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IC Market Tracking[®]

Coffee in the HORECA Business 2017

Offer 2017

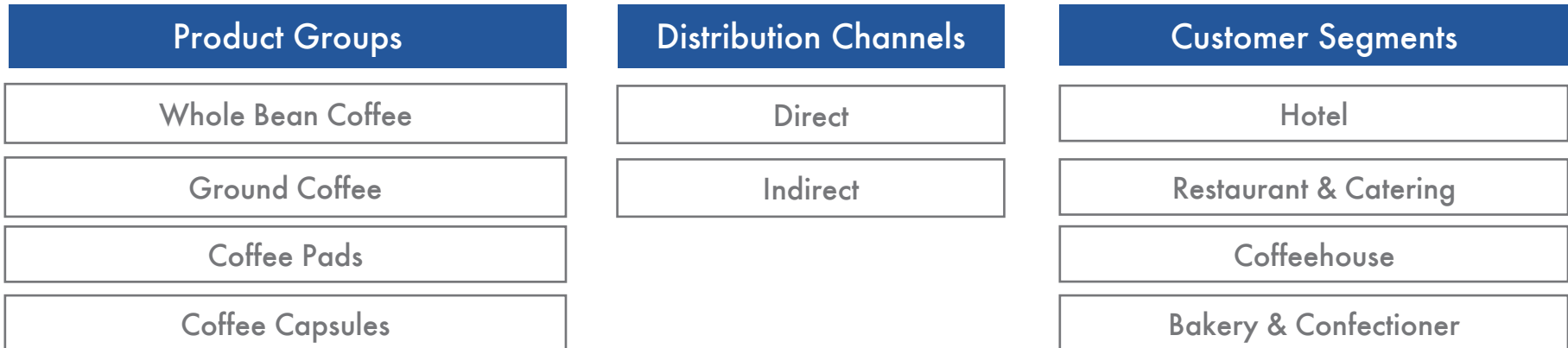
Benefit	Page 03
Market Structure	Page 04
Methodology	Page 06
Content of the Report	Page 09
Examples	Page 10
Prices	Page 16
About Us	Page 18
References	Page 20
Contact	Page 21
Factsheet	Page 22

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 year
- ✓ Awareness of **Market Position** and development during the last two years, in comp respect to:
 - Total Market
 - Regional Markets
 - Product Groups
- ✓ Information about the most important **Factors of Influence**
- ✓ **Graphic Presentation** of the results facilitates the development of your own strateg



Coffee in the HORECA Business 2017



For each segment the total market and market shares of the top players for the last two years and forecasts for the next three years are available in the study

Definition and Demarcation

Categories

Product Groups

Whole Bean Coffee

Ground Coffee

Coffee Pads

Coffee Capsules

Customer Segments

Hotel

Restaurant & Catering

Coffeehouse

Bakery & Confectioner

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

Quantity is stated in tons

Whole bean roasted coffee

Roasted and ground coffee beans

Instant powder coffee in water-permeable bag (usually about 7g)

Aroma sealed coffee for one portion of coffee in a loose or pressed state



Hotel / Bed & Breakfast Place / Guesthouse

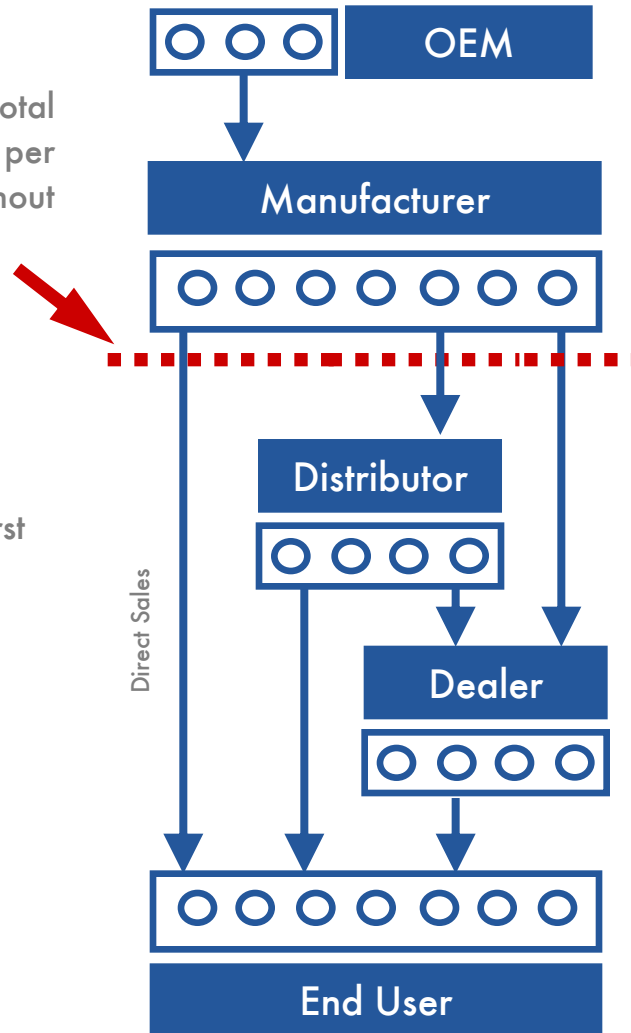
Restaurant / Bar / Pub / Eventcatering / Care Catering

Coffeehouse / Coffee Shop / Cafè

Backery / Confectioner

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.



