



IC Market Tracking  
Coffee in the  
HO.RE.CA Sector  
Europe 2019

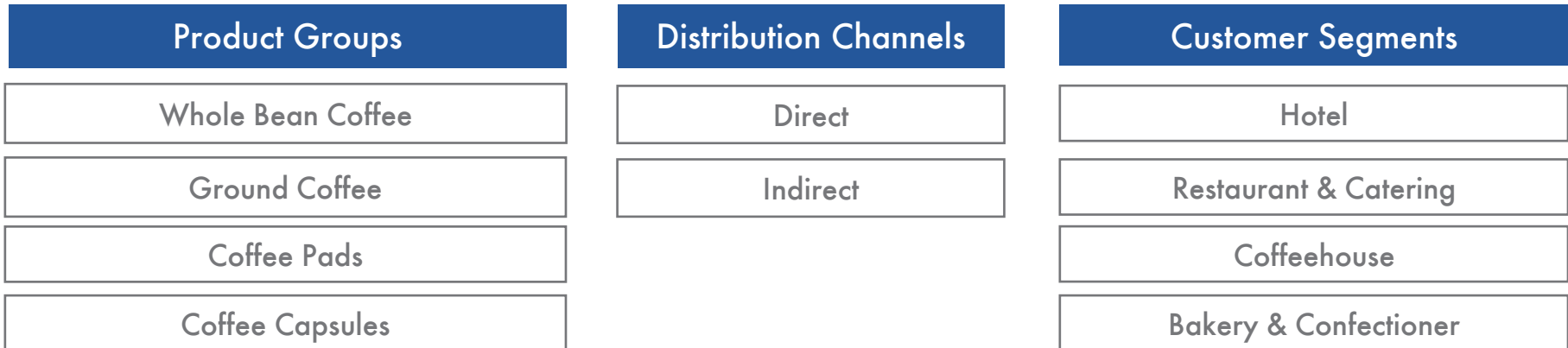
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# Your Benefits at a Glance

- ✓ 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
- ✓ Awareness of **Market Position** and development during the last two years, in comparison 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 strategy



## Coffee in the HO.RE.CA Sector 2019



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

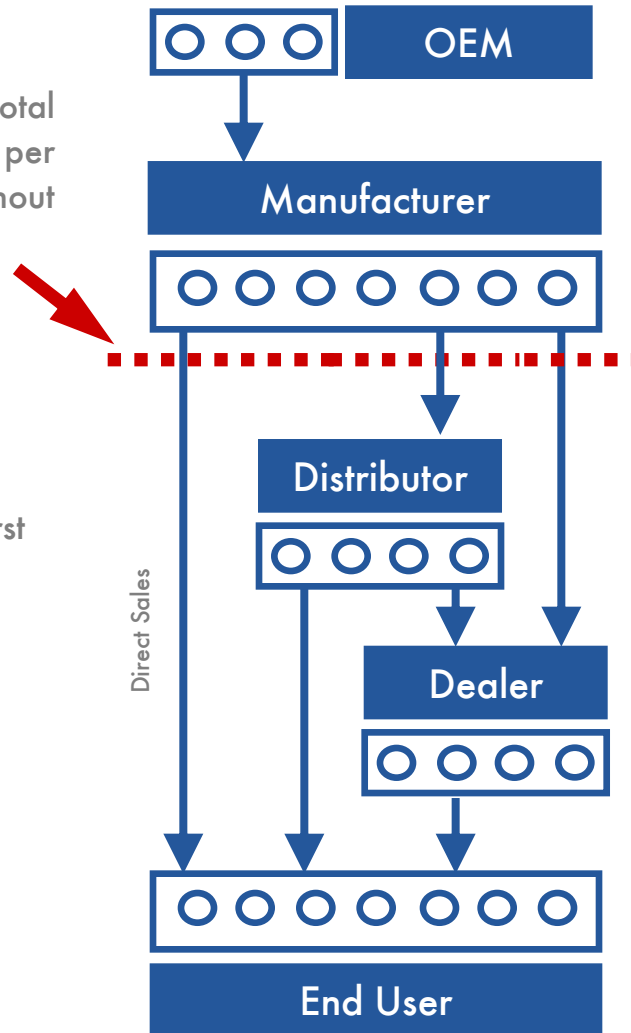
Restaurant / Bar / Pub / Eventcatering / Care Catering

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.



