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# IC Market Tracking<sup>®</sup>

## Coffee in the HORECA Sector Latin America 2017

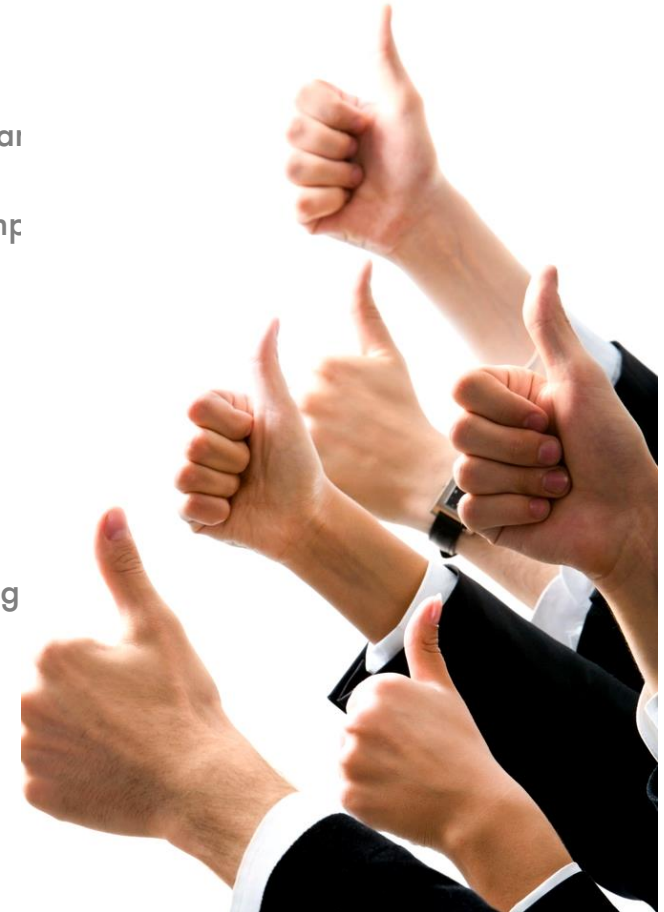
Offer 2017

# IC Market Tracking<sup>®</sup> Coffee in the HORECA Sector Latin America 2017

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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 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 Sector 2017

