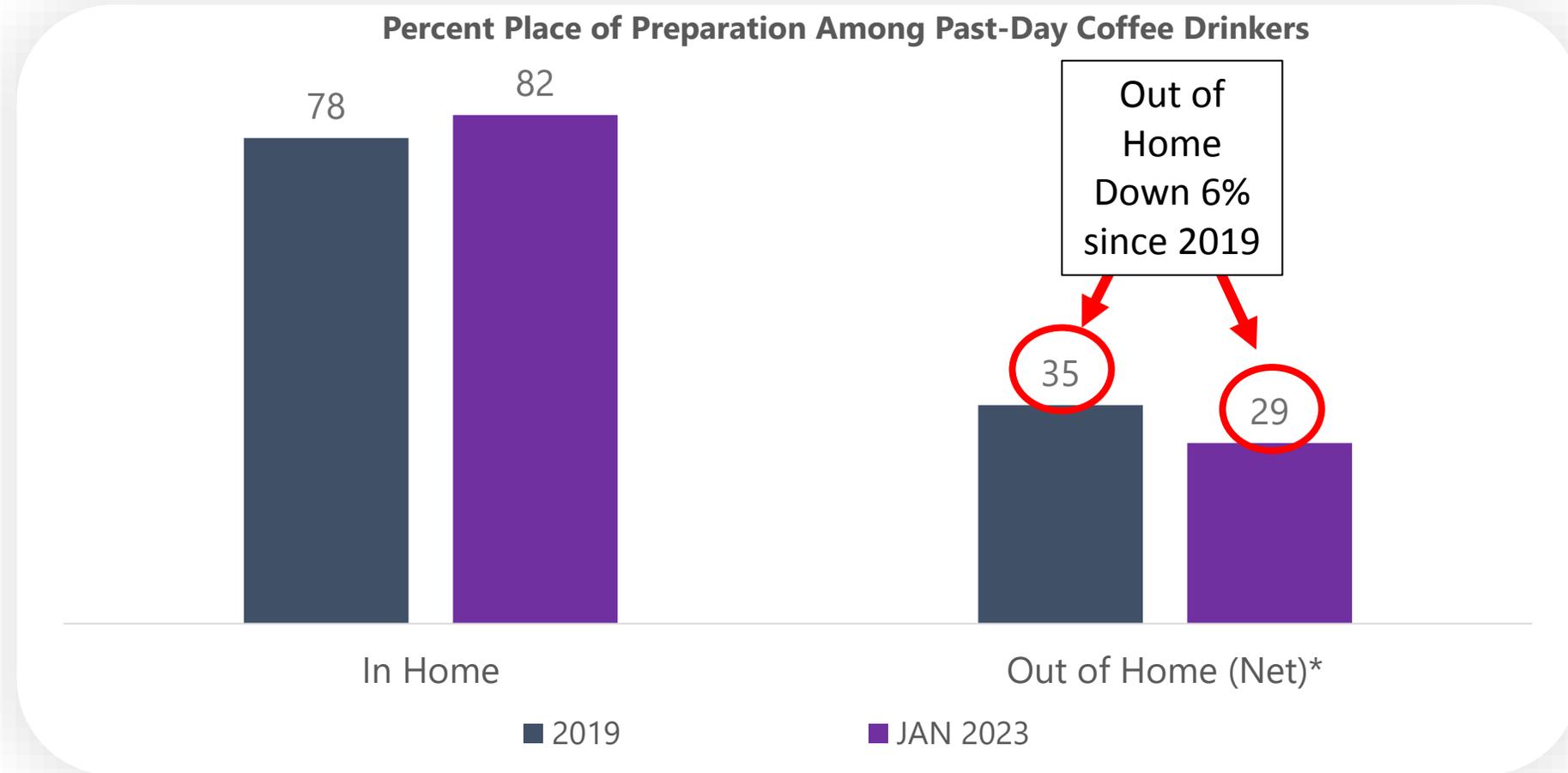


Behaviors

Americans predominantly prepare coffee at home, with just under one third drinking coffee prepared outside the home.

The out of home segment has not fully returned to pre-pandemic levels.