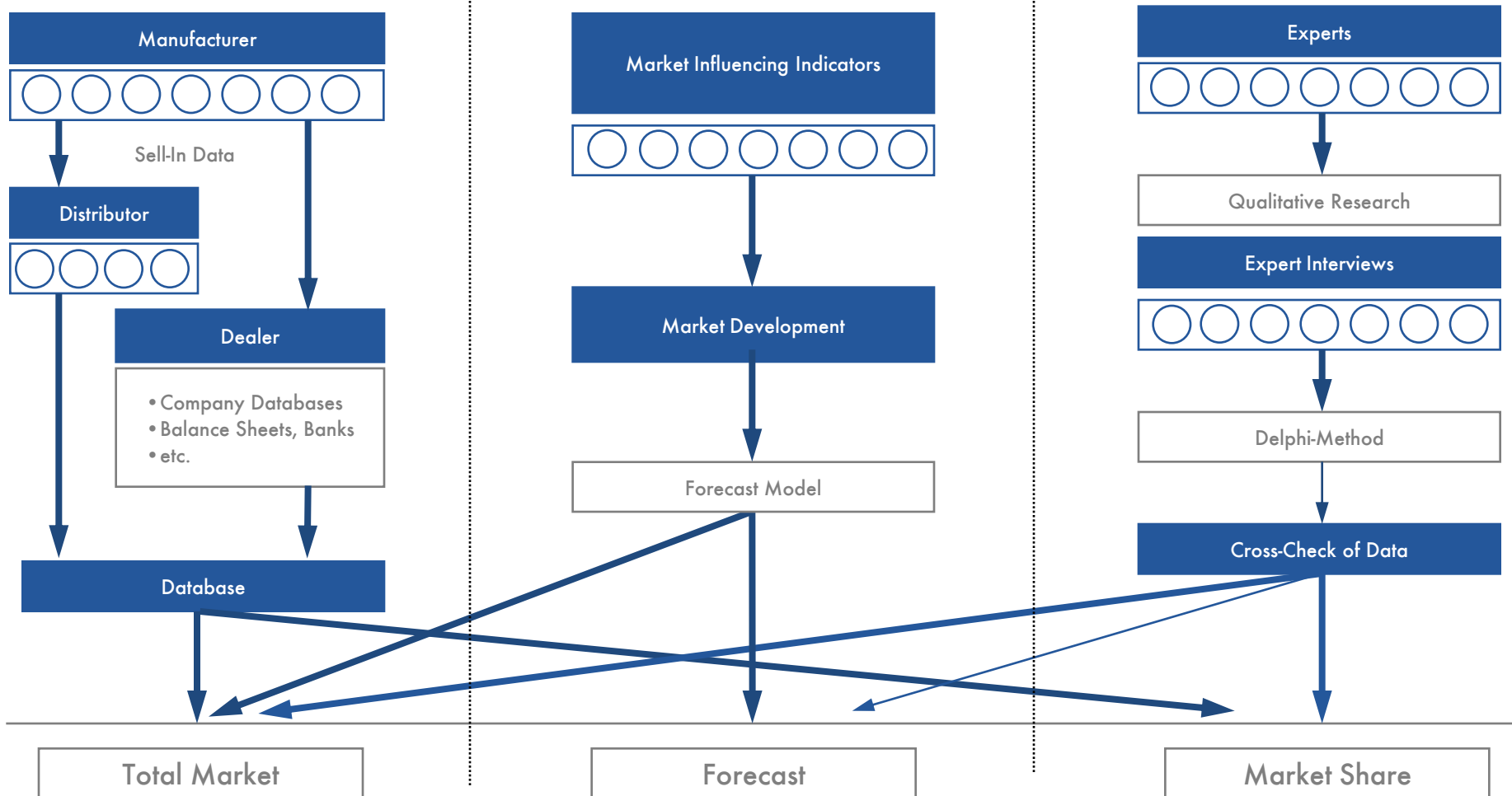
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