Argentina	Brazil	Chile	Colombia
Ecuador	Mexico	Peru	Venezuela



Product Groups
Whole Bean Coffee
Ground Coffee
Coffee Pads
Coffee Capsules

Distribution Channels
Direct
Indirect

Customer Segments
Hotel
Restaurant & Catering
Coffeehouse
Bakery & Confectioner

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

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

Quantity is stated in tons

## Product Groups

Whole Bean Coffee

Whole bean roasted coffee

Ground Coffee

Roasted and ground coffee beans

Coffee Pads

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

Coffee Capsules

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



## Customer Segments

Hotel

Hotel / Bed & Breakfast Place / Guesthouse

Restaurant & Catering

Restaurant / Bar / Pub / Eventcatering / Care Catering

Coffeehouse

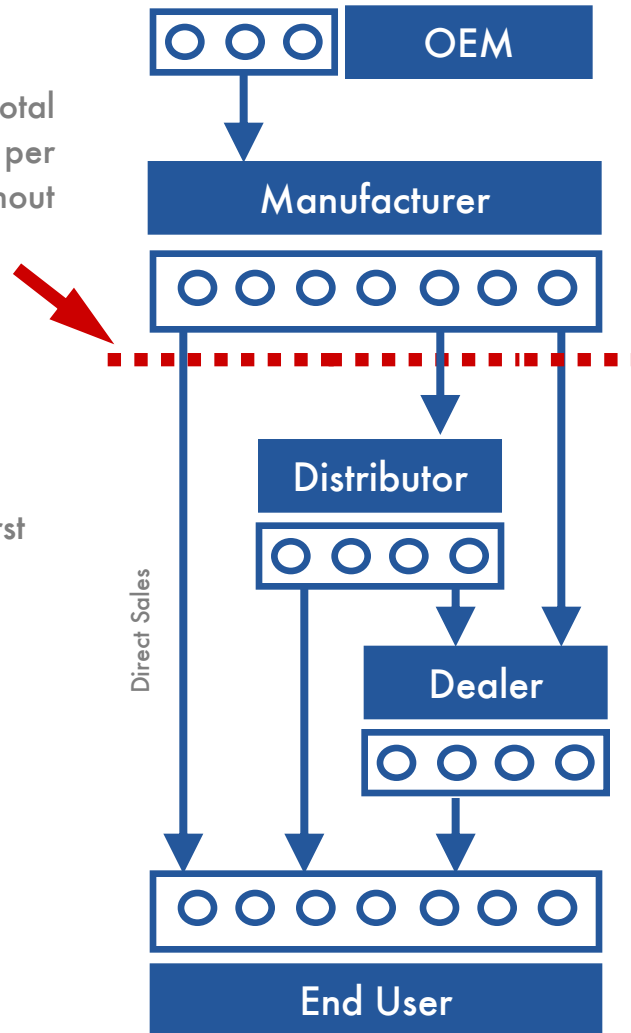
Coffeehouse / Coffee Shop / Cafè

Bakery & Confectioner

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.



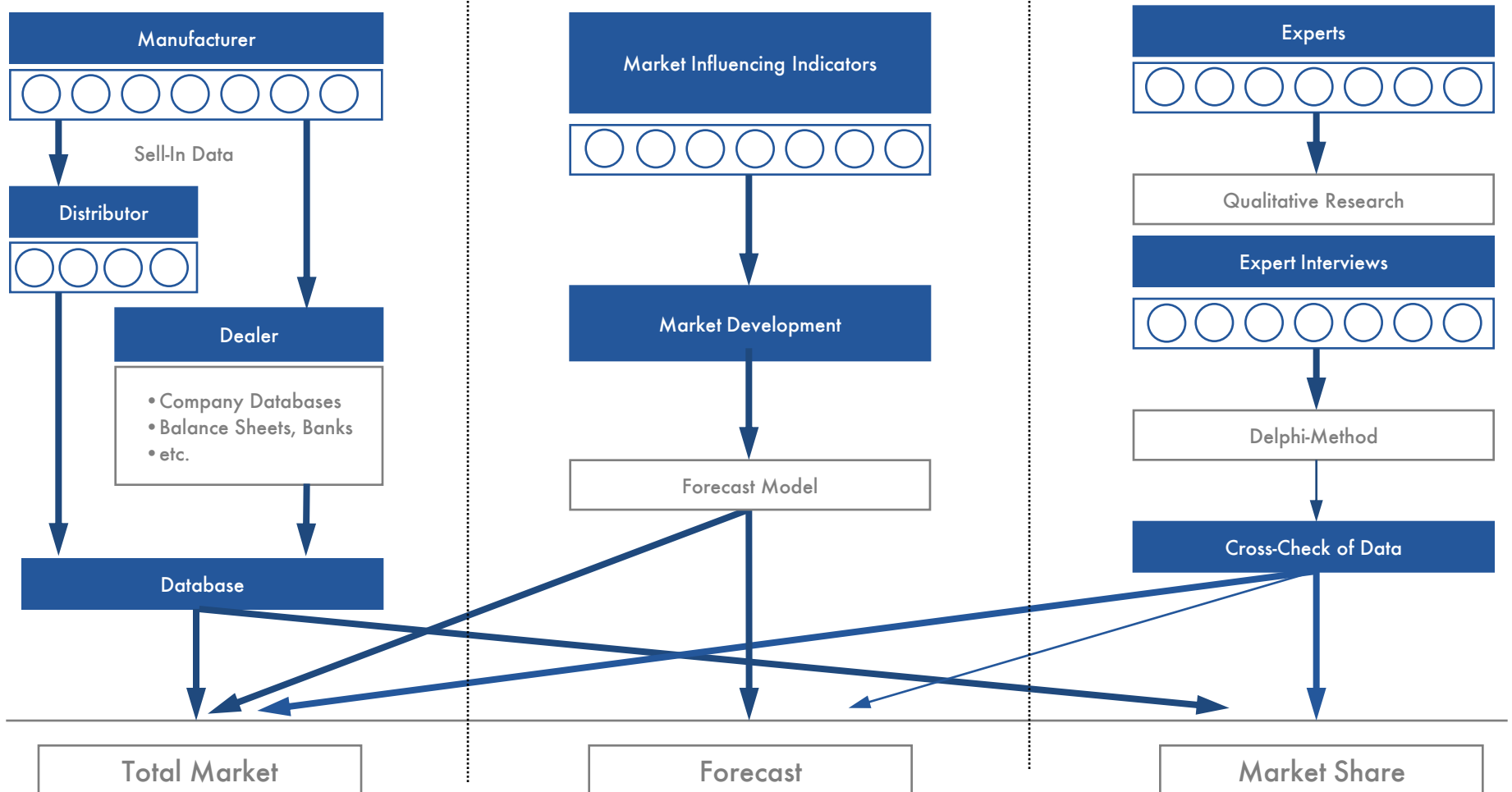
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

