



IC Market Tracking
Coffee
Away-from-Home
Europe 2020

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Your Benefits at a Glance

- ✓ Overview of the development of the **total market** and the **individual Segments**.
- ✓ **Market Forecasts** for all product segments and regions for the upcoming three years, based on our econometric models.
- ✓ Awareness of **Market Position** and development during the last two years, in comparison with major competitors and with respect to:
 - Total Market
 - Regional Markets
 - Product Groups
 - Customer Segments
- ✓ Information about the most important **Factors of Influence**
- ✓ Graphic Presentation of the results facilitates the development of your own strategies.



Coffee Away-from-Home 2020

Hungary

Slovenia

Croatia

Austria

Germany

Italy

Market divided by

HO.RE.CA Market

| Product Groups | Customer Segments |
|-------------------|-----------------------|
| Whole Bean Coffee | Hotel |
| Ground Coffee | Restaurant & Catering |
| Coffee Pads | Coffeehouse |
| Coffee Capsules | Bakery & Confectioner |

Non-commercial Market for Coffee*

| Product Groups | Customer Segments |
|------------------------|------------------------|
| Whole Bean Coffee | Office |
| Ground Coffee | Transport & Leisure |
| Coffee Pads | Healthcare & Education |
| Coffee Capsules | |
| Others (e.g.: Instant) | |

*The analysis of the non-commercial market for coffee is available only for Germany and Italy. HO.RE.CA market is available for all 6 countries.

Definition and Demarcation

Categories

Turnover is stated in 1.000 Euro under brand name. Values are always net-turnovers (not list-prices), excluding VAT

Market volume is stated in tons

Customer Segments

The sales period covered is the calendar year 2019/2018.

Hotel

Hotel / Bed & Breakfast Place / Guesthouse

Restaurant & Catering

Restaurant / Bar / Pub / Eventcatering

Coffeehouse

Coffeehouse / Coffee Shop / Cafè

Bakery & Confectioner

Backery / Confectioner

Office

SME / Large Company

Transport & Leisure

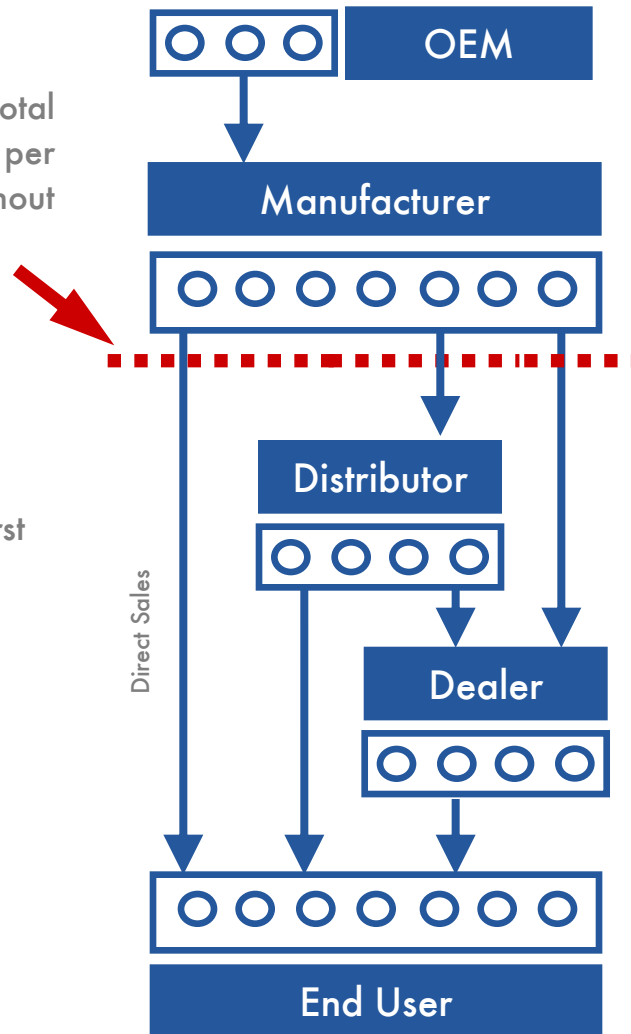
Train / Ship / Airplane / Spectacle Venue / Sports Area / Wellness Centre etc.

Healthcare & Education

Hospital / Clinic / School / University / Nursing Home etc.

Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM)

Sales are segmented by the first distribution partner.