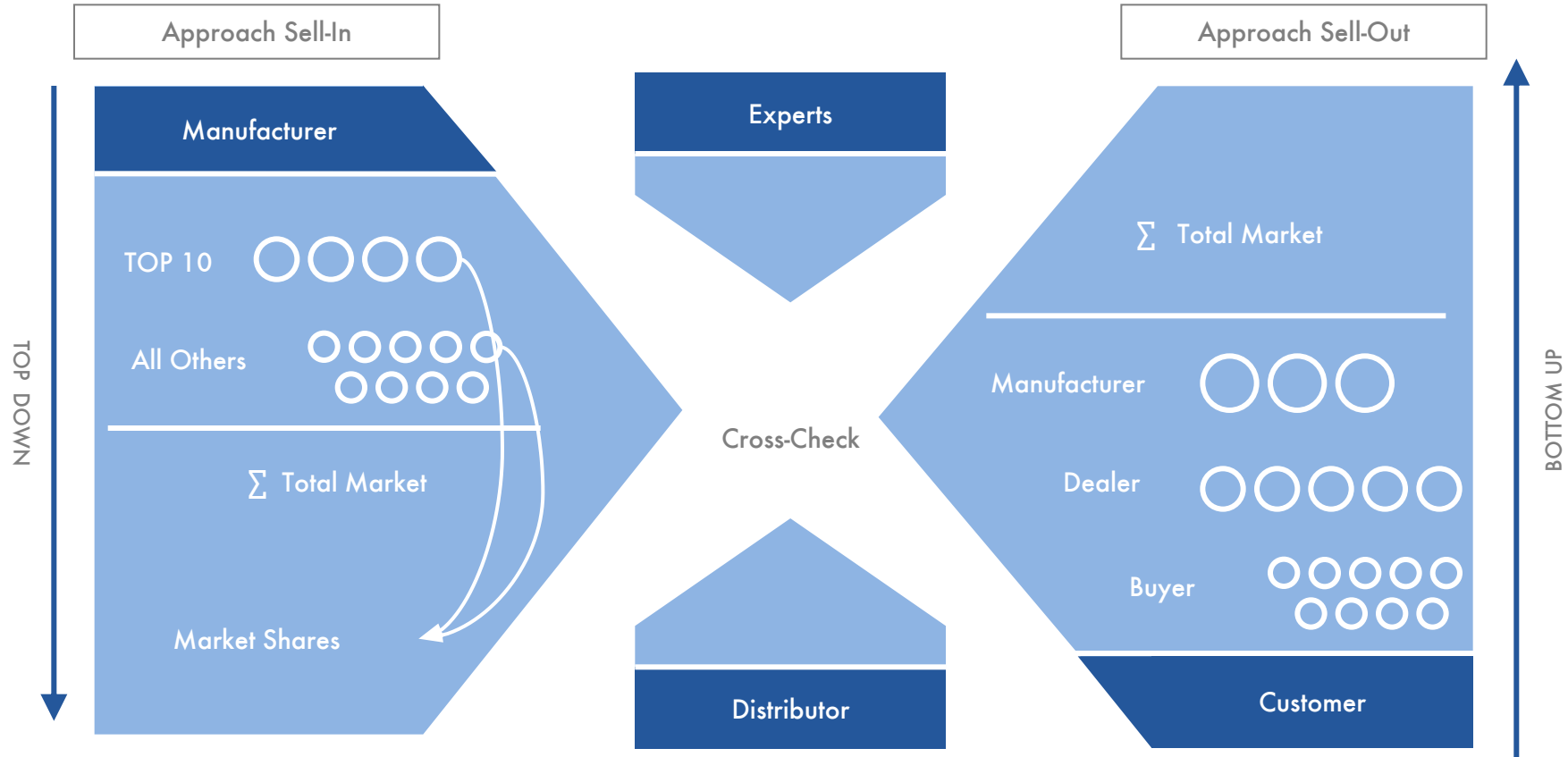
Methodology



Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Methodology



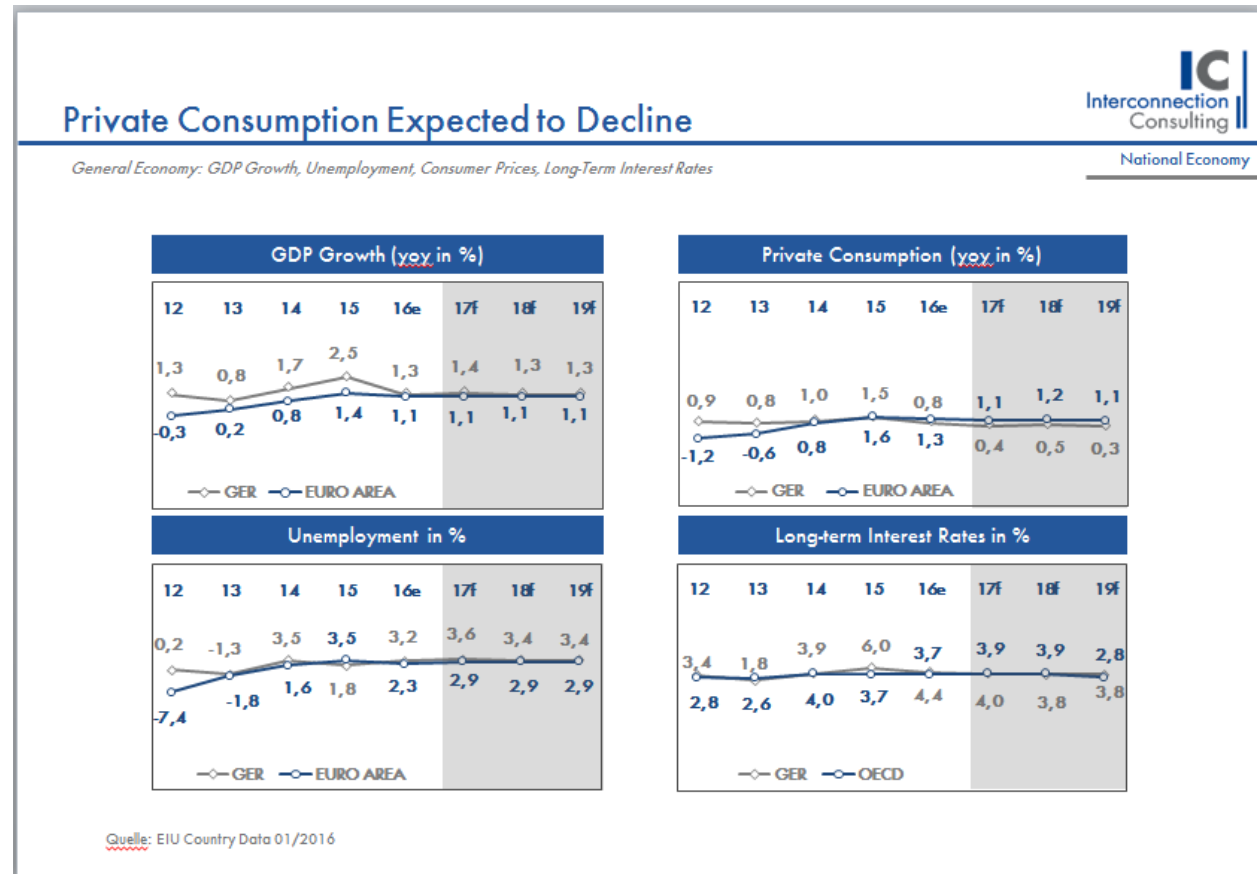
Contents of the IC Market Tracking®

The IC Market Tracking® is modularly built and consists of the following sections:

- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market are analyzed in the **Economic Environment**: You will find the most important data on main economic indicators, etc.
- The **Total Market Analysis** shows the development of the market surveyed by value and quantity in different dimensions, such as regions, product groups, and ways of distribution. A forecast for the next years is an essential part of this analysis.
- The **Competition Analysis** shows in detail the development of the top companies in the market by finding out about the market shares in different categories, changes in market position, benchmarks, average prices, etc.
- Finally, all data are documented in the table section, also called **Facts & Figures**. Here you will find all absolute and relative sales figures of the top companies in order to check our results. Company profiles provide you with further practical information on the main companies in the market.