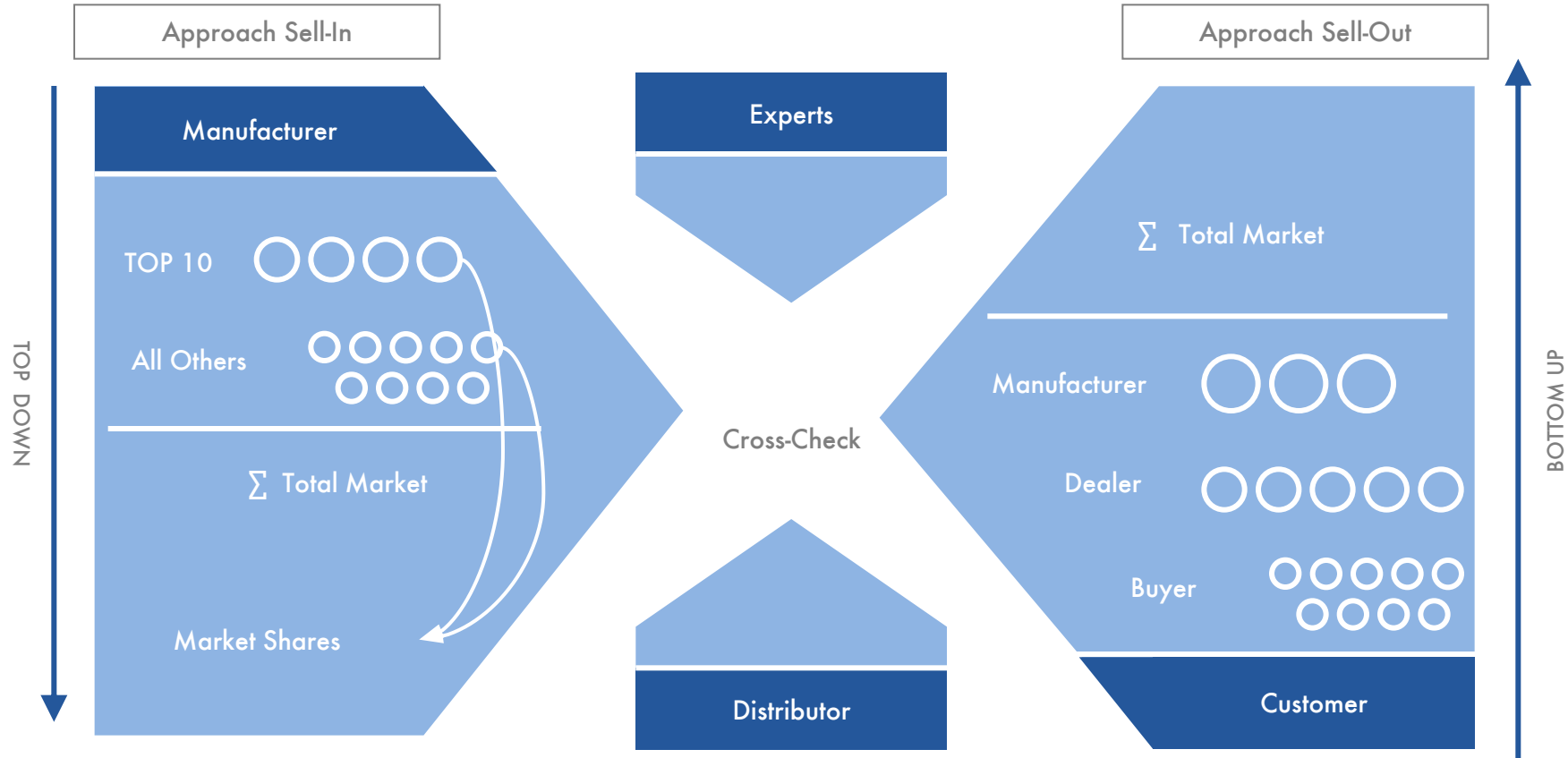
Methodology



# Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Methodology