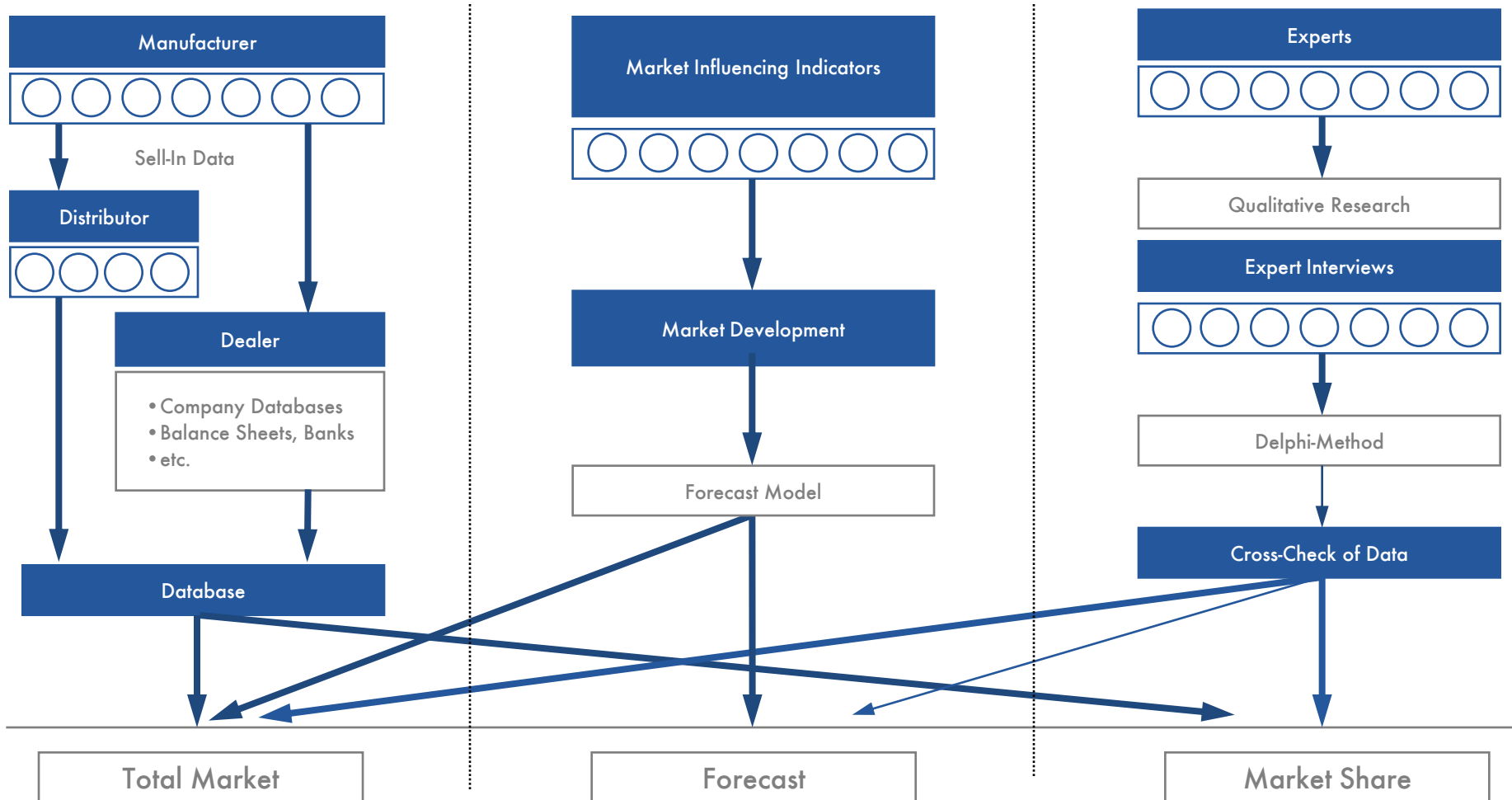
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Interviews with distributors and specialised dealers act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.

Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology

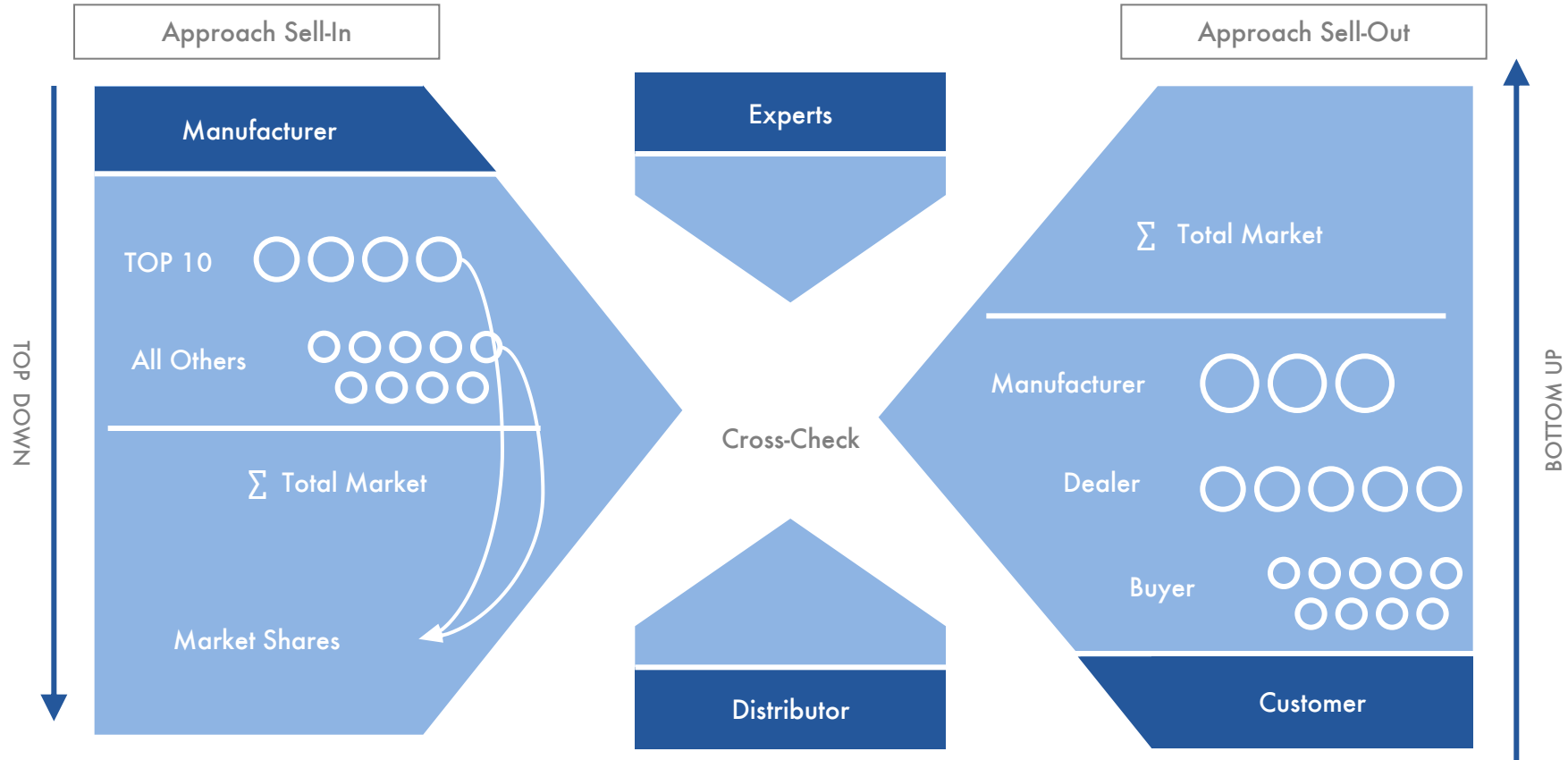
Methodology



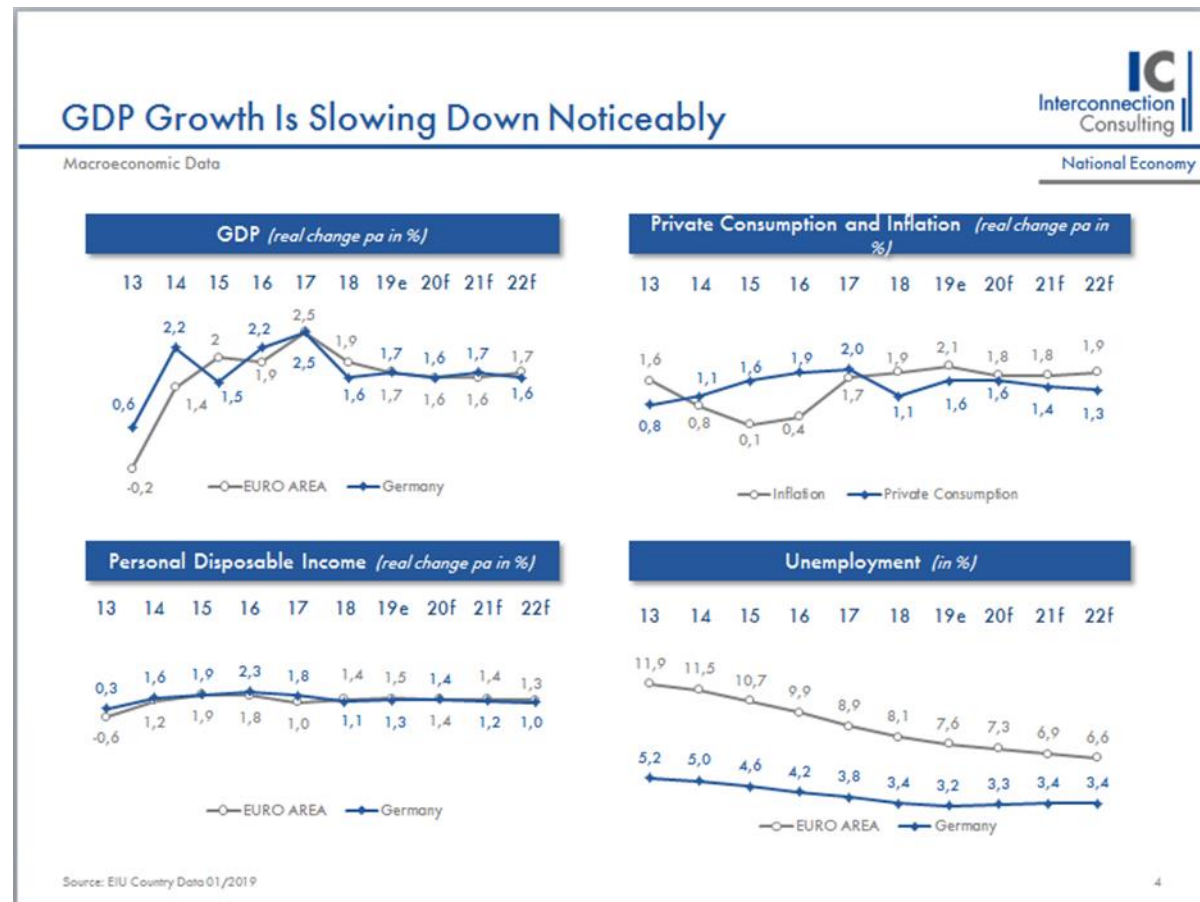
Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Methodology