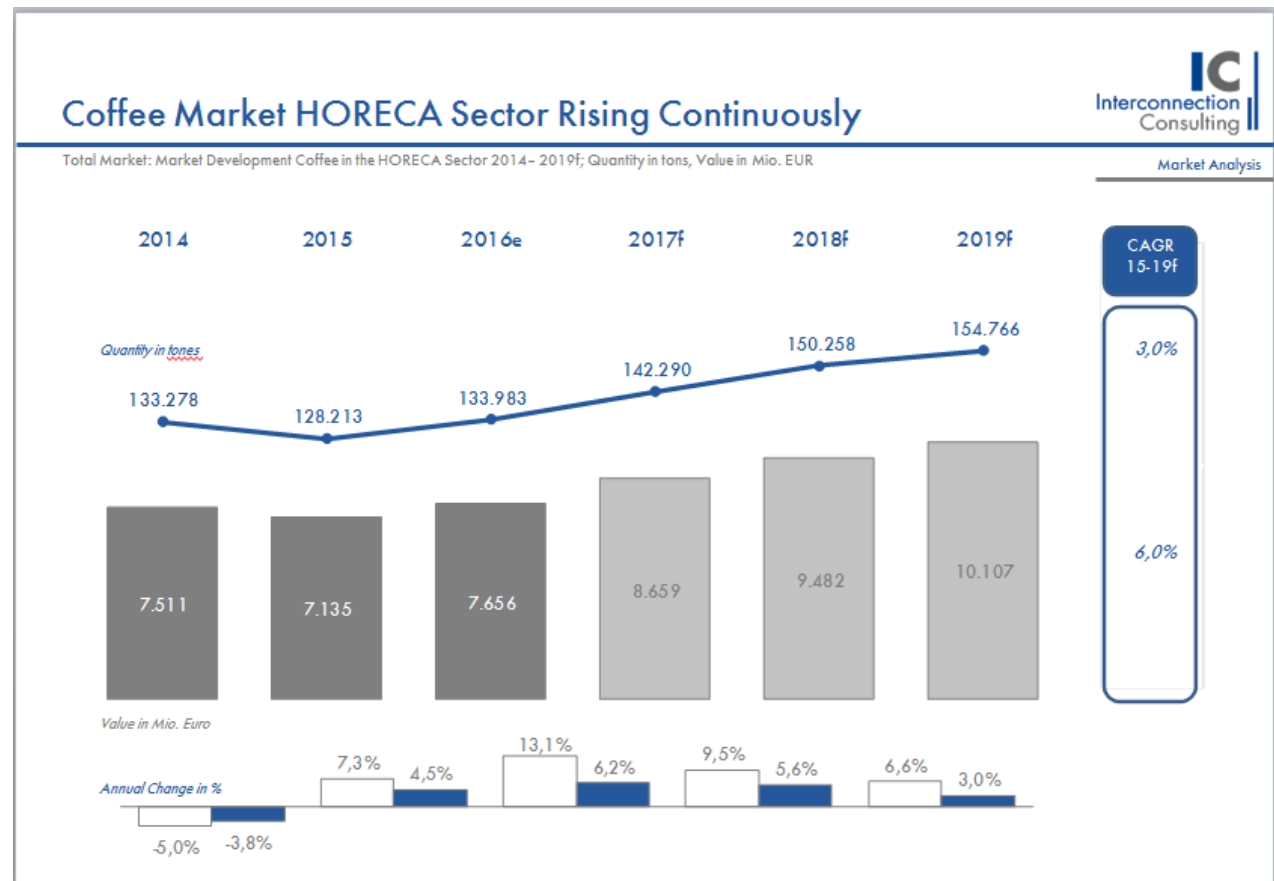
Market Environment Data of our Forecasting Model

