



Passport

JDE PEET'S BV IN HOT DRINKS (WORLD)

March 2021

This sample report is for illustration
purposes only.

Some content and data have been
changed.

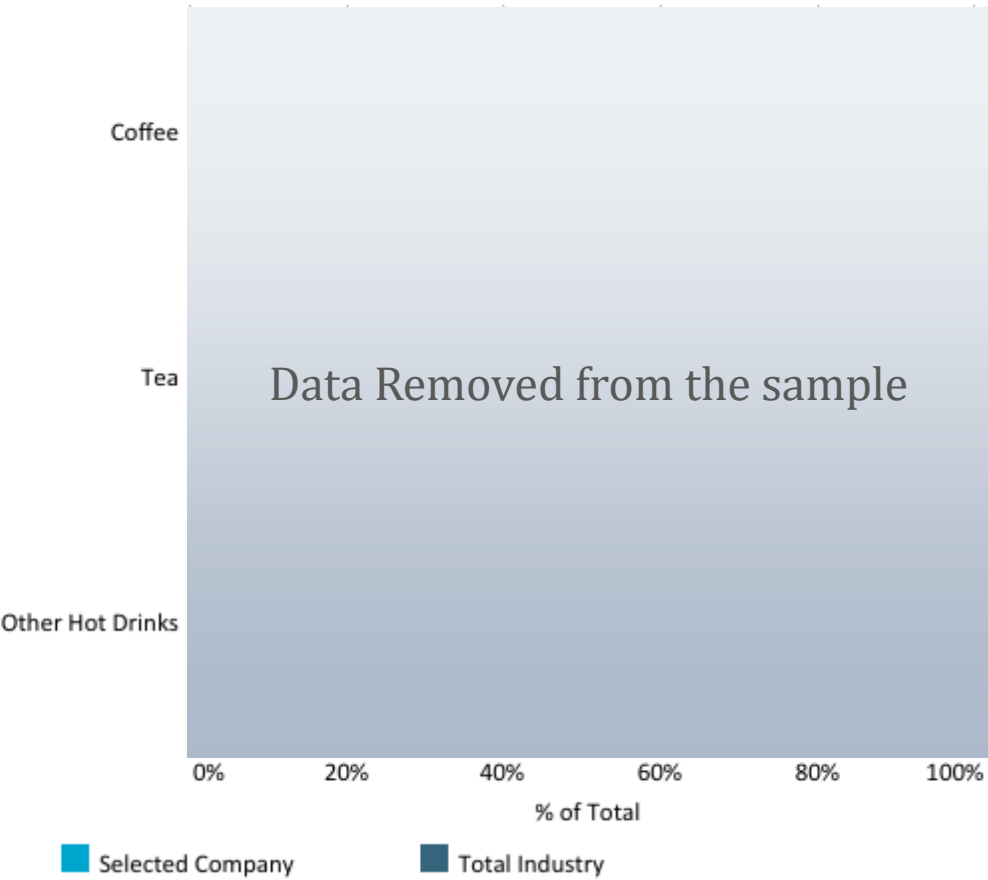
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Scope

JDE Peet's BV vs. Hot Drinks: Distribution of Sales by Category, 2020

Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates



Executive Summary

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STATE OF PLAY

EXPOSURE TO FUTURE GROWTH

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Top companies at a glance

Top 10 Companies in Hot Drinks: Key Facts and Figures, 2020
Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates (Historic Period: 2017-2020 and Projected Period: 2020-2023)

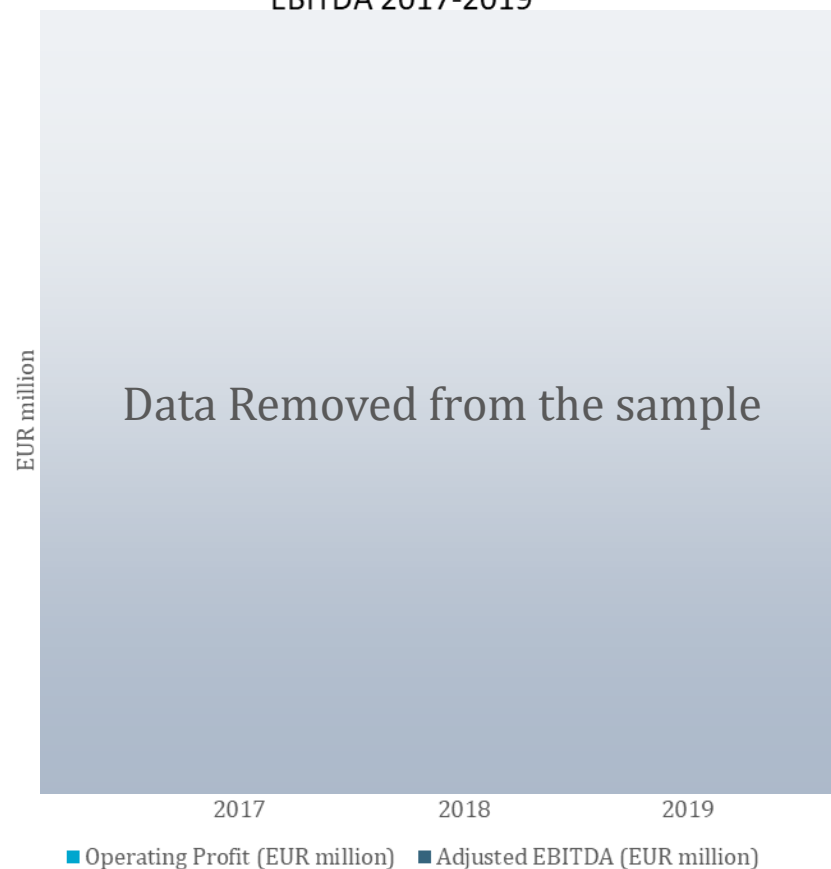
Max. Company Rank in Current Year	Global Brand Owner	Company Sales	Company Shares	Historic CAGR	Projected CAGR	Absolute Projected Growth
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Note: Company projections are based on researched markets only and not directly comparable with historic data which includes modelled markets and top down adjustments