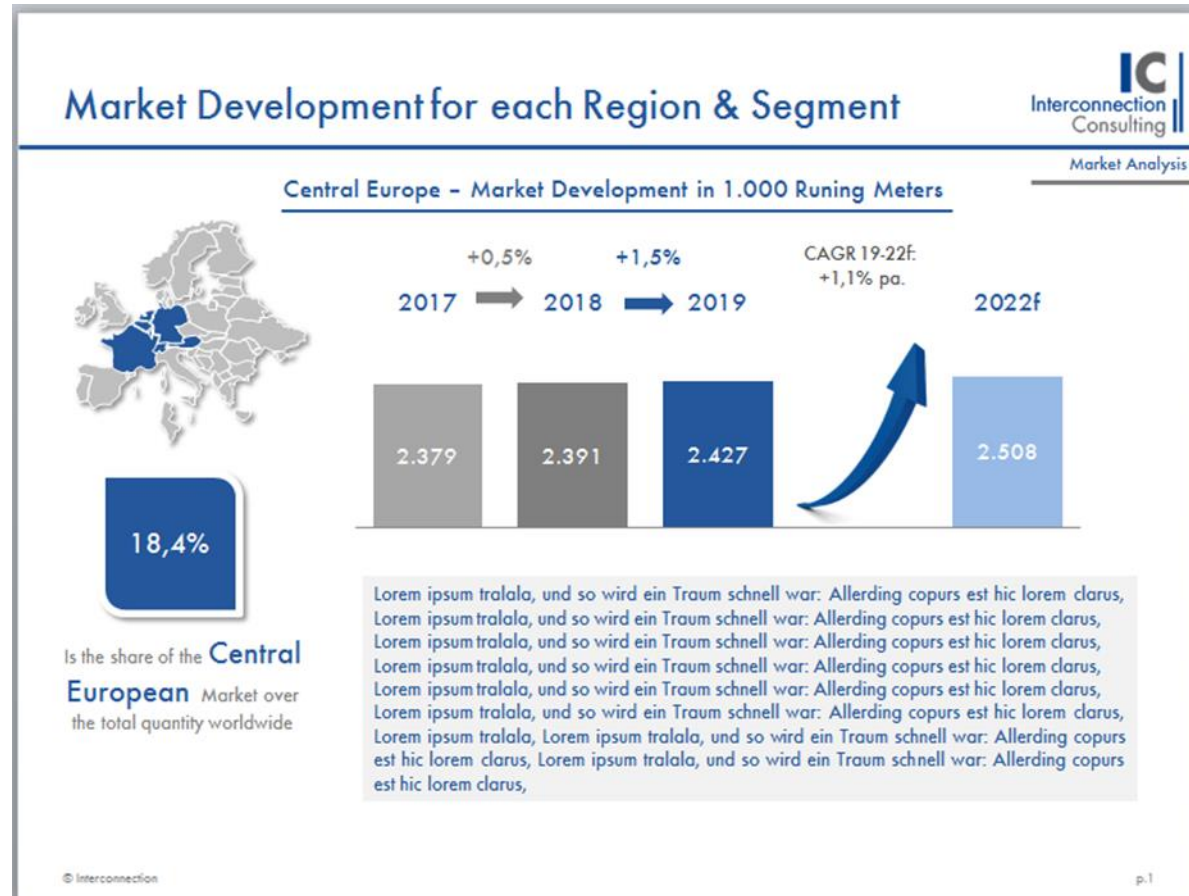


- The data for the market environment consists of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators.
- *This chart shows dummy figures.*