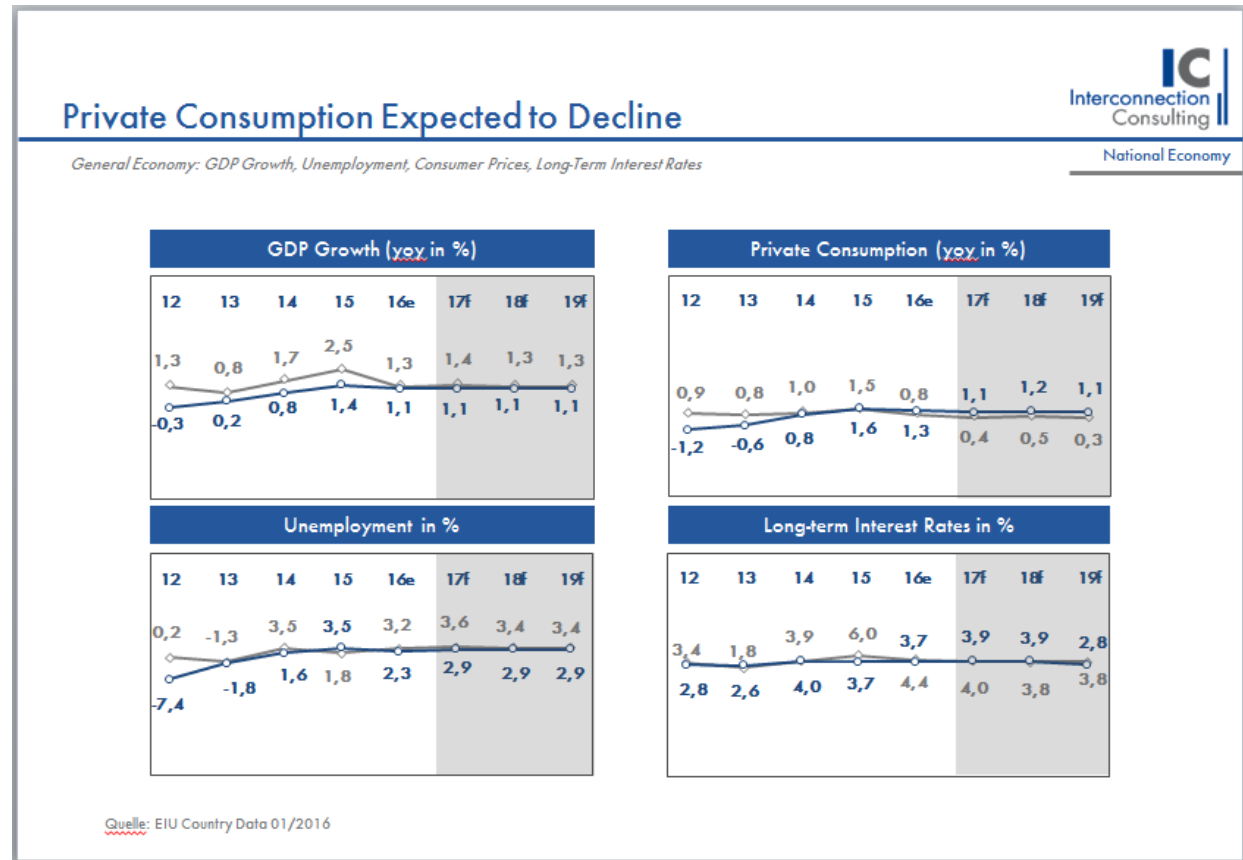
# Contents of the IC Market Tracking®

*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.