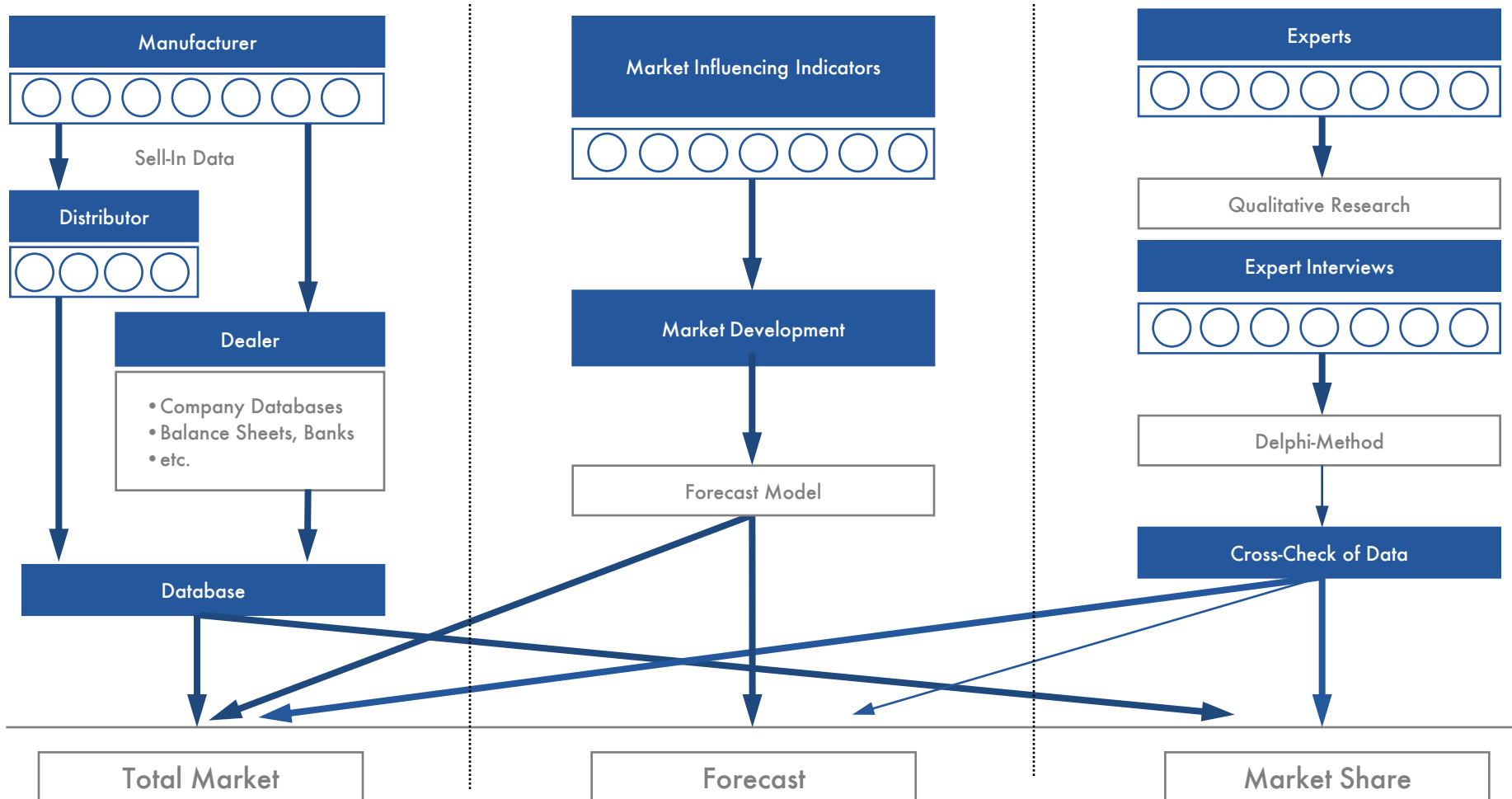
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