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



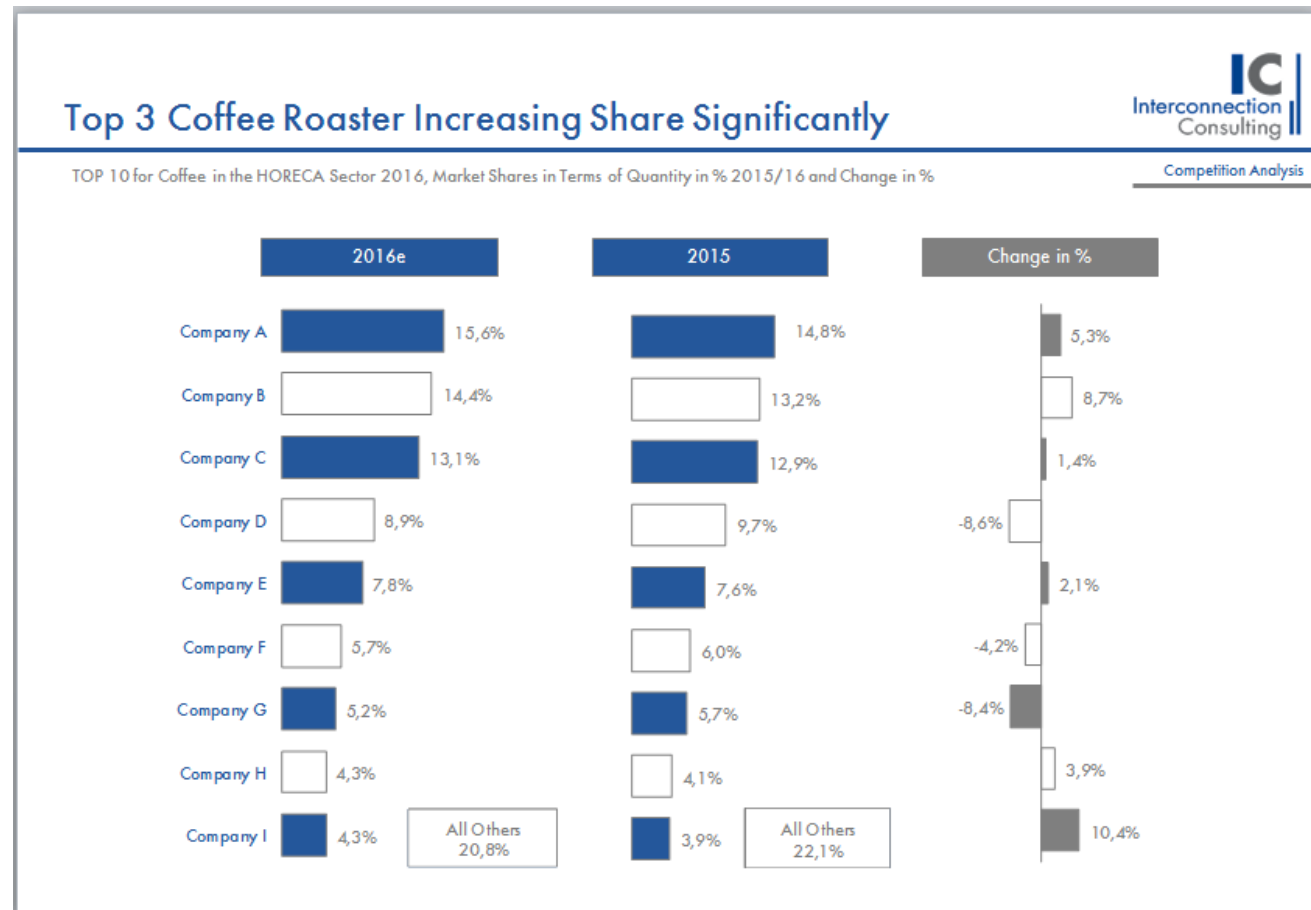
Total Market Development and Forecast

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



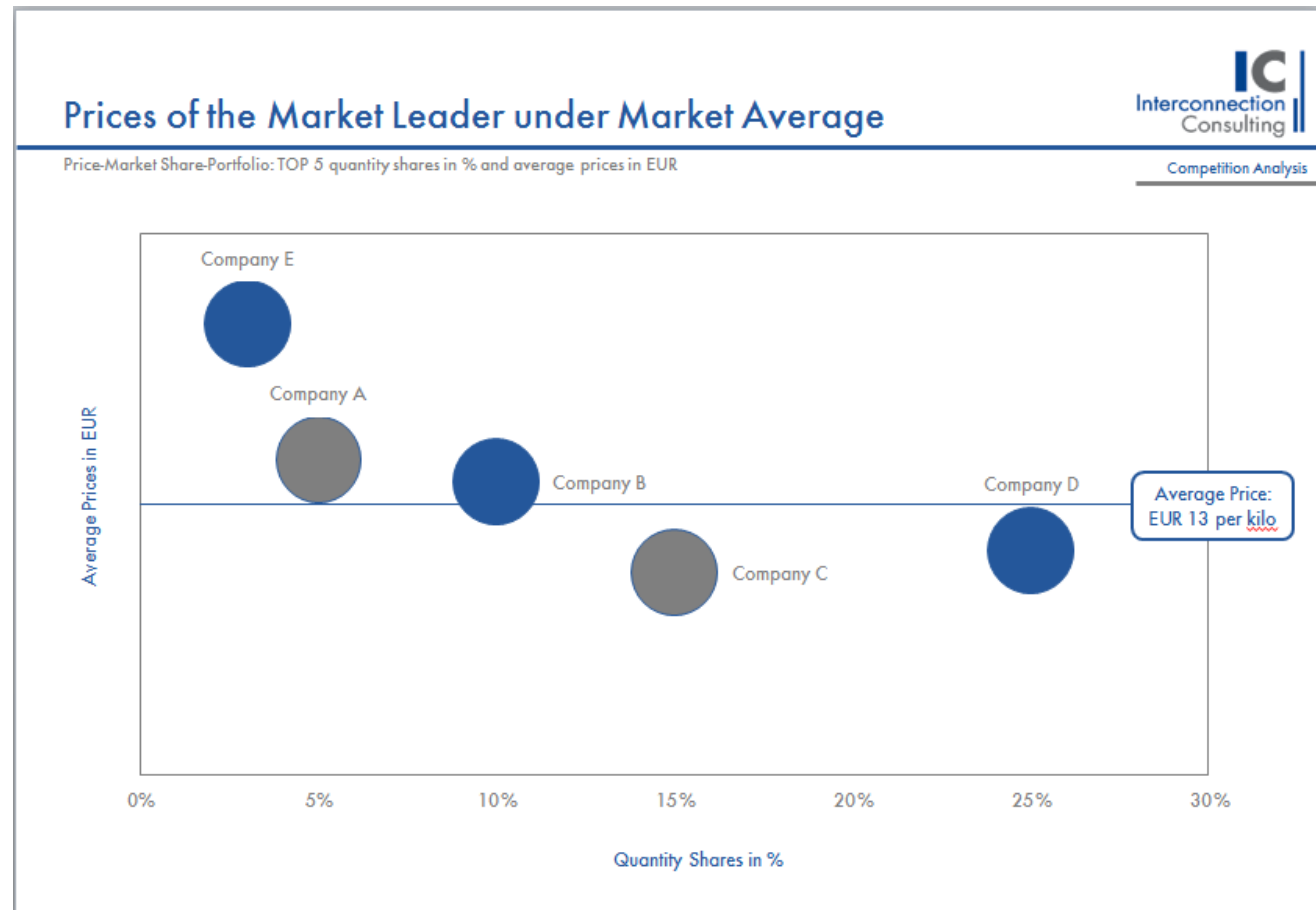
Competition Analysis and Market Shares

- Market Shares of the Top 10 market leaders for the total market as well as product groups and segments.
- This chart shows sample figures.