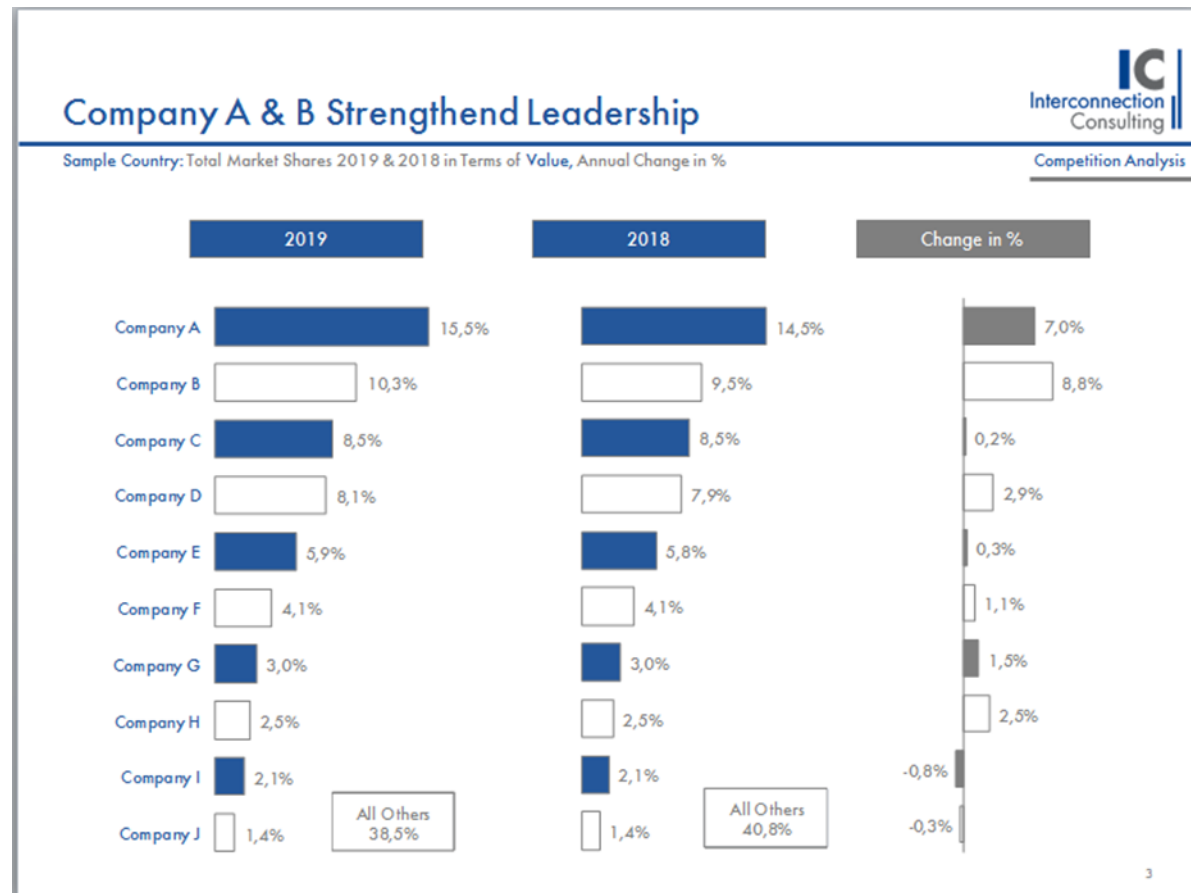


What Is the Total Market Development?

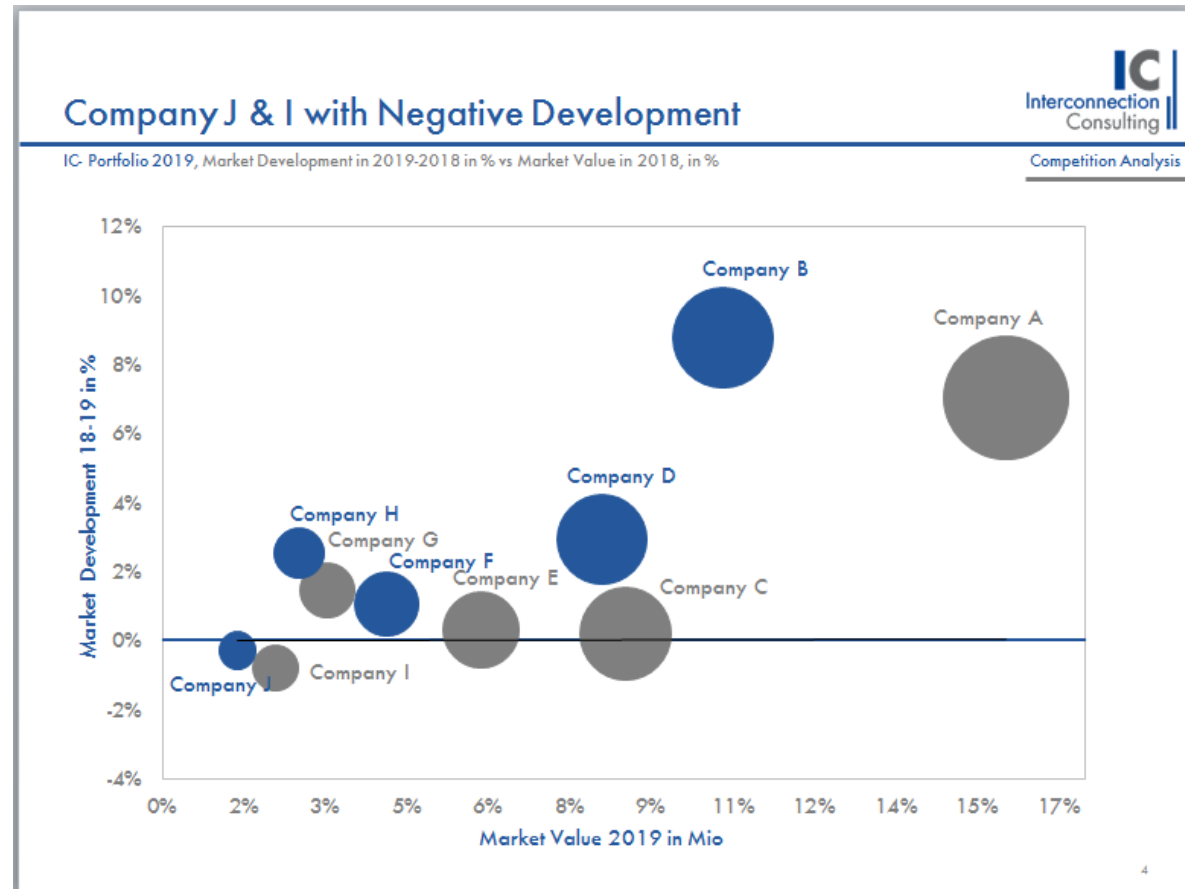
- Overview of the total market until the current year and forecast for the upcoming three years.
- *This chart shows dummy figures.*



- Detailed description of the most important Companies in the examined market by reference to market shares, changes, BCG-Portfolios, etc.
- *This chart shows dummy figures.*