JAB merged JDE and Peet's Coffee ahead of listing

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JDE Peet's Operating Profit and Adjusted EBITDA 2017-2019



Source: JDE Peet's Investor Relationships Website

Putting JDE Peet's into context

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Timeline: major milestones on the road to consolidation

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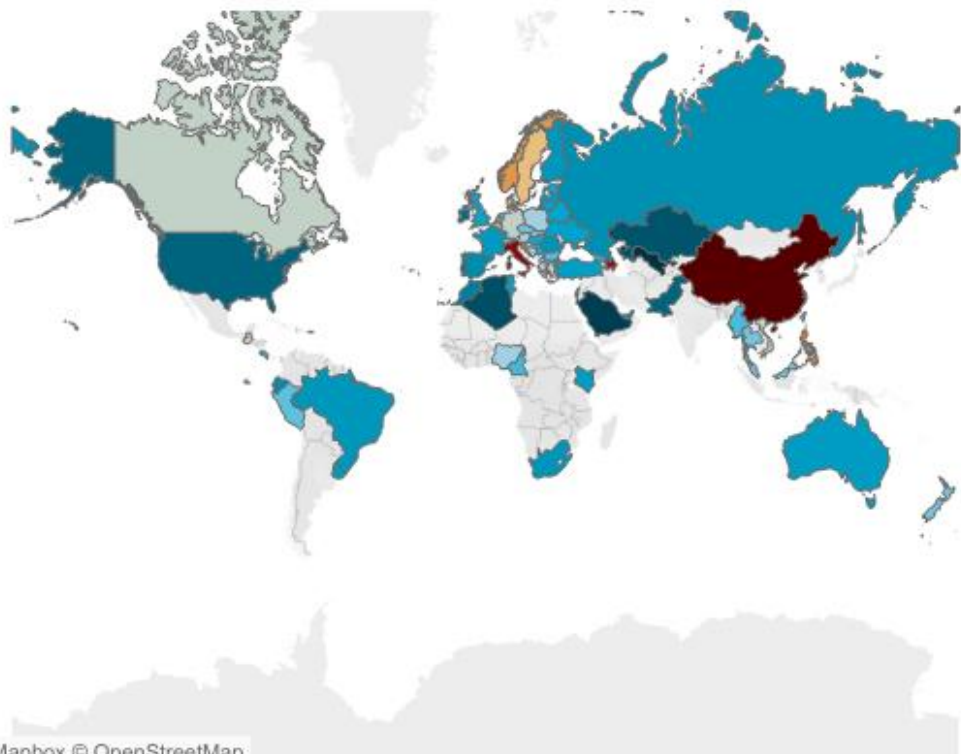
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JDE Peet's global footprint

Hot Drinks, 2020

JDE Peet's BV

Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates



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Historic CAGR

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Global Company Sales, 2020

USD million

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Regional Breakdown, 2020

USD million

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Company overview

Top Categories, 2020

Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates
(Historic Period: 2017-2020)

Coffee

Tea

Other Hot Drinks

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Company Sales

Top Countries, 2020

Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates
(Historic Period: 2017-2020)

France
Germany
Brazil
Russia
Netherlands
UK
Spain
US
Poland
Australia

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Company Sales

Absolute Historic Period Growth

Decli..

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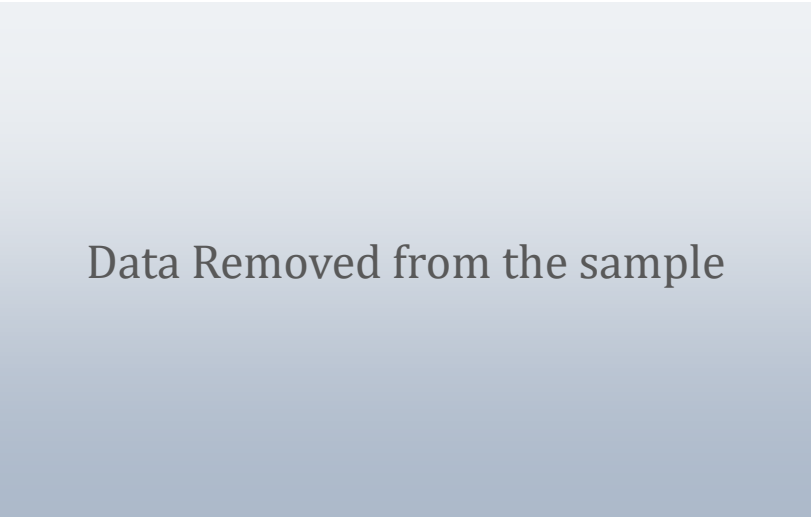
Growth