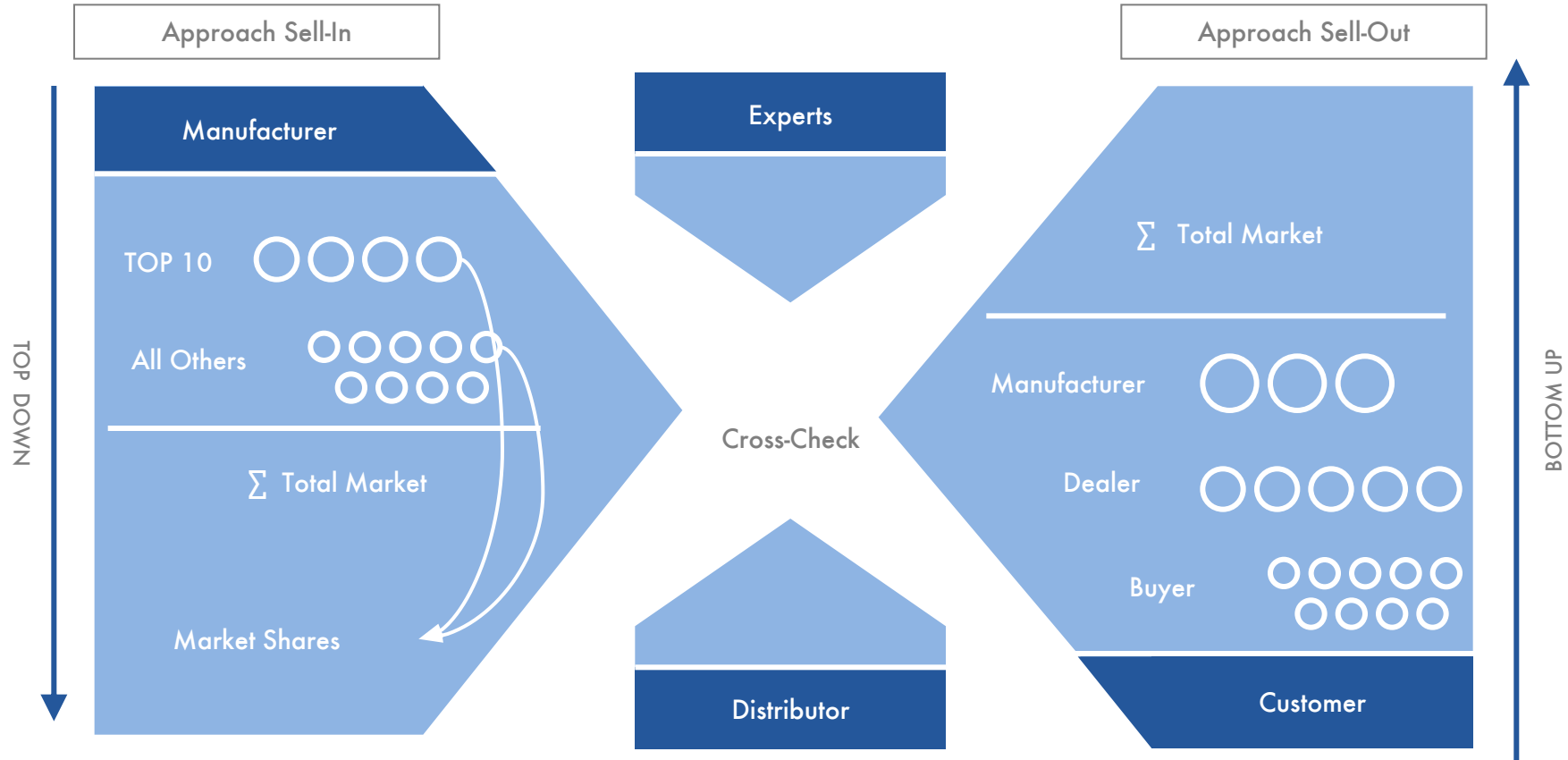
Methodology



# Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