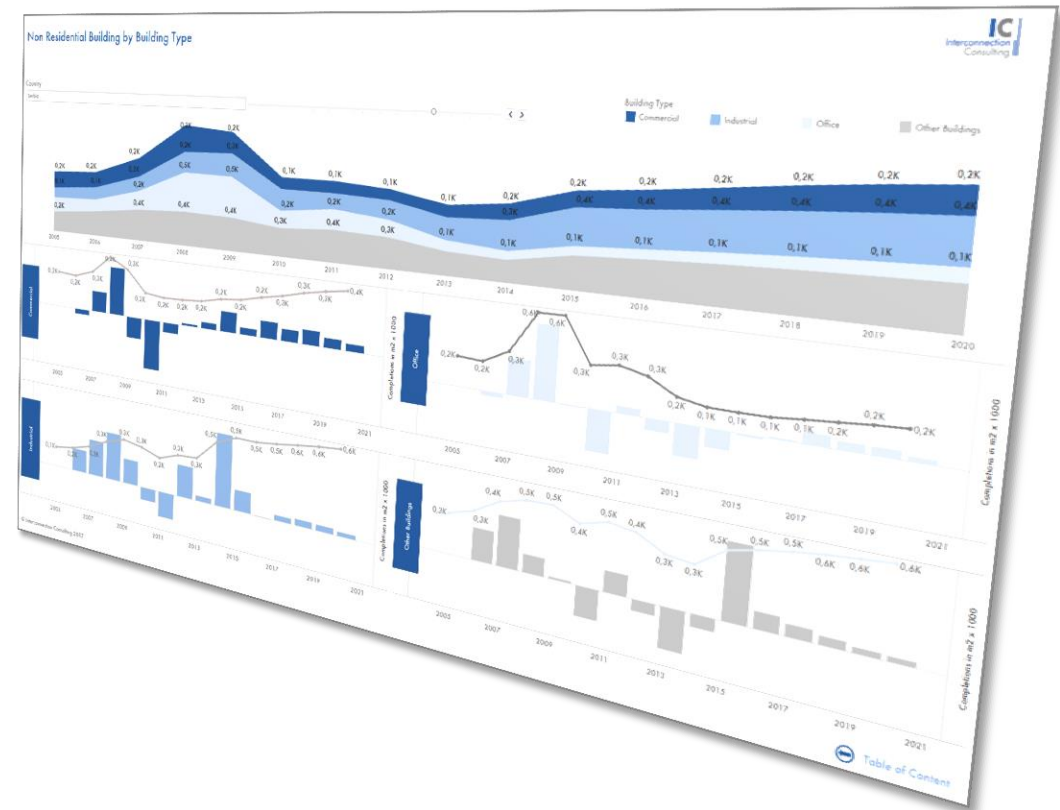


- Detailed analysis of important market segments in analysed regions with market shares and development
- *This chart shows dummy figures*



The Most Efficient Way to Present and Work with Data

- We provide you also the possibility to implement all data in a dashboard solution based on Tableau.
- Together we will define what the final Tableau-Cockpit should look like to present you the data in the most efficient way for your work.
- In course of a subscription of our reports, fees for the dashboard creations will only occur in the first year. In the subsequent years the updated market data will automatically be uploaded in the software.



Your Benefits at a Glance

A picture says more than 1000 words

- **Complex correlations** are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards
Updates annually