Past-Day Coffee Place of Preparation – Total Coffee

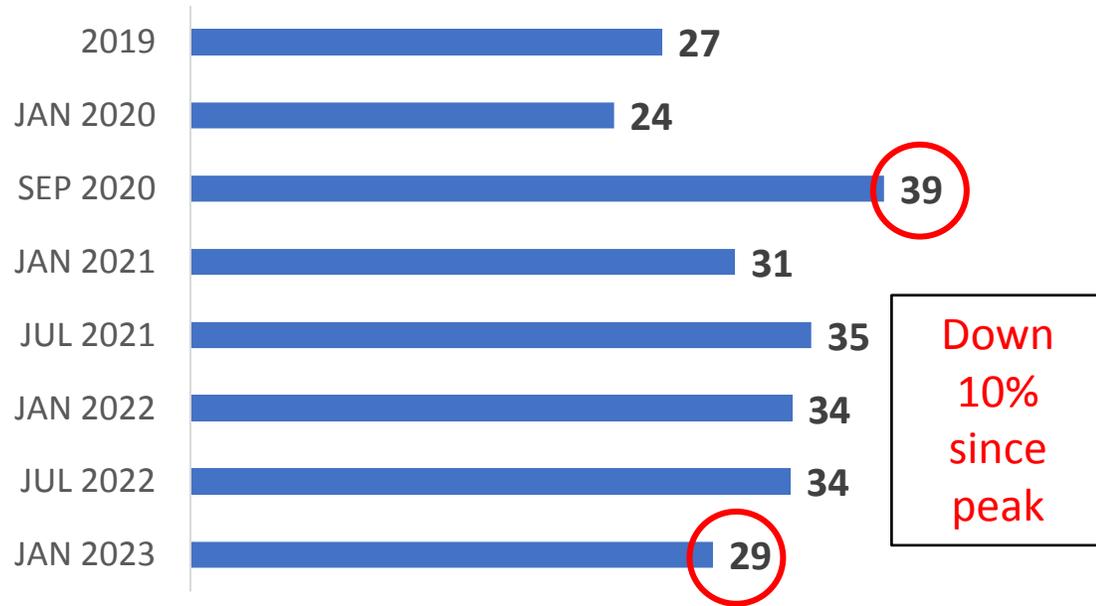


Behaviors

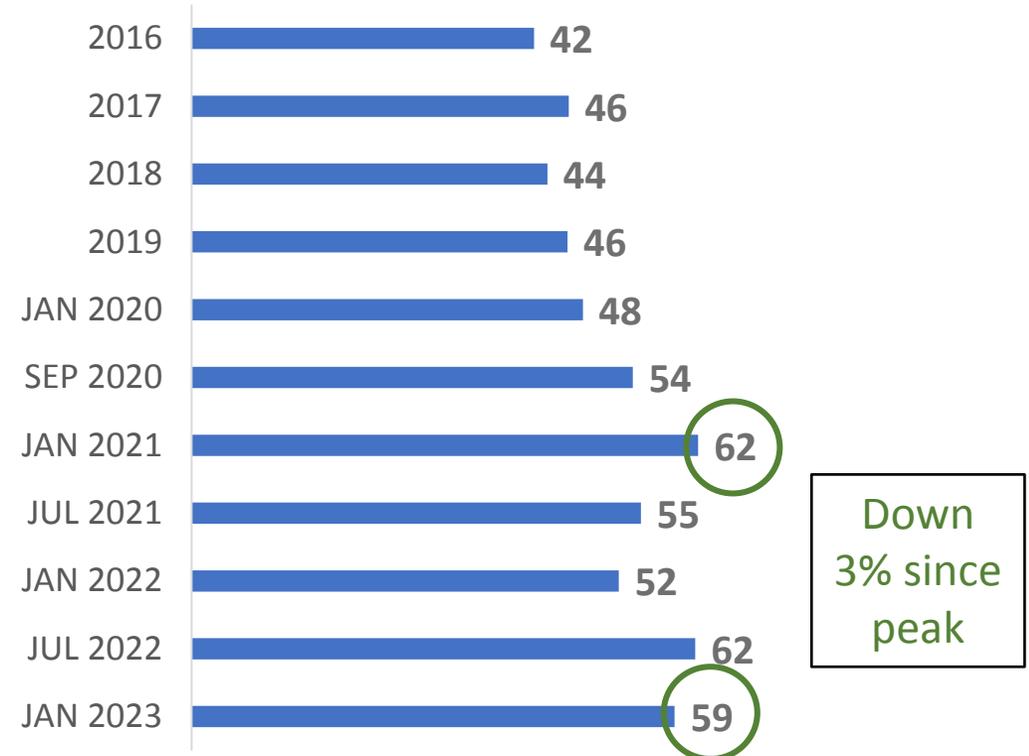
App Use –Past Week

Drive Through –Past Week

Percent Of Past-Week Out-of-home Drinkers Who Ordered Coffee Through An App



Percent of Coffee Drunk Yesterday Prepared Out-of-Home And Purchased From Drive-Through