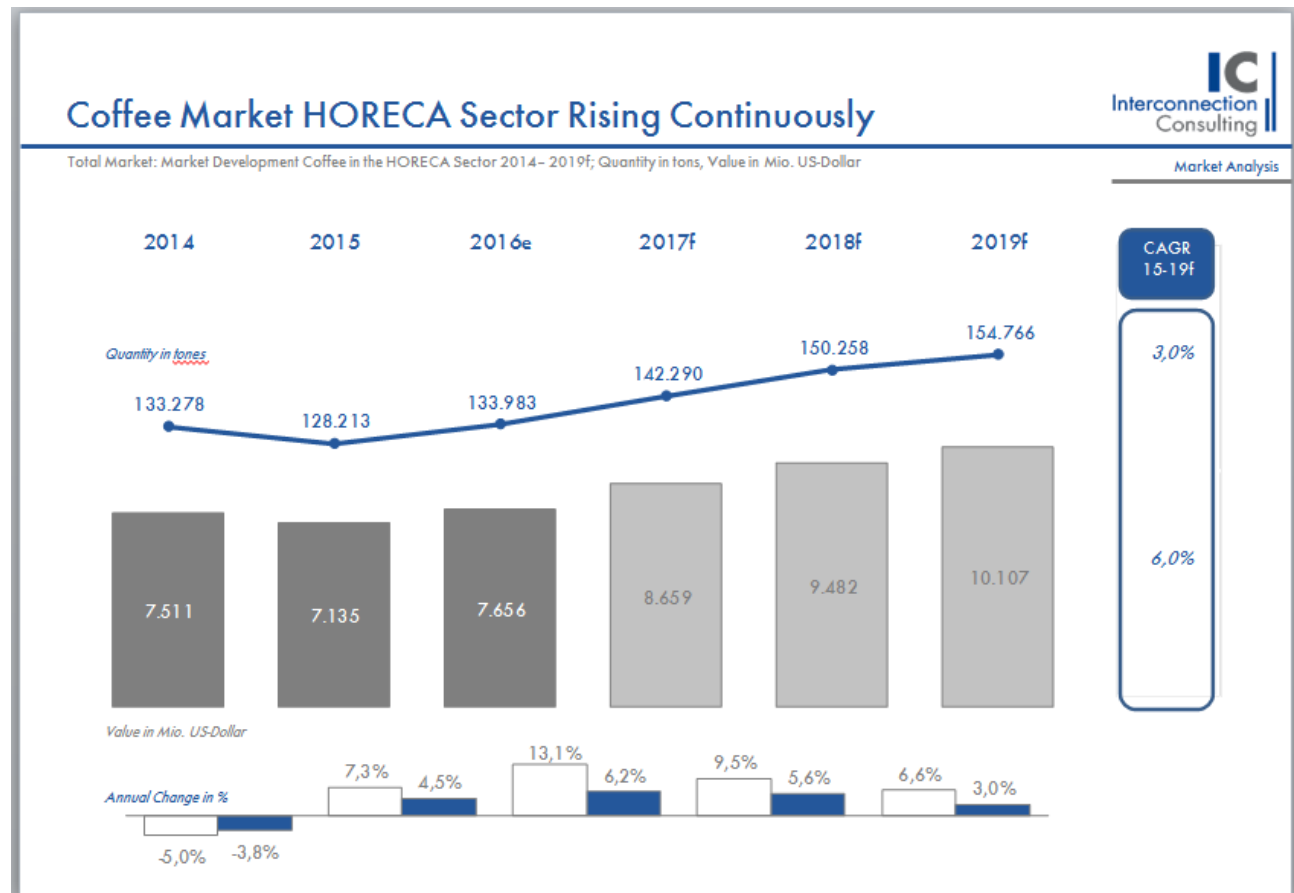
# Market Environment Data of our Forecasting Model

- 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.