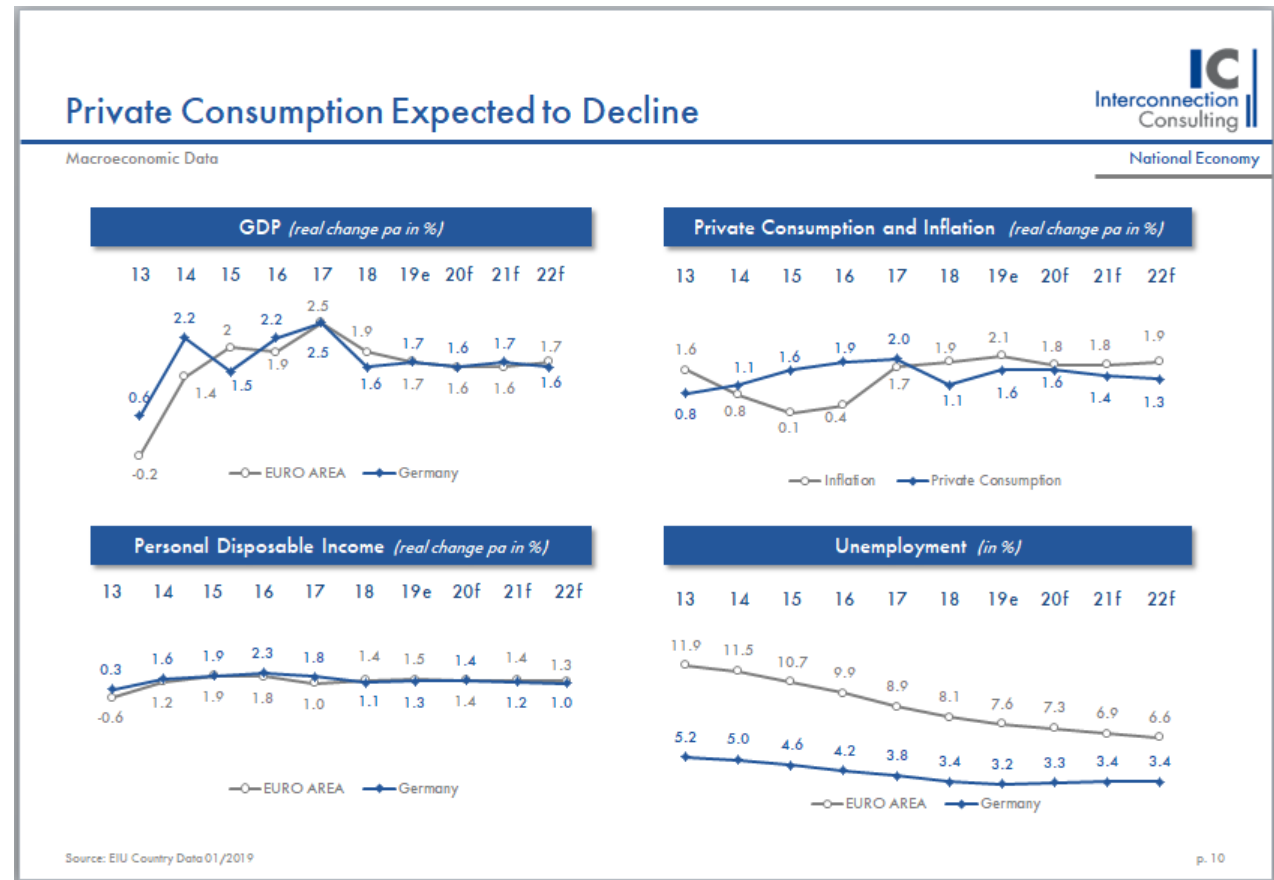
Methodology





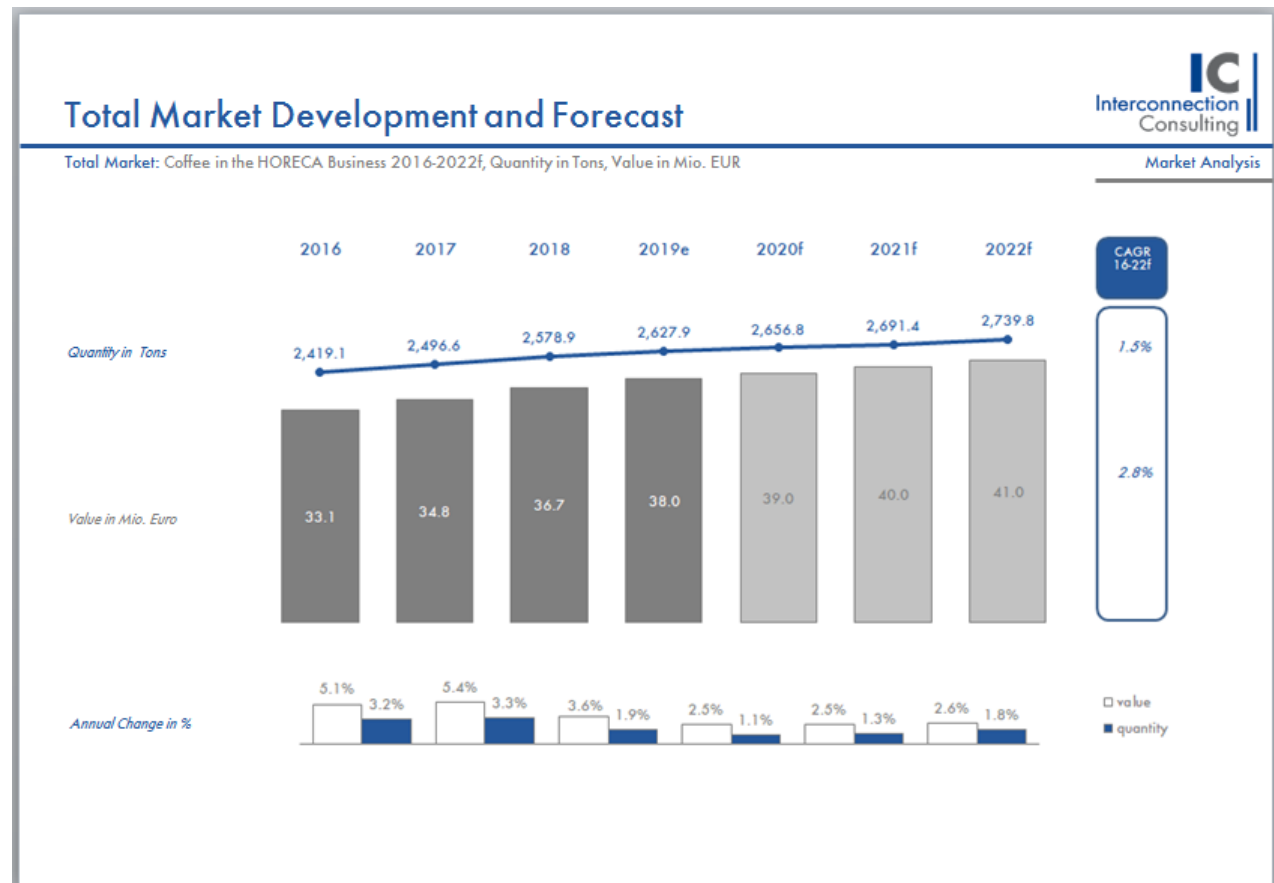
# Market Environment Data of our Forecasting Model