The U.S. Coffee Drinker



Behaviors

Cautions

Opportunities



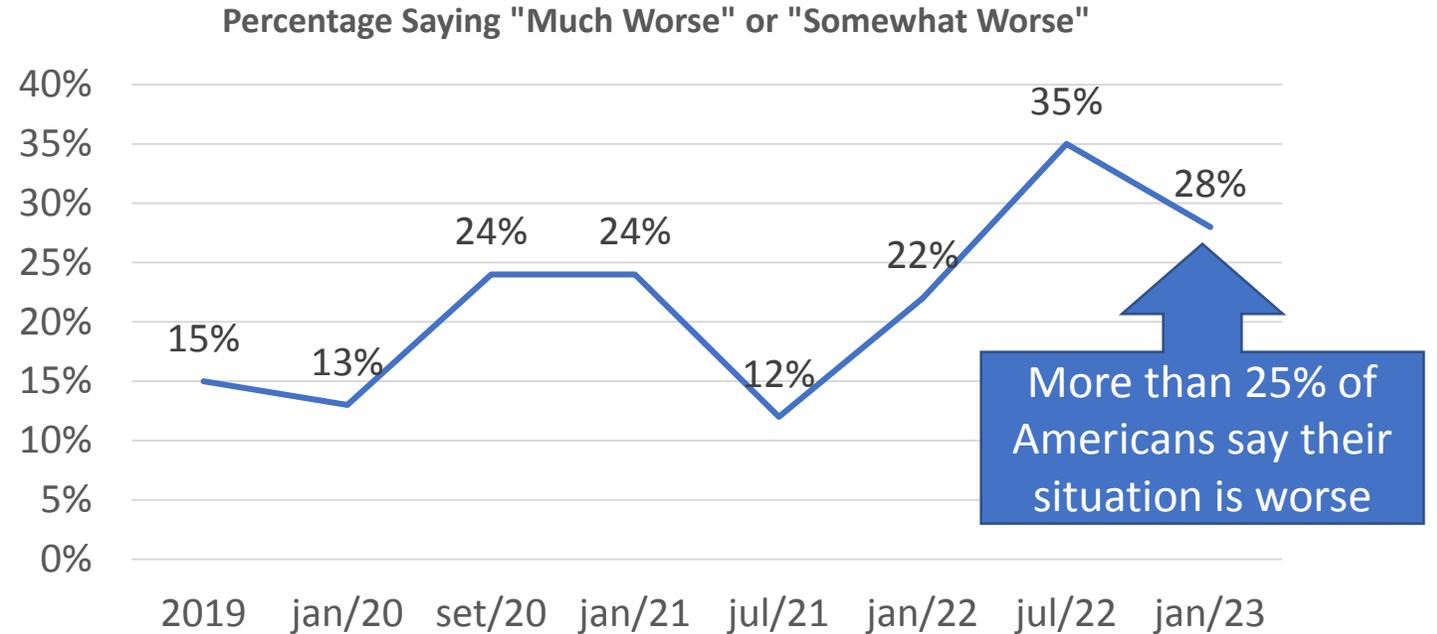
Cautions

Coffee drinking has so far remained stable.