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Growth decomposition

JDE Peet's BV: Decomposition of Sales Growth by Contributing Factors, 2017-2020

Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates



Growth From Market Momentum Growth From Market Share Growth From MnA Grand Total

Absolute Historic Period Growth

Decli.. Data Removed from the sample Growth

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Impact of COVID-19 on JDE Peet's (1)

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Impact of COVID-19 on JDE Peet's (2)

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Expansion of Peet's at-home in the US

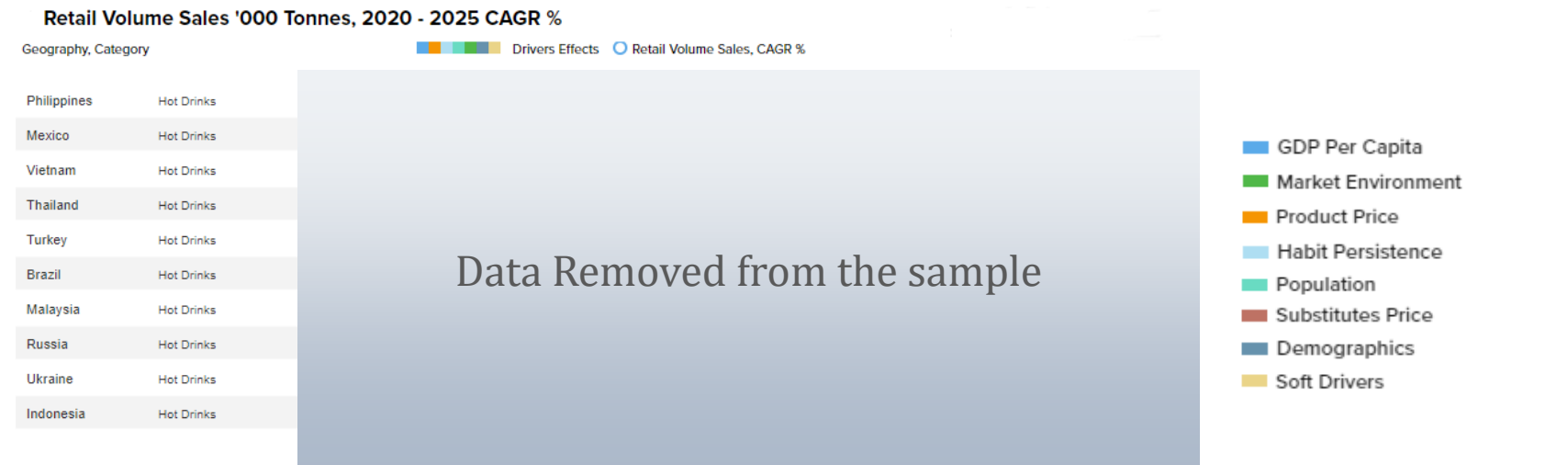
Peet's Coffee and Tea Inc Retail Value Sales in the US 2016-2020



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Driving growth in developing countries

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Focus on single-serve and coffee beans

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Fresh Coffee Pods and Coffee Beans Retail
Value Forecast CAGR % per Region
2020-2025



Pursuing new growth opportunities in China

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Number of Specialist Coffee and Tea Shops
in China: Outlets 2015-2020

Units/outlets

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2015 2016 2017 2018 2019 2020

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Developing countries to drive growth

JDE Peet's BV: Top 10 Growth Areas, 2020-2023

Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates

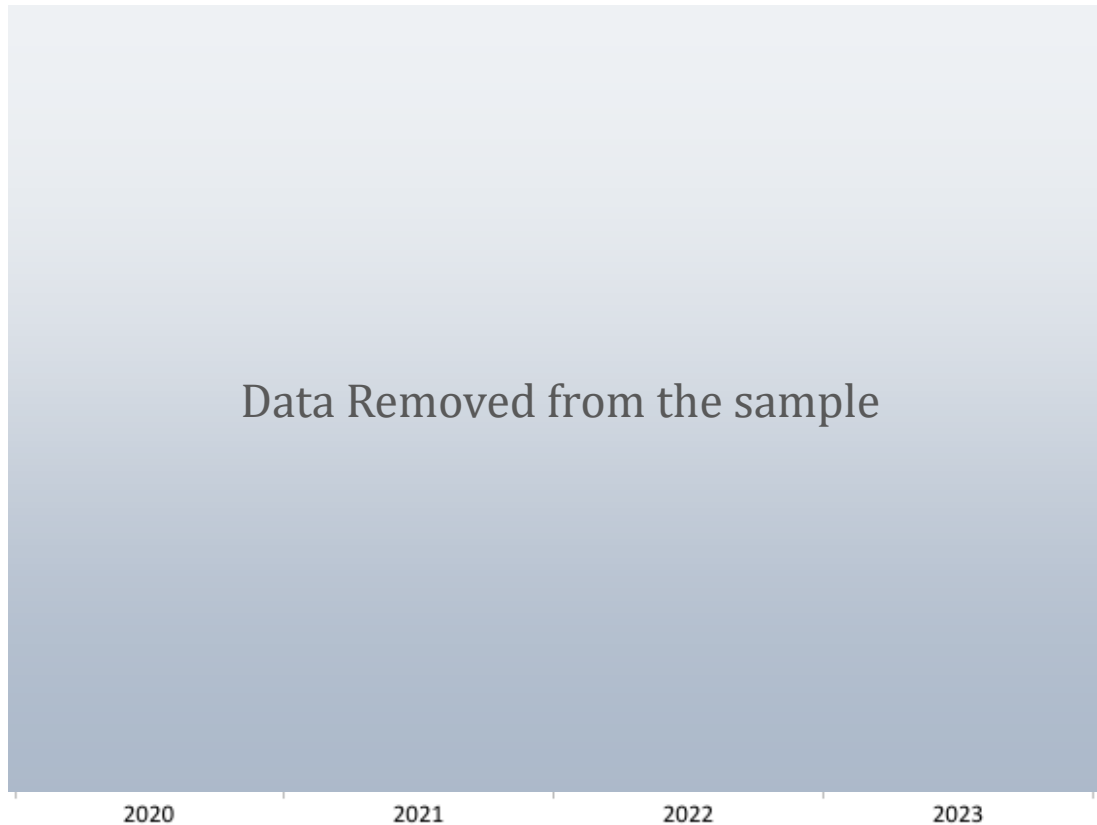
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Note: Absolute projected sales represent the net increase/decrease in annual sales between 2020 and 2023. See appendix for methodology on projected company sales.