- 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.



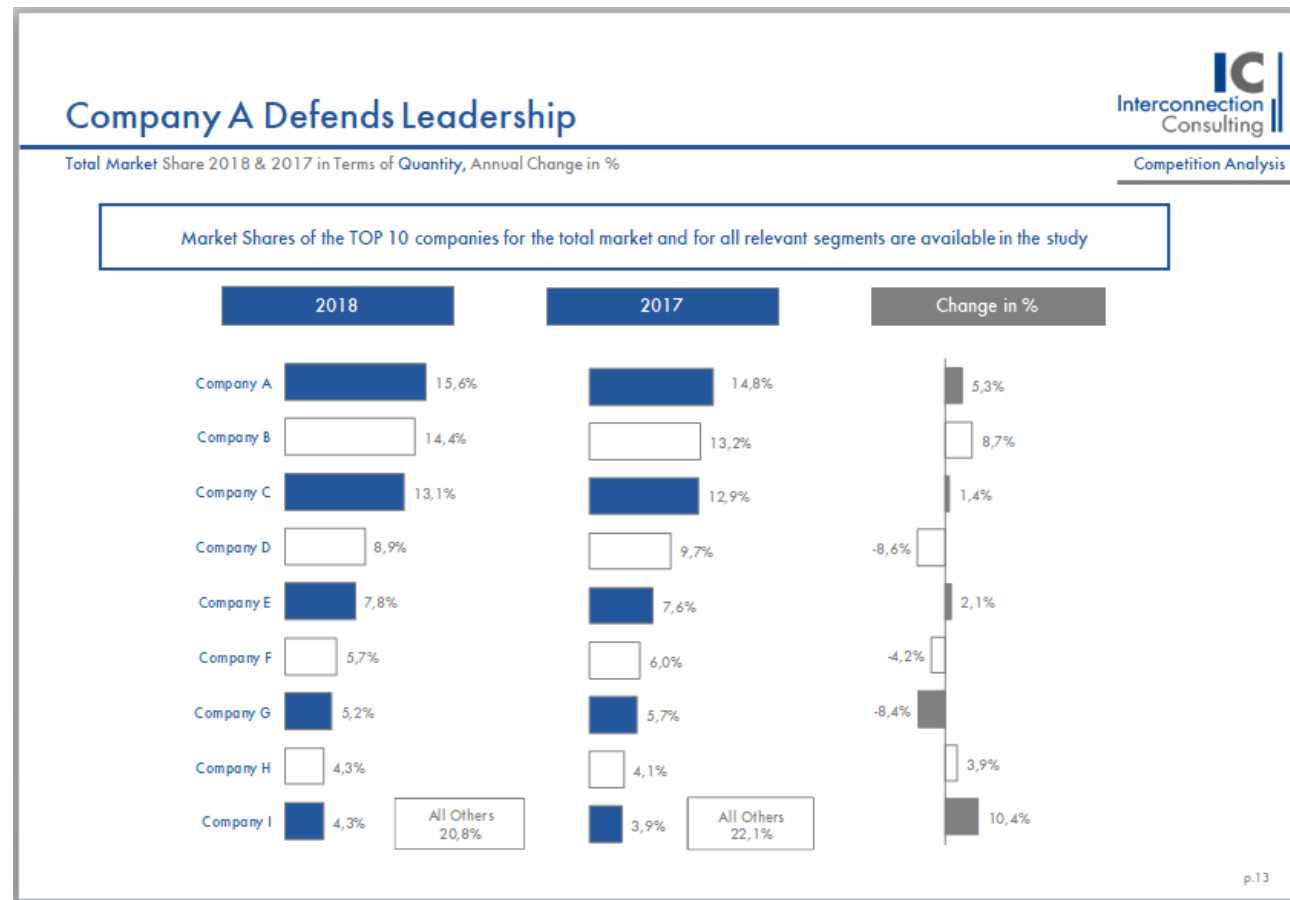
# Total Market Development and Forecast