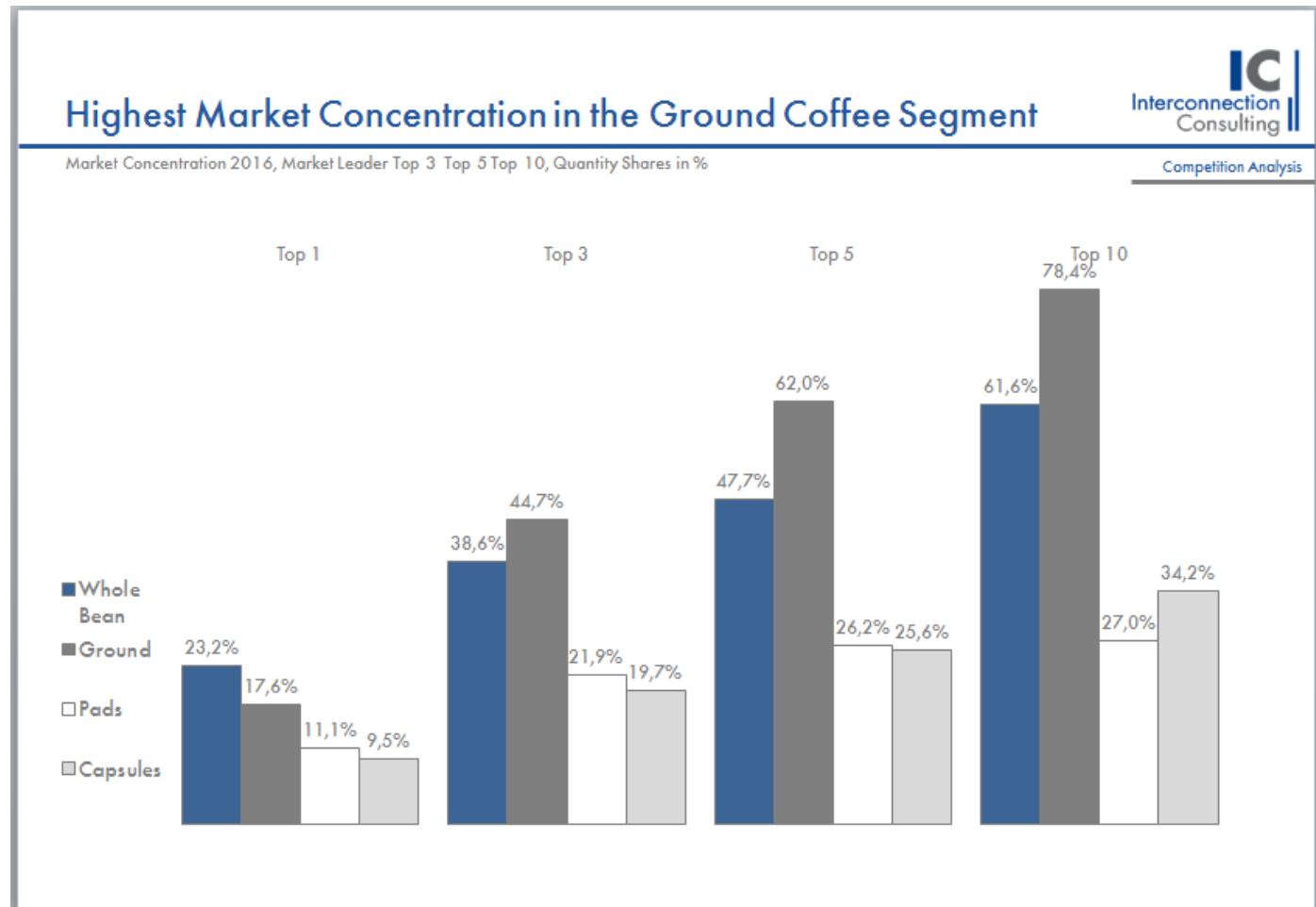
Strategic Analysis of Product Groups and Segments

- Dynamic Portfolios for a strategic analysis of the market and segments.
- This chart shows sample figures.



Market Concentration

- Market Development Market Leader, Top3, Top10 Companies
- This chart shows sample figures.



- Additionally to the visualized report a Pivot Table will be included
- With use of the analyze tool you can individually make selections of the available data to make comparisons of the development on years and segments by your own.
- Pivot tables are available for the competition analysis as well as for the total market and forecasts.