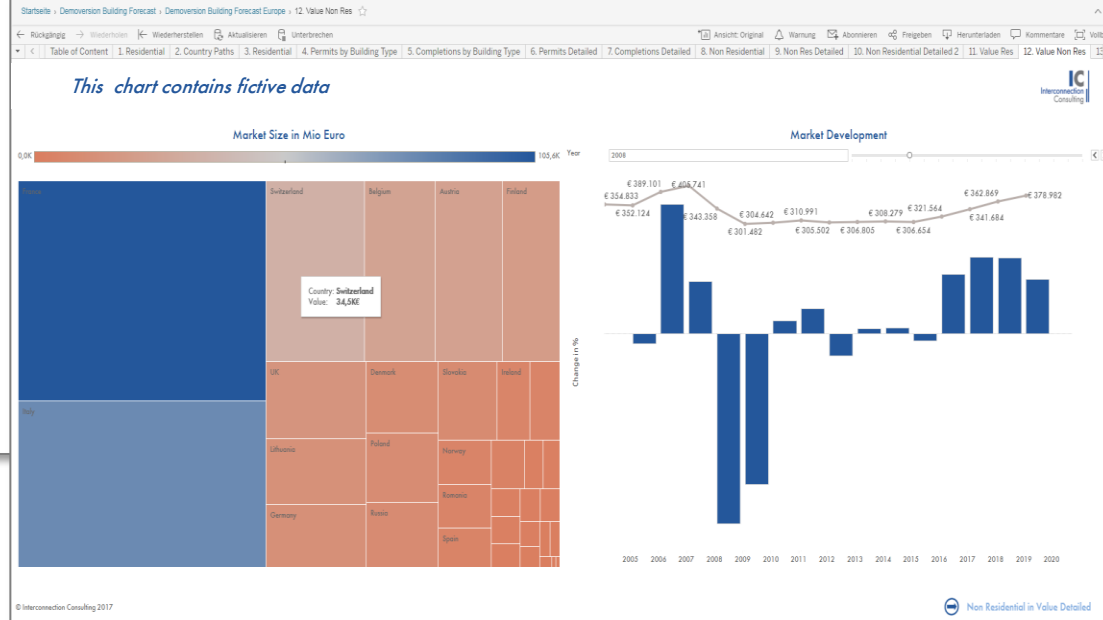
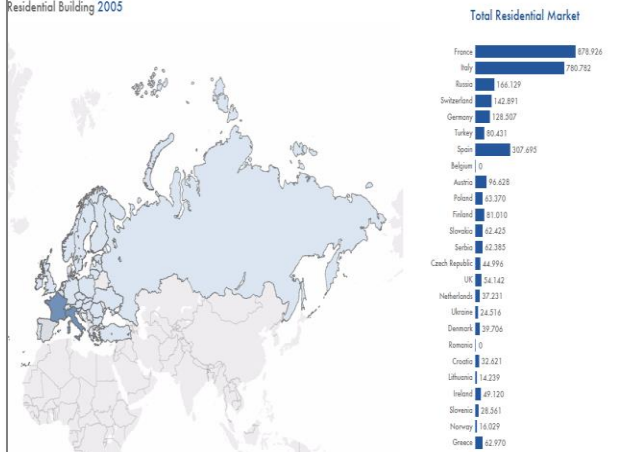
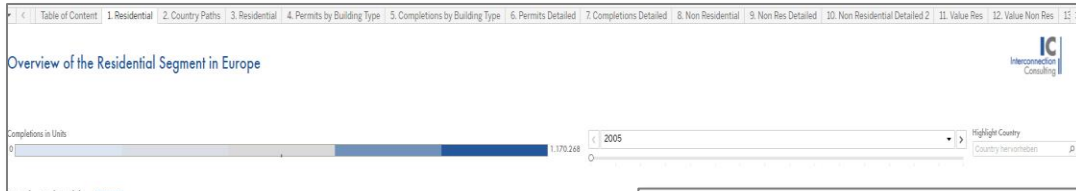
- Use **interactive dashboards** for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.

Easy online accessibility

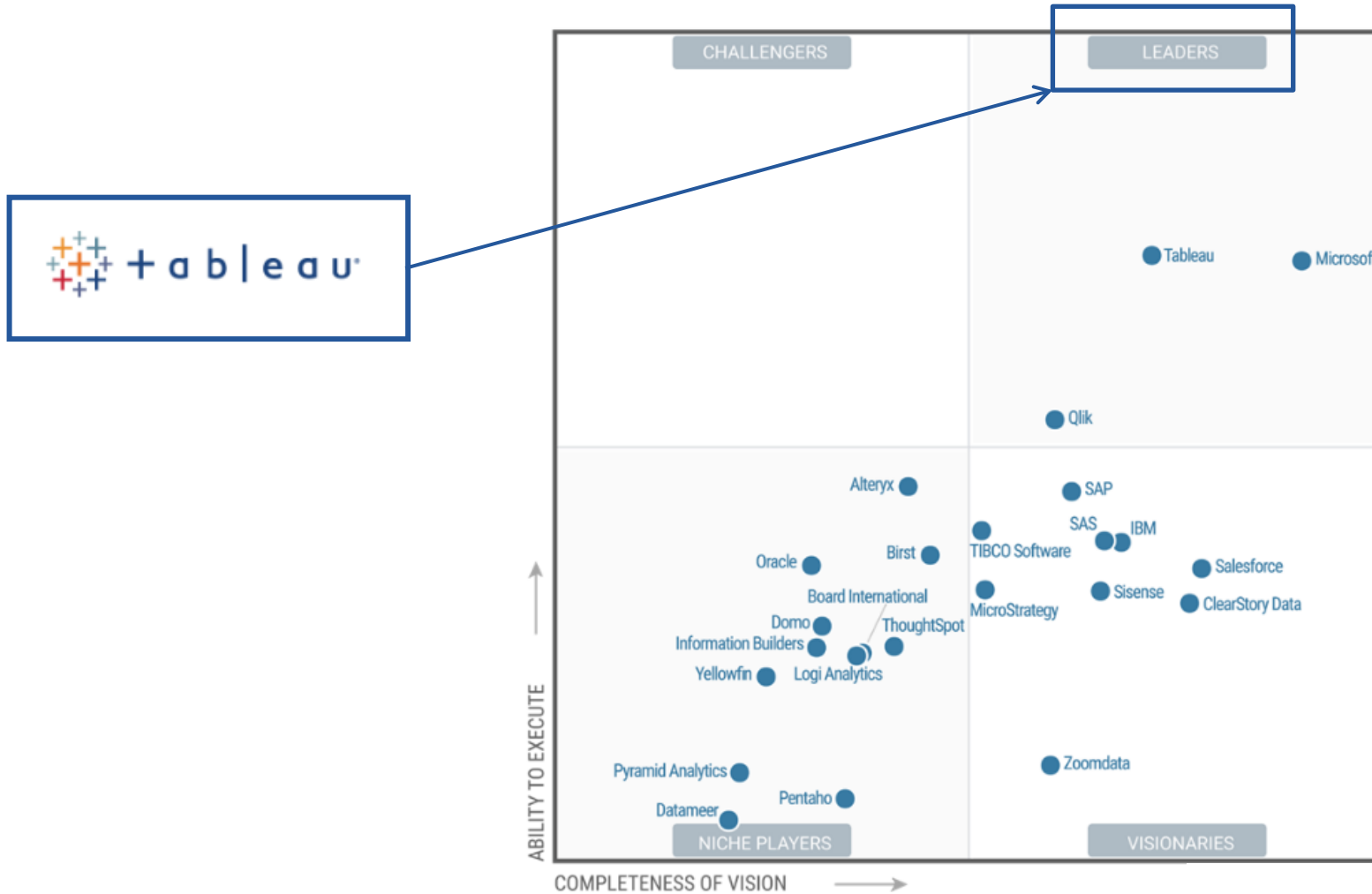
- Market data are available wherever you have internet access
- You can also **export** the data as .jpg, .csv or .pdf file