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



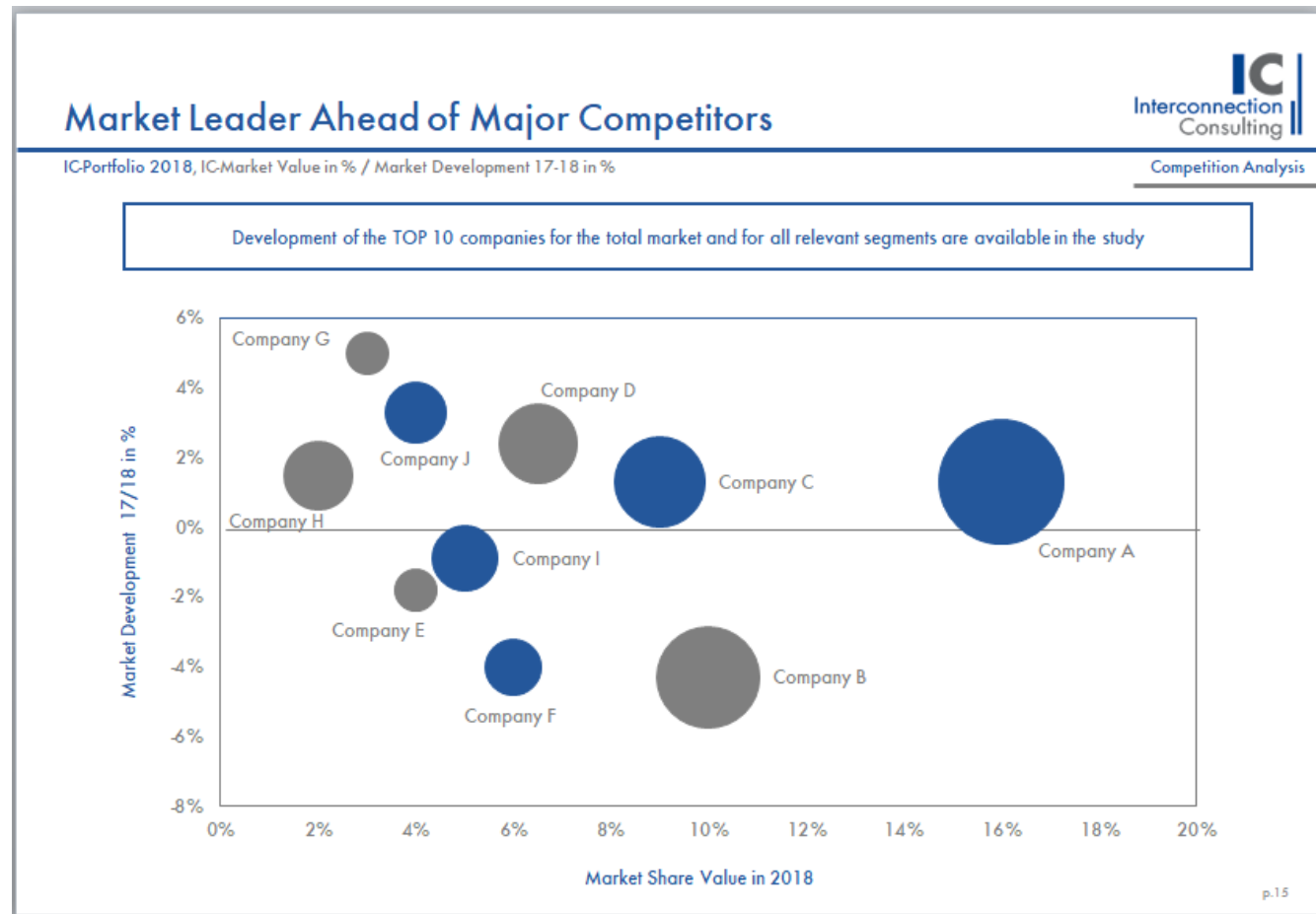
# Competition Analysis and Market Shares