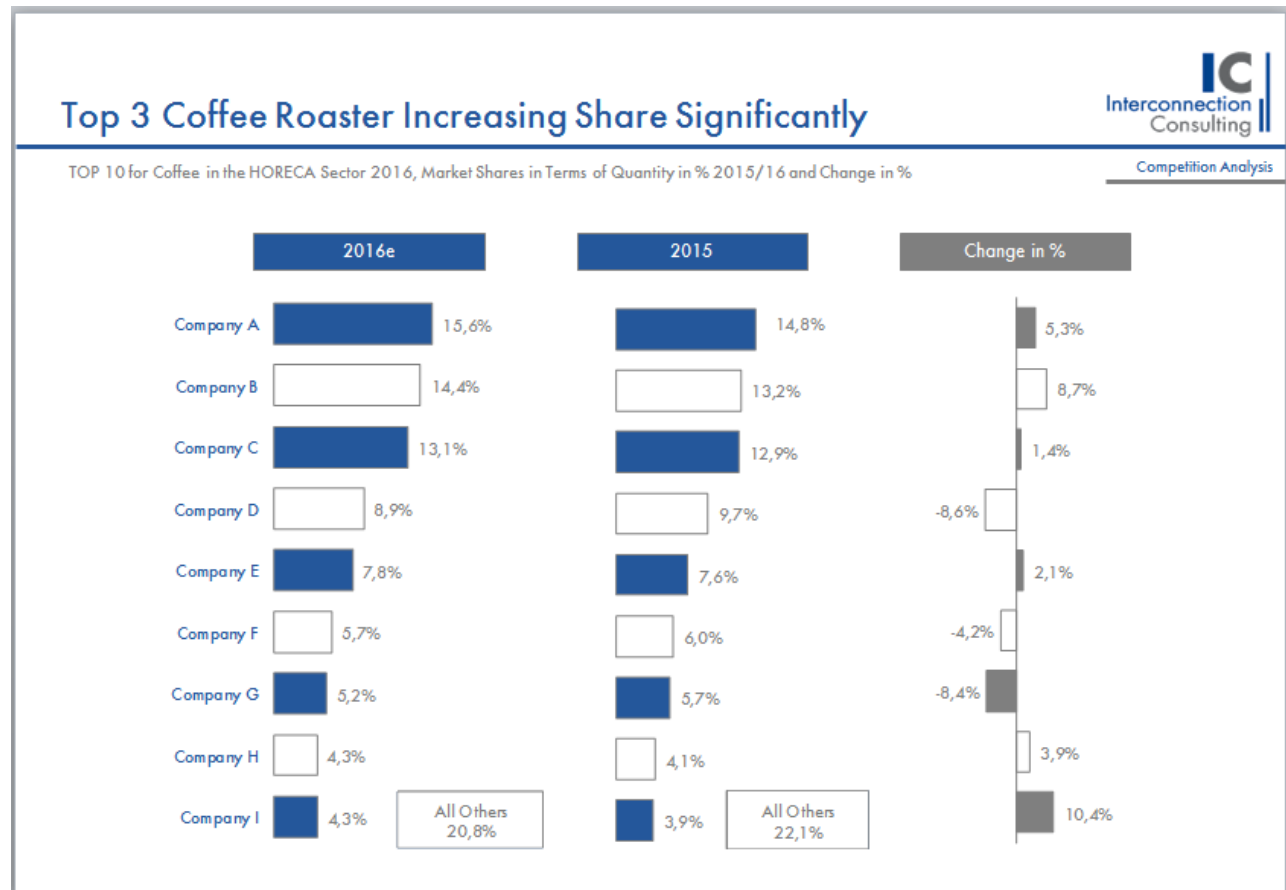
# Total Market Development and Forecast

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