Coffee drinkers tend to react to economic pressure by:

- Shopping for discounts
- Looking for less expensive coffee
- Joining loyalty programs
- Using coupons

Personal Financial Situation vs. 6 Months Ago





The U.S. Coffee Drinker



Behaviors

Cautions

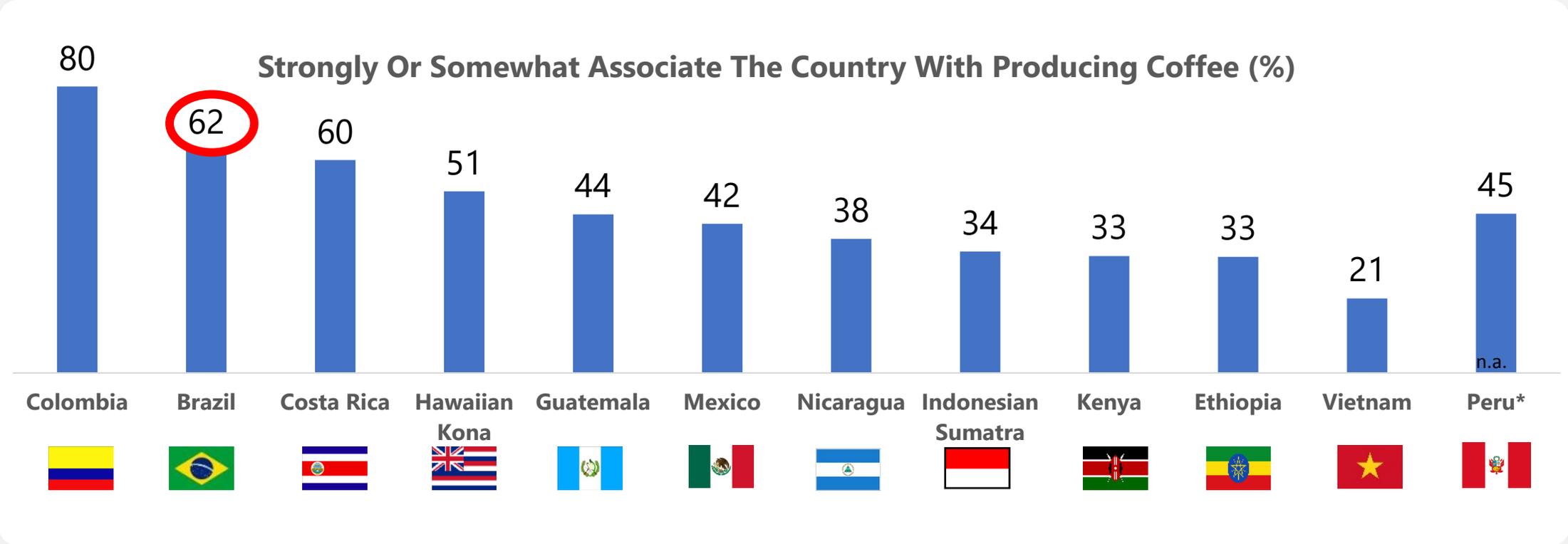
Opportunities



Opportunities

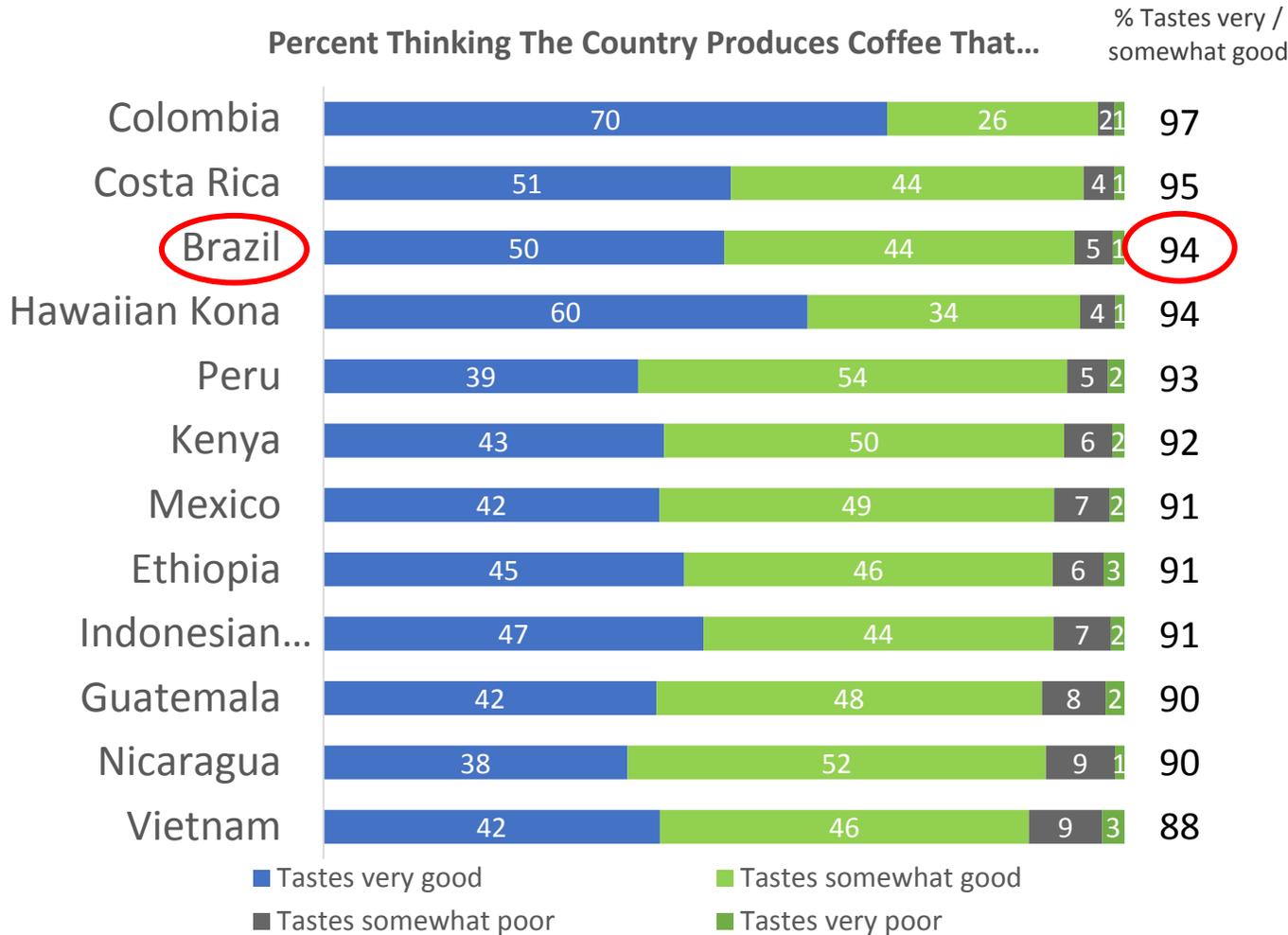
Coffee Origins

Americans strongly associate Brazil with coffee (62%)...



Opportunities

Perceptions of Coffee Quality Produced by Countries



Americans strongly associate Brazil with coffee...and GOOD coffee:

Brazil is tied for 3rd place (with Hawaii) as producing coffee that is “very good” or “somewhat good”



Opportunities

The Healthy Consumer...

Health-conscious customers account for **25-30%** of all grocery customers in the US and Europe.



Opportunities

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% Agree Completely	2019	2020	JAN 2021	JAN 2022	JAN 2023
Base	2,815	2,838	1,528	1,523	1,533
Coffee wakes me up and gets me going	32	30	31	35	38
It is important to limit my caffeine intake	26	26	25	24	28
Coffee helps me get things done	19	19	22	24	27
Coffee is one of several beverages I drink to give me energy	19	20	21	24	28
Coffee improves my mental focus	17	17	21	21	25
In the past year, I have heard information about the health benefits of drinking coffee	15	13	14	14	16
Coffee is good for my health	10	11	14	13	15
Coffee improves my physical endurance	11	11	12	14	16
Most coffee is grown in an environmentally sustainable way	10	9	11	12	13
In the past year, I have heard information about the health risks of drinking coffee	10	11	10	8	11
My doctor has advised me to limit the amount of coffee I drink	9	8	9	10	9
I pay a lot of attention to news and medical reports about coffee and caffeine	9	8	9	10	10
I've heard bad things about coffee in the news	7	7	8	7	7



Opportunities

The Confused Consumer...



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Opportunities

The Conscientious Consumer...