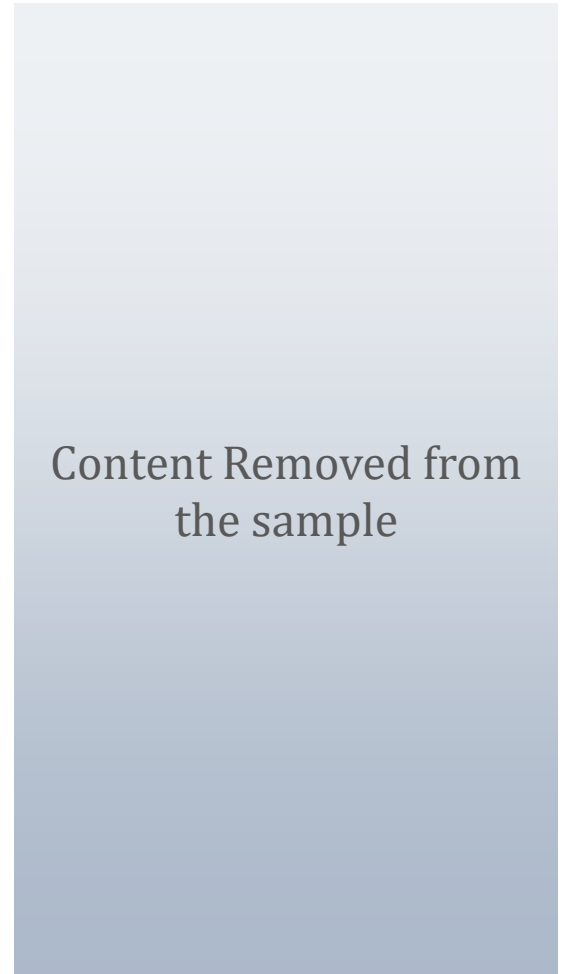
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the sample

Projected rankings

JDE Peet's BV vs the Competition, 2020-2023



Note: Sales projections based on 78 researched countries, see appendix for methodology on projected growth



JDE Peet's drives growth through its wide portfolio

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Source: JDE Peet's website

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The group maintains its strong position in the global hot drinks market