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



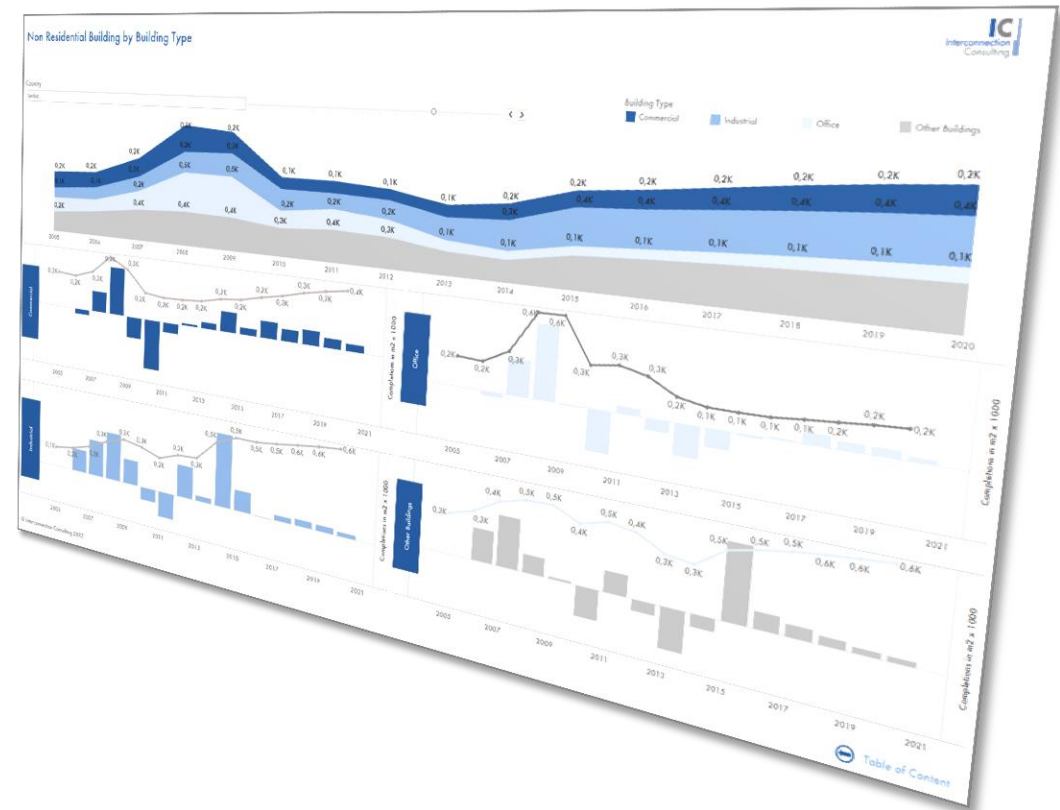
# Strategic Analysis of Product Groups and Segments

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



# 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

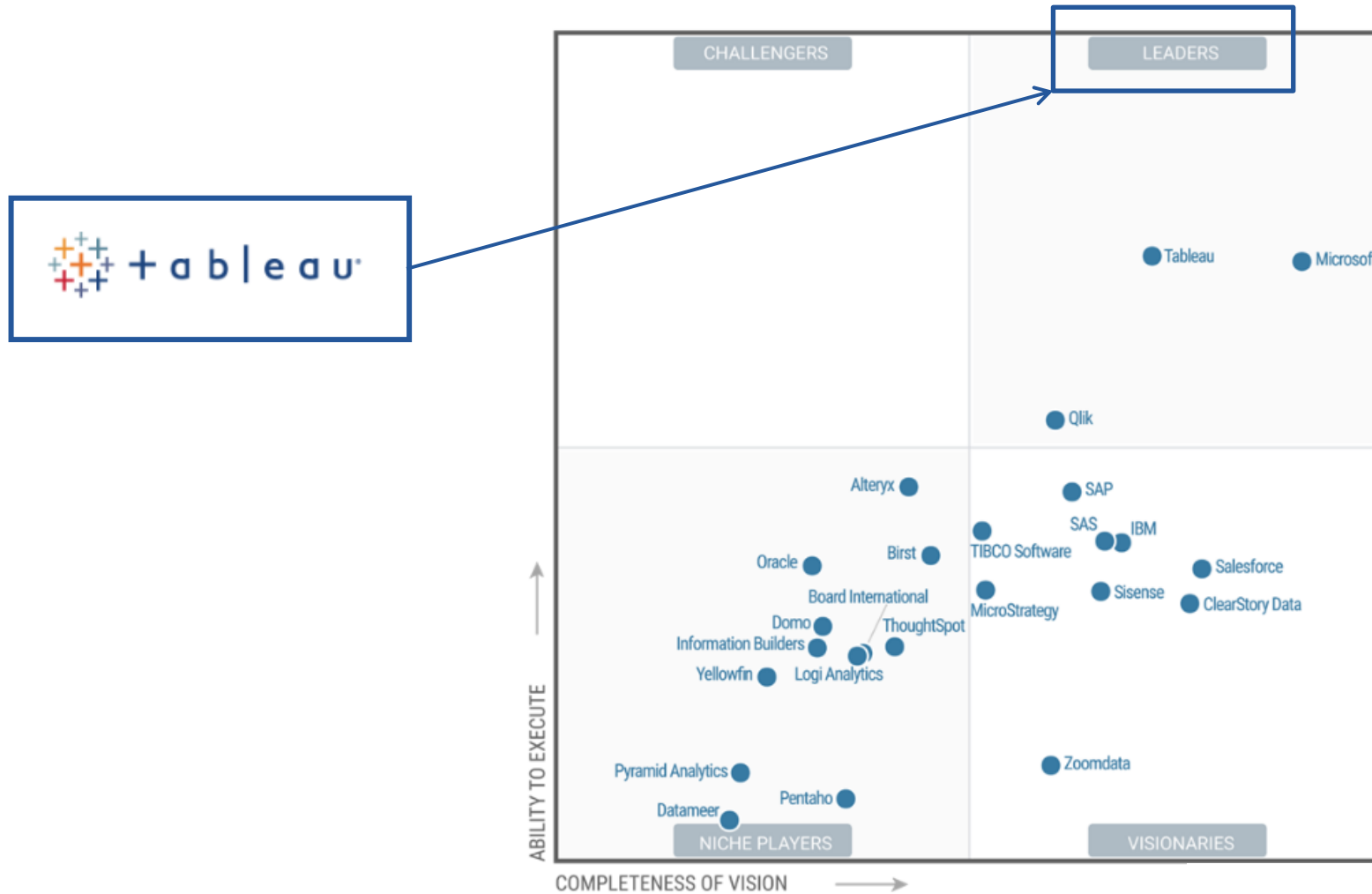
- Use **interactive dashboards** for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.