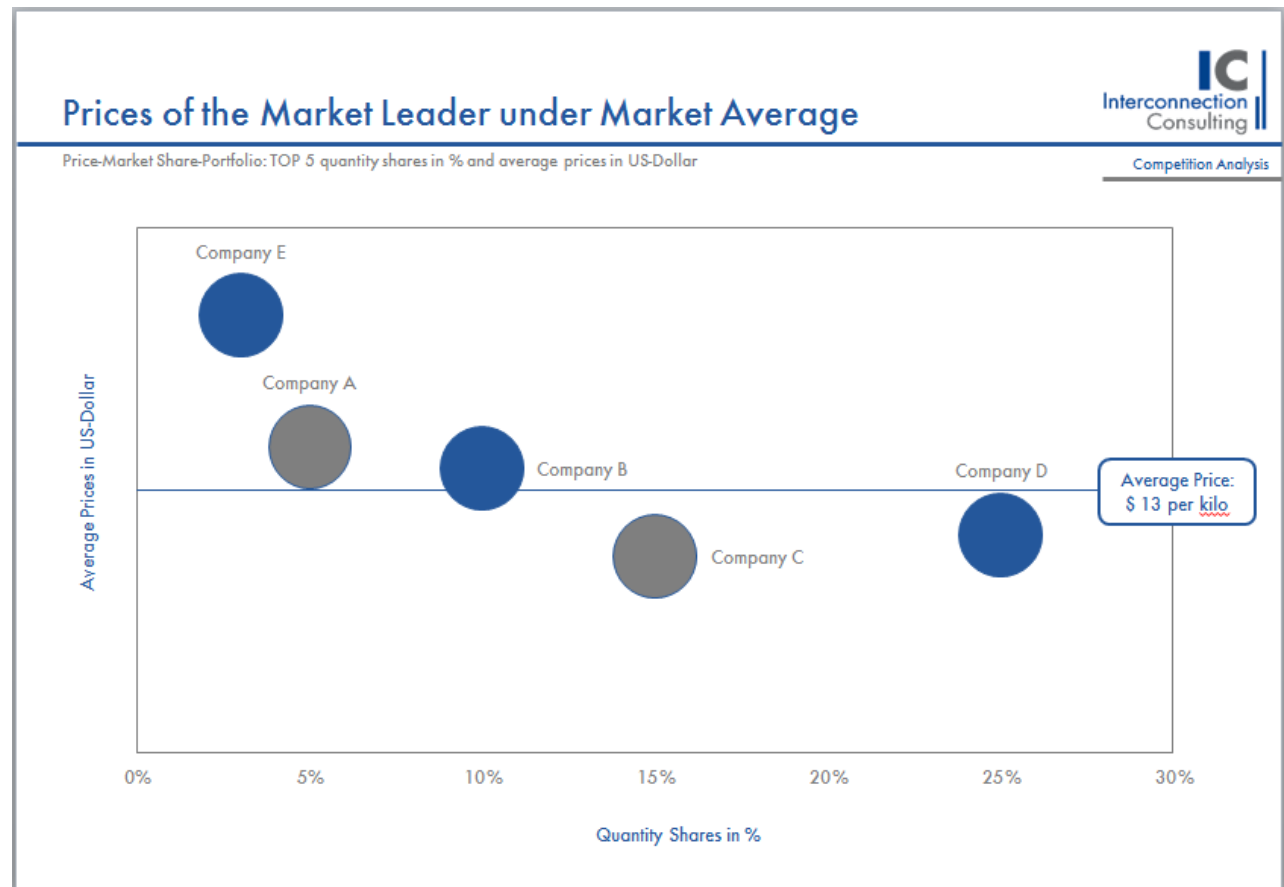
# Competition Analysis and Market Shares