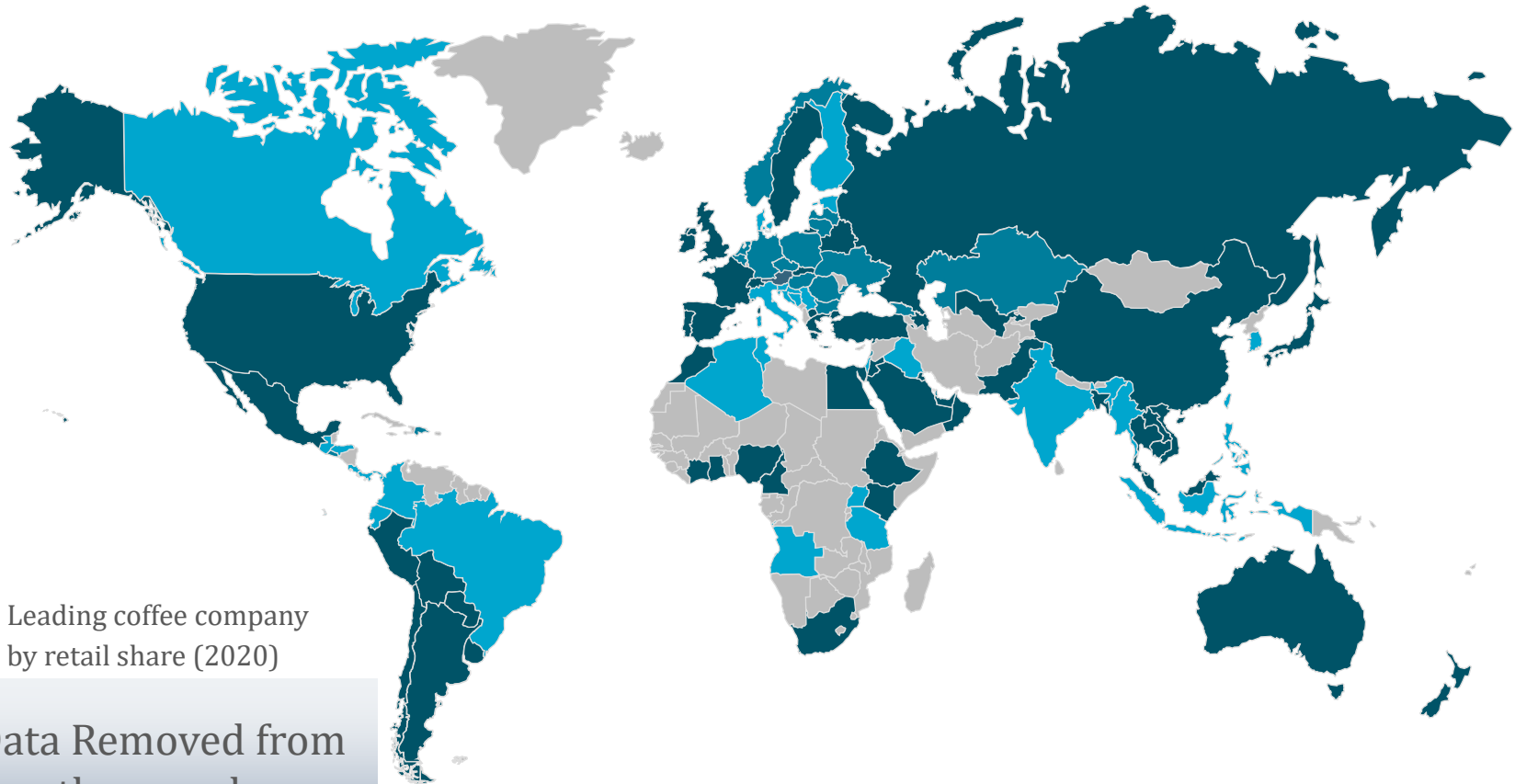
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Top 10 Companies in Hot Drinks: Sales and Shares, 2017-2020
Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates



Nestlé or JDE Peet's are at the top in much of the world

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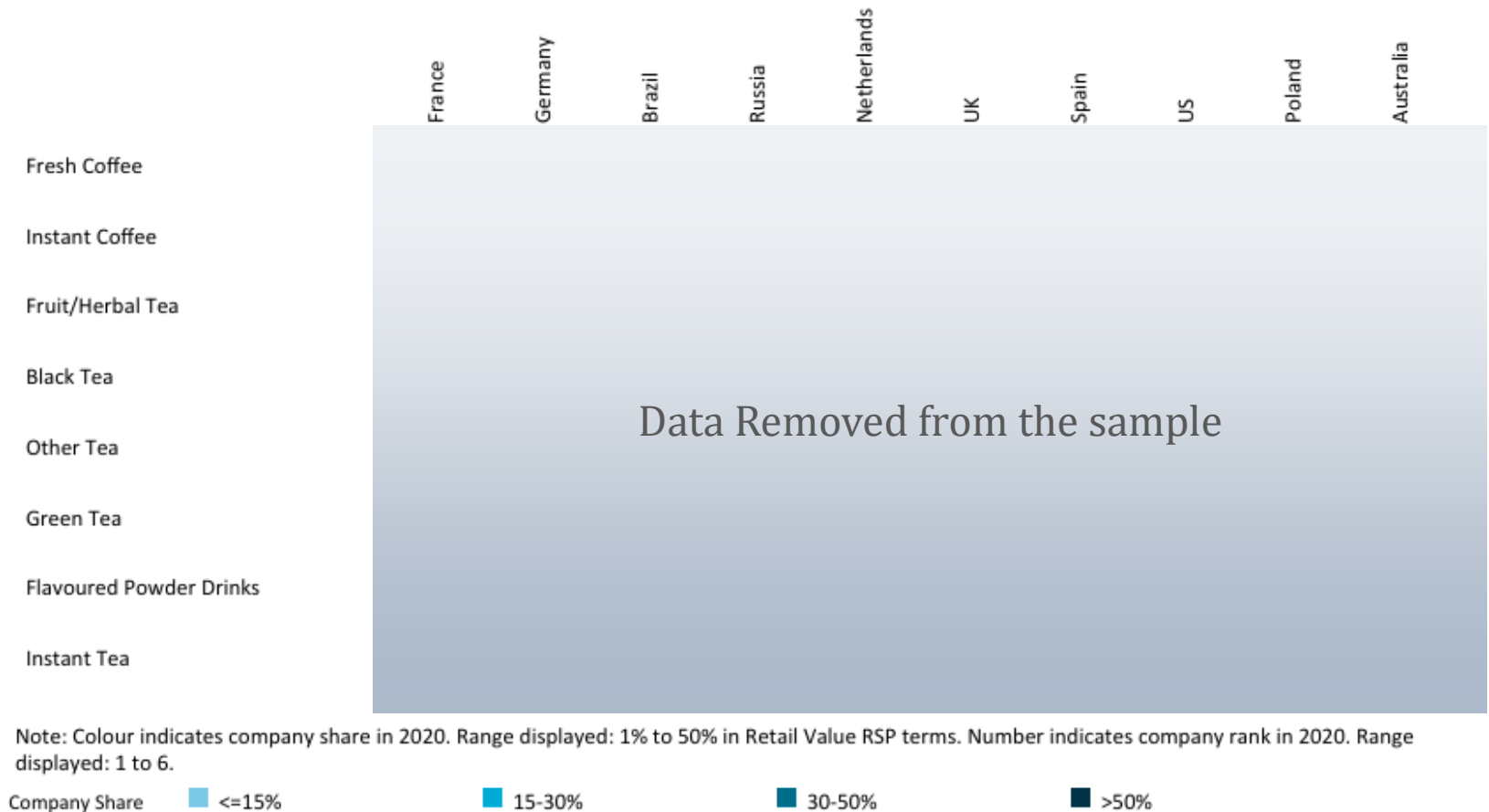