Easy online accessibility

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



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



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

- 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	<b>A</b>
Distribution	(All)
Quarter	<b>4</b>
Quantity/Value	<b>Quantity</b>
Weight Classes	(All)
Country	<b>Germany</b>
Brand	(All)
∅ Price in € (Classes)	(All)

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

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	<b>4</b>
Quantity/Value	<b>Quantity</b>
Weight Classes	(All)
Country	<b>Germany</b>
Brand	(All)
∅ Price in € (Classes)	(All)

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



<b>Europe Total**</b>	<b>Subscription*</b>	For single issue purchase, please contact the responsible consultant Laszlo Barla <a href="mailto:barla@interconnectionconsulting.com">barla@interconnectionconsulting.com</a> Tel.: +43 1 585 46 - 68	<b>Scale of Discounts</b> from a buying price of					
Single Country	€ 9.950,-		<table border="1"> <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> </table>	€ 5.000	-10%	€ 7.500	-20%	€ 10.000
€ 5.000	-10%							
€ 7.500	-20%							
€ 10.000	-25%							
<b>Available countries</b>	Germany	Italy	Austria					
	Hungary	Slovenia	Croatia					

\* 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.

\*\* Prices with regards of the scale of discounts.

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- **Info-Hotline**: answering of questions with regards to the report and on methodological issues relating to market research
- **Flexible subscription packages**: 2-year intervals, alternating countries, product change, etc., if possible. Conditions on request
- **Easy termination**: After 2 issues each subscription can be terminated easily

# 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!

## Interconnection Consulting

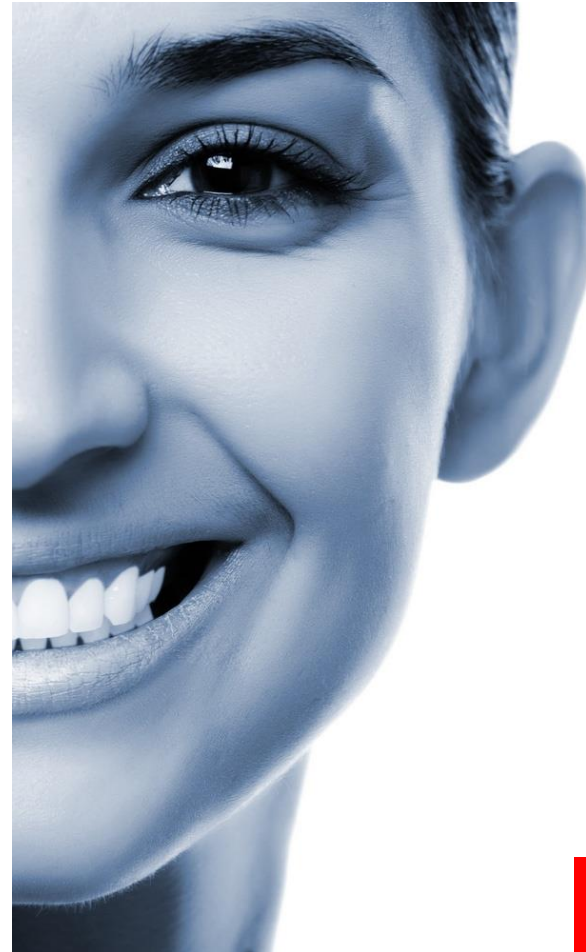
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Inquiry

## Yes, we would like to order the IC Market Tracking® Coffee in the HO.RE.CA Sector 2019

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

Please choose from the available countries

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

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Interactive PDF	✓	✓
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Web-Conference with the analyst free of charge		✓

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