How to use Pivot Tables

1. Generally, the desired sub-categories (i.e. Technology - A) can be selected with the ordinary drop down menus.

Technology	A
Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	
Segments	Results
Segment A	18.592
Segment B	8.434
Segment C	5.310
Segment D	3.290
Segment E	1.332
Total	36.958

2. If you want to analyse a different category (i.e. Technology), click on the gray field and drag it down to the table.

Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	Technology		
Segments	A	B	C
Segment A	3.290	5.452	7
Segment B	5.310	8.925	21
Segment C	8.434	10.794	
Segment D	18.592	14.624	13
Segment E	1.332	2.229	6
Total	36.958	42.025	47

IC Market Tracking[®] Coffee in the HORECA Business 2017

	Single Issue	Subscription *	Scale of Discounts from a buying price of	
Europe Total**	€ 9.950,-		€ 5.000	-10%
Single Country	€ 3.950,-		€ 7.500	-20%
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			Austria	
			Croatia	

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Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the catering and gastronomy industry.
- Our studies support the leading companies in the determination of targets, definition of marketing strategies, competition monitoring and control of marketing actions.
- Interconnection draws its Know-how from over 100 international market studies per year and a number of Ad-hoc studies in the catering industry.
- Next to market data we offer for the catering industry Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.
- Our Consultant supports companies also in the implementation of data in actions = in the development of marketing strategies.



Market Analysis



Market Volume
Market Shares & Entry
Competition Analysis

Distribution



Channel Map
Distribution Matrix
Margins

Customer Insight



Focus Groups
Buying Motives
Customer Benefits

Market Forecasts



Indicator Models
Life Cycle Models
Econometric Analysis

Brand Analysis



Brand Scorecards
Brand - Triangle
Brand Affinity

Customer



Importance/Satisfaction
Portfolios
Customer Loyalty
Customer Typology

Price Research



Price-Sales-Function
Price-Simulation-Tool
Optimal Pricing

Webverstärker



E Commerce Insights
Search Engine Marketing
Web Channel Analysis

Selected References:



For further questions
please do not hesitate to contact us!

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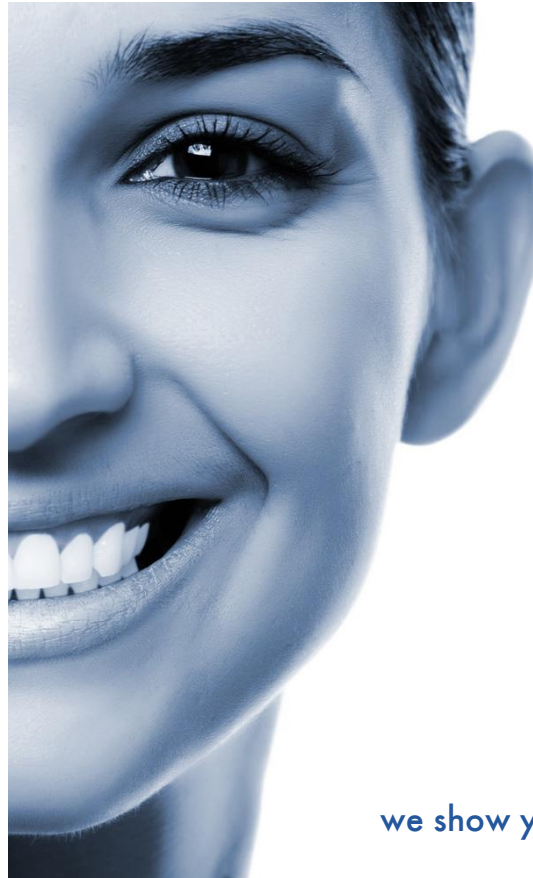
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Factsheet: IC Market-Tracking® Coffee in the HORECA Business 2017

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 70 per country
- Optional: Hard Copy

Price

- per country: 3.950€
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- Click "Buy Now" on the website and make your order with the interactive price calculator.
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Content of the Market Report

Structure of the Study

Language of the report

English

Introduction, Market Structure & Executive Summary

Definition and demarcation of product groups, regions and methodology; summary of study results.

Market Drivers

Key economic factors influencing the market: main economic indicators.

Import & export statistics.

Total Market Analysis

Total market development and forecasts for all market segments in quantity and value by regions, process and business segment.

Competitive Analysis

Market development by value for each region and segment. Market shares of the top manufacturers for each region and for each application for the last two years.

Market Structure

Countries

Germany, Italy, Austria, Hungary, Slovenia, Croatia

Product Groups

Whole Bean Coffee, Ground Coffee, Coffee Pads, Coffee Capsules

Customer Segment

Hotel, Restaurant & Catering, Coffeehouse, Bakery and Confectioner

Methodology

Methodology and Data Sources

The market and competitive analysis is conducted through interviewing the most important manufacturers in the respective industry. All data are cross-checked for plausibility and evaluated by means of additional sources of information.

The market models and forecasts are based on economic indicator models, which are developed individually for each market. The influencing factors are analyzed by means of multivariate regression analysis and updated each year.

The economic indicators and environmental data are a result of secondary research of prestigious statistical institutes and are supplemented by internal market analyses.

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