Leading coffee company
by retail share (2020)

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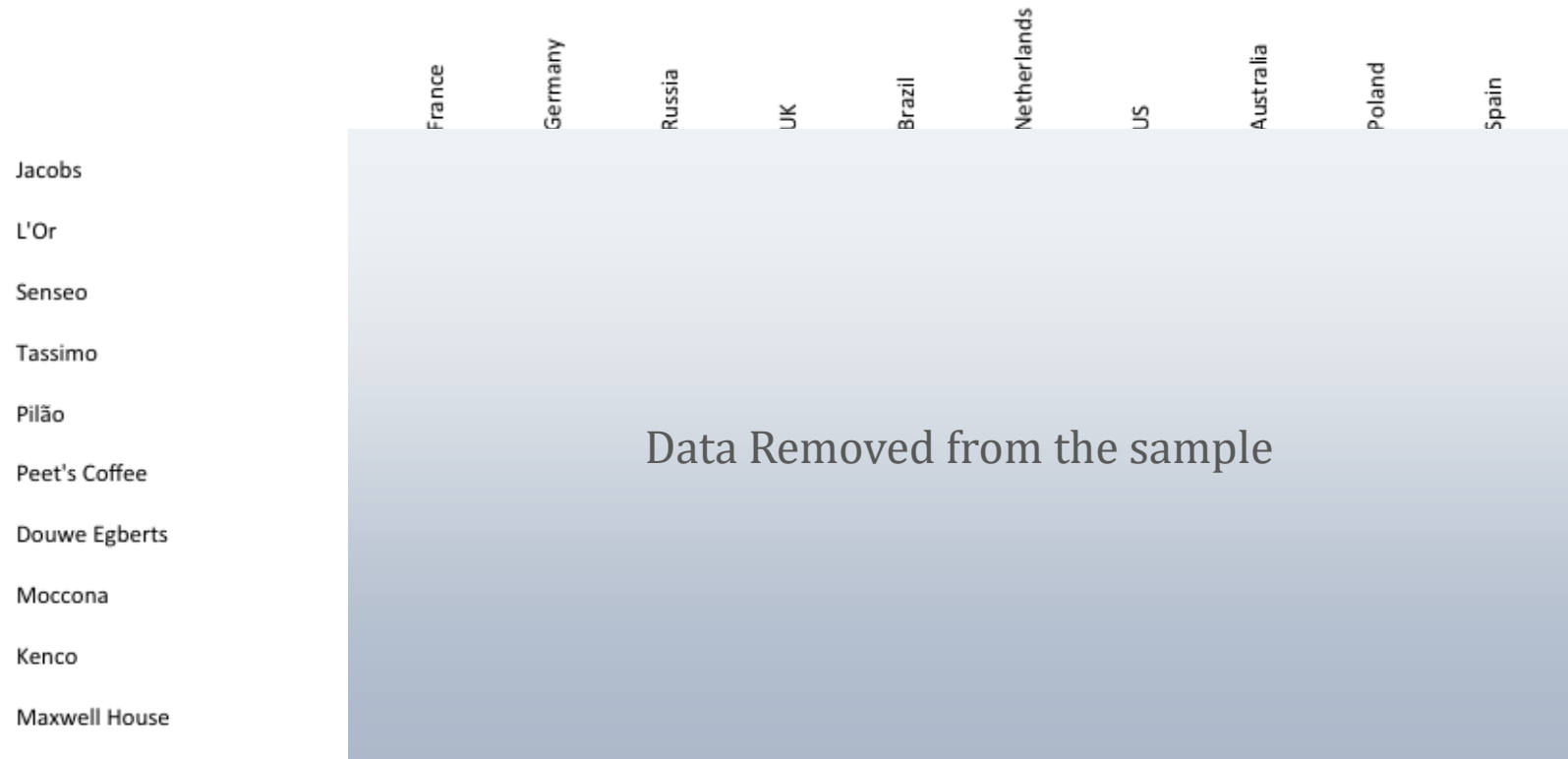
Strong positioning in the Netherlands and Spain within its tea portfolio

JDE Peet's BV: Company Leadership Across Top Countries and Categories, 2020



Jacobs confirms its leadership in Germany and Poland

JDE Peet's BV: Company Leadership Across Top Countries and Brands, 2020



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Positive performance among all regions