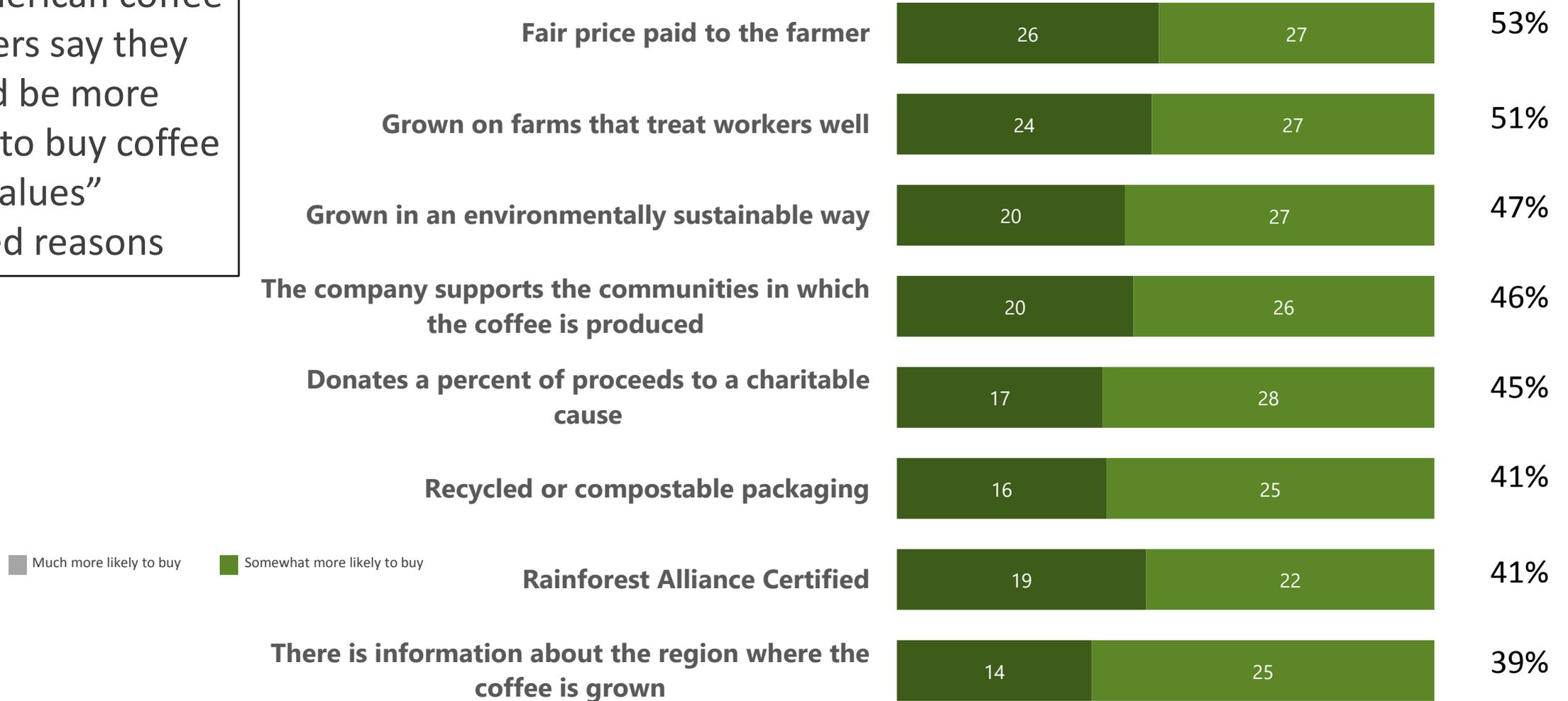
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Opportunities

A large percentage of American coffee drinkers say they would be more likely to buy coffee for “values” related reasons

Impact of Coffee Claims on Purchase Intent



For More Data on the U.S. Market: NCAUSA.ORG

The image shows a screenshot of the National Coffee Association (NCA) website. At the top left is the NCA logo with the text "nca NATIONAL COFFEE ASSOCIATION USA EST. 1911". To the right is a navigation bar with five items: "YOUR COFFEE BUSINESS" (with a coffee bean icon), "ABOUT COFFEE" (with a coffee cup icon), "ISSUES & REGULATION" (with a heart and pulse icon), "RESEARCH & TRENDS" (with a coffee leaf icon, circled in red), and "INDUSTRY RESOURCES" (with a gear icon). Below the navigation bar is a large banner for the "2023 National Coffee Data Trends Spring Edition". The banner features the NCA logo on the left and the text "2023 National Coffee Data Trends Spring Edition" in large green letters, with "The National Coffee Association of USA" below it. The background of the banner is a blurred image of coffee beans in a bowl.



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