You can See at a Glance which Markets and Segments are Developing Best



IC Managementsystem Implementation with the Best BI Tool on the Markt!



Source: Gartner Magic Quadrant für Business Intelligence and Analytics, 2017

| | Subscription** | Available countries | | | | | | | | | | | |
|------------------------|----------------|------------------------------------|--|--------------------|--|------------------------|--|---------|------|---------|------|----------|------|
| Ho.Re.Ca | | | <table border="1"> <thead> <tr> <th colspan="2">Scale of Discounts</th> </tr> <tr> <th colspan="2">from a buying price of</th> </tr> </thead> <tbody> <tr> <td>€ 5.000</td> <td>-10%</td> </tr> <tr> <td>€ 7.500</td> <td>-20%</td> </tr> <tr> <td>€ 10.000</td> <td>-25%</td> </tr> </tbody> </table> | Scale of Discounts | | from a buying price of | | € 5.000 | -10% | € 7.500 | -20% | € 10.000 | -25% |
| Scale of Discounts | | | | | | | | | | | | | |
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| € 7.500 | -20% | | | | | | | | | | | | |
| € 10.000 | -25% | | | | | | | | | | | | |
| Single Country | € 3.500,- | GER ITA AUT | | | | | | | | | | | |
| All Countries | € 9.950,- | HUN CRO SLO | | | | | | | | | | | |
| Away-From-Home* | | | | | | | | | | | | | |
| Single Country | € 4.950,- | GER ITA | | | | | | | | | | | |
| Package* | € 11.999,- | GER ITA AUT GER HUN CRO SLO ITA | | | | | | | | | | | |

For single issue purchase, please contact the responsible consultant Laszlo Barla

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Tel.: +43 1 585 46 - 68

* Away-from-home market includes both Ho.Re.Ca and Non-Commercial Market for coffee, available only for Germany and Italy. Package includes Ho.Re.Ca for all 6 countries and Non-Commercial Market for 2 countries (Germany & Italy)

** Annual price for at least two orders of the study (order year and the following year). Subscription customers receive an update of the ordered study offer six months. The subscription can be cancelled after two purchases of the study, but not later than at the 31.12. of the year in which the last study has been received. Price changes must be announced by Interconnection at least two months before the issue of a new study. In case of not-cancellation the subscription extends for a further year automatically.

Package prices in regard of scale of discounts.

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Please choose between Subscription*
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- **Info-Hotline**: answering of questions with regards to the report and on methodological issues relating to market research
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Our Tools to Increase Your Profits



Our Ad-hoc research team disposes state of the art market intelligence tools to:

- analyze potential to increase turnover and profits
- provide an insight about customers needs and opinions
- Identify new promising markets and business segments
- Optimize your pricing strategies taking customer benefits and the competitive landscape into account
- Etc.



Selected References



If there are any questions please
do not hesitate to contact us!

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Yes, we would like to order the IC Market Tracking® Coffee – Away-from-Home Europe 2020

(Please, print out the order form and mark your desired products)

1. HO.RE.CA Market

Please choose from the available countries

- | | | |
|----------------------------------|----------------------------------|-----------------------------------|
| <input type="checkbox"/> Germany | <input type="checkbox"/> Italy | <input type="checkbox"/> Austria |
| <input type="checkbox"/> Hungary | <input type="checkbox"/> Croatia | <input type="checkbox"/> Slovenia |

Subscription* EUR 3.500.- / Country

Subscription* EUR 9.950.- / All 6 Countries

2. Total Away-from-Home (including HO.RE.CA and Non-Commercial Coffee Market)

Please choose from the available countries

- | | |
|----------------------------------|--------------------------------|
| <input type="checkbox"/> Germany | <input type="checkbox"/> Italy |
|----------------------------------|--------------------------------|

Subscription* EUR 4.950.- / Country

3. Package

HO.RE.CA Market in All 6 countries & Away-from-Home in 2 Countries (Germany & Italy)

Subscription* EUR 11.999.- / All Countries

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Laszlo Barla – barla@interconnectionconsulting.com – Tel.: +43 1 585 46 23 - 68

| | Single Issue | Subscription* |
|---|--------------|---------------|
| 20% price advantage | | ✓ |
| IC Cockpit – Online Dashboard Solution | ✓ | ✓ |
| Interactive PDF | ✓ | ✓ |
| Full Flexibility – Within the sum of the subscription available country reports can be changed without any additional costs | | ✓ |
| Web-Conference with the analyst free of charge | | ✓ |

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