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JDE Peet's BV: Coffee, 2020 and CAGR, 2015-2020 by Region

Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates

Historic CAGR

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Market Size

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Western Europe
North America
Eastern Europe
Asia Pacific

Latin America
Middle East and Africa
Australasia

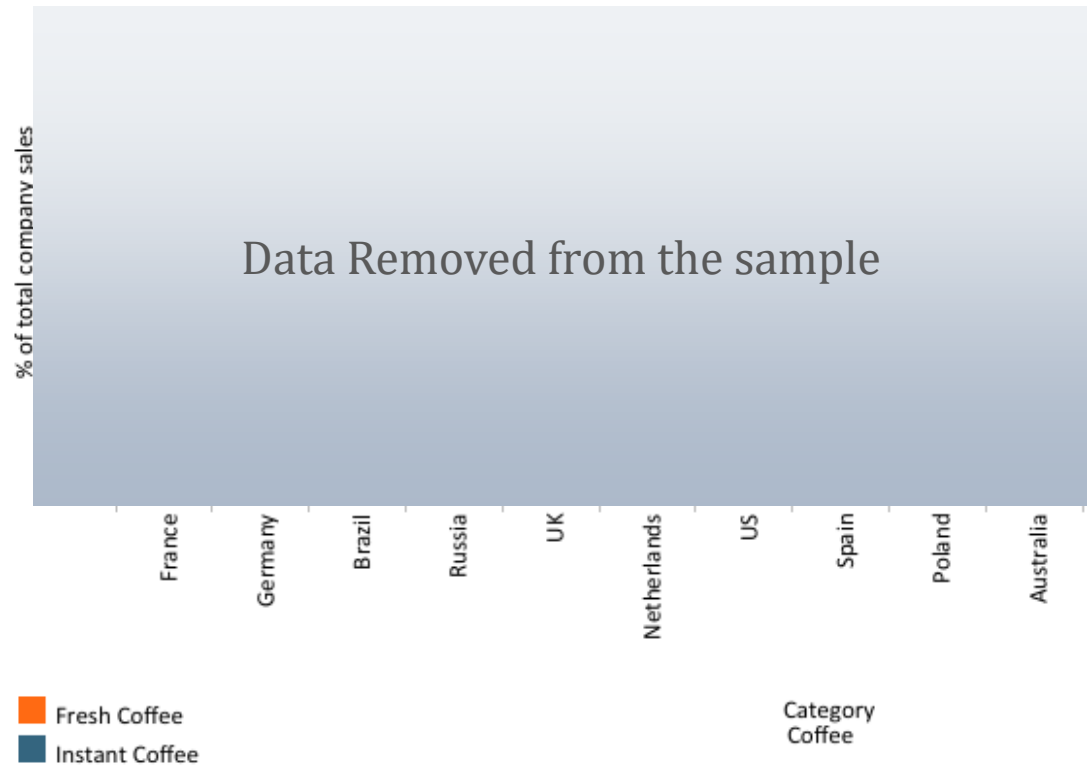
Coffee

In the key markets fresh coffee is the big seller

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JDE Peet's BV: Top Markets in All by Category, 2020

Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates



Significant growth opportunities in Brazil, France and Russia

JDE Peet's BV: Top 10 Growth Areas in Coffee, 2020-2023
Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates

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the sample

JDE Peet's to increase its online presence

Average Online SKUs Availability of JDE Peet's per
Month - Top Selected Markets:
January 2020 – January 2021

*11 March 2020 the Novel Coronavirus Disease, COVID-19, was
declared a pandemic by the World Health Organization*



Top Three Brands per No. of SKUs in Selected Markets:
January 2020 vs January 2021

Country	Brands	Jan-20	Jan-21	Δ%
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sample

Future growth trends in instant coffee stand to benefit Jacobs

Retail Value Sales, Real US\$ mn, 2020 - 2025 CAGR %

Driver Effect:



2020 Constant Prices, 2020 Fixed Year Exchange Rate

Geography, Category

Drivers Effects Retail Value Sales, Real, CAGR %

Developed countries Instant Coffee

Emerging and Developing countries Instant Coffee

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Source: Euromonitor International Hot Drinks Industry Forecast Model

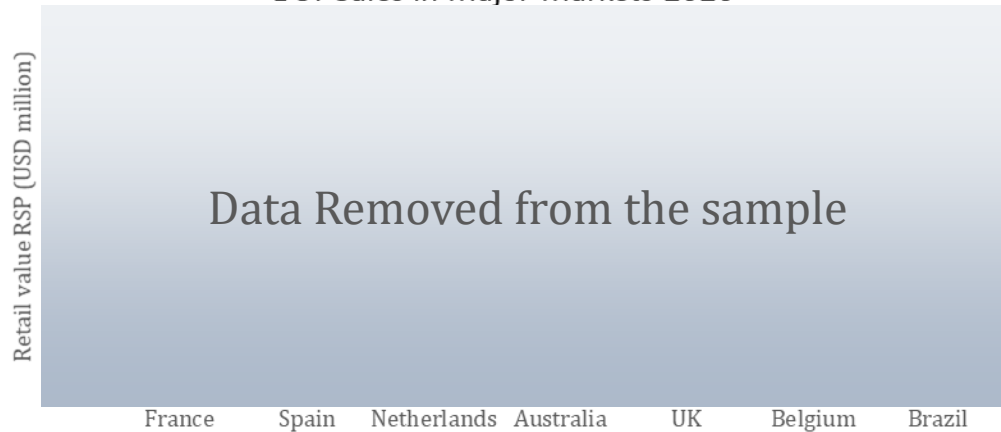
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Top brands in fresh coffee pods

Sales of JDE Peet's Key Global Pod Brands 2015-2020



L'Or Sales in Major Markets 2020



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Pursuing new growth opportunities in tea

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JDE Peet's BV: Tea, 2020 and CAGR, 2015-2020 by Region

Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates

Historic CAGR

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Market Size

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Tea

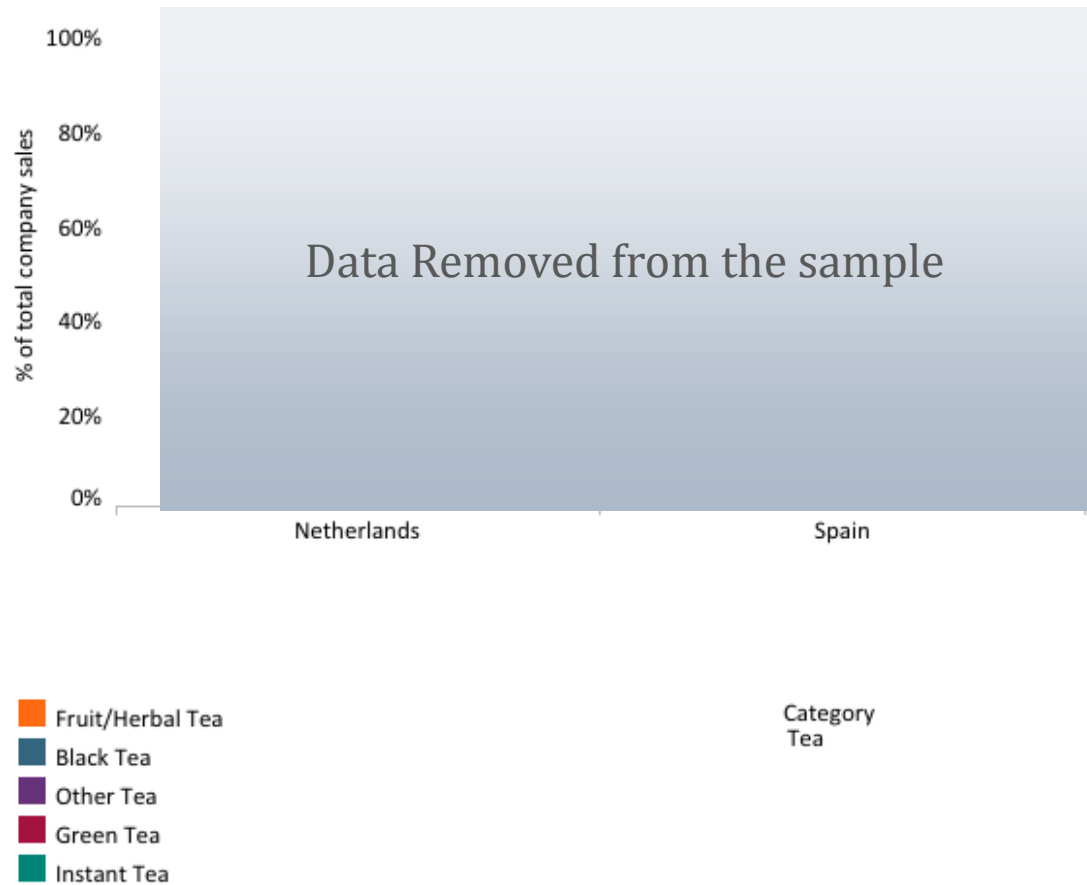
- Western Europe
- Eastern Europe
- Latin America
- Australasia

Fruit/herbal tea to lead growth in top markets

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JDE Peet's BV: Top Markets in All by Category, 2020

Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates



Tea sales to increase in Turkey

JDE Peet's BV: Top 10 Growth Areas in Tea, 2020-2023

Company Retail Sales RSP - USD million - Current - Fixed 2020 Exchange Rates

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Key Findings

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Projected Company Sales: FAQs

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Projected Company Sales: FAQs

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Via details

- Via Pricing is a new price and assortment intelligence solution built from web data extraction. Every day we capture data for more than 17 million SKUs from 1,500 e-commerce websites across 40 countries, providing daily updates to online retail pricing, assortment size and key product attributes.
- Via Pricing is built using a combination of our long-standing research expertise and web data extraction technology. Using Artificial Intelligence (AI), text and image recognition technology we match the same product (SKU) across multiple websites and also map each SKU to our existing product taxonomy.
- Our global team of fmcg industry analysts help train the AI to accurately match SKUs to the correct product category, brand owner and brand family, and then spot check product matching and taxonomy mapping to guarantee Via Pricing's continued accuracy. Their industry expertise and fluency in local languages ensures the right products are being correctly matched across markets and retailer websites.
- Our ability to match millions of SKUs to their corresponding category, brand owner and brand allows us to impose structure on a vast data set. In addition to viewing SKUs one by one, Via Pricing provides comprehensive price data by category, brand owner, brand, or retailer directly built from individual SKUs.



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