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



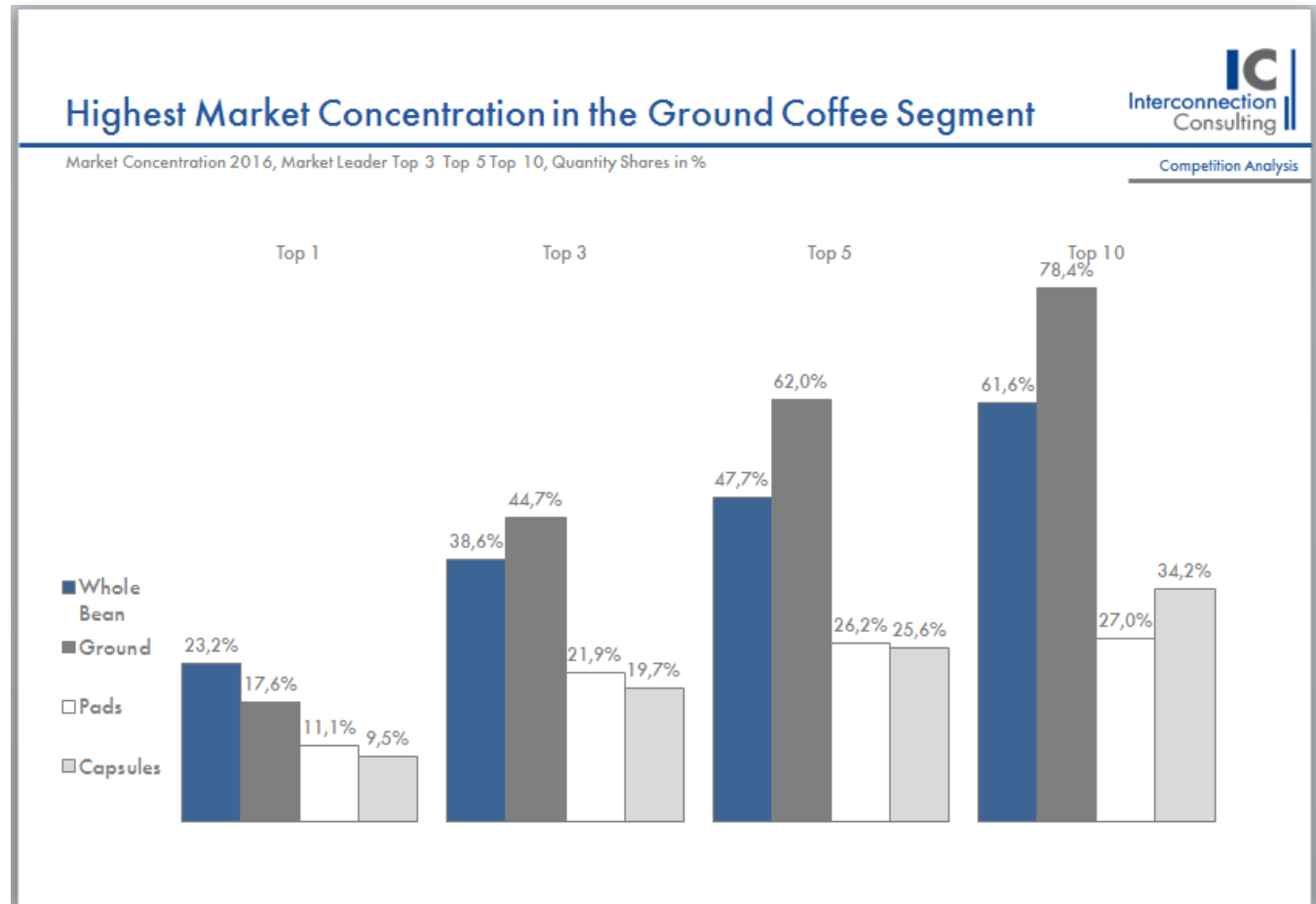
# Strategic Analysis of Product Groups and Segments

- 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	<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>

# Investment Plan for Your Market Research

	Single Issue	IC Subscription *	Scale of Discounts
Single Country	€ 3.500,-		€ 5.000      -10%
Latin America Top 5 **	€ 11.500,-		€ 10.000      -20%
Latin America Top 8 **	€ 14.900,-		€ 15.000      -30%

Available countries	Argentina	Brazil	Chile	Colombia
	Ecuador	Mexico	Peru	Venezuela

\* **IC Subscription:** 20% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year. The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before 31st December.

\*\* **Price Special** (not taking into account the scale of discount)

Price includes an interactive PDF Document. All prices shown exclude sales tax



# Your Advantages as a Subscription Customer

Please choose between Subscription\*  
or Single issue

**Subscription\***  **Single Issue**

*As a subscription customer, you will receive the chosen report automatically at a reduced price from now on as soon as the new edition of the report is published. Additionally you have access to the following benefits:*

- **Price advantage** IC Standard Subscription (annual receipt of an IC study or IC study package): **20% price advantage** compared to single issue taking into account the **scale of discount**
- **Annually updated reports** on fixed dates
- One time a year **free web conference** with the Analyst of the report (presentation of key results, background information, answering of questions)
- **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

# 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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## Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 75/ per Country
- Optional: Hard Cover

## Price

- per region: € 3.500
- All regions : € 14.900

Detailed Information about special offers, scale of discount as well as subscription prices are presented within the order form or the interactive price calculator.



## Options of ordering – Fax:+43 1 5854623 30

- Click „Buy Now“ on the website and make your order with the interactive price calculator.
- Print out your order form (at the end of the “Full Details” document and fill in your data.

## Content of the Market Report

### Structure of the Study

#### Language of the report

English, Spanish on Request

#### 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: consumer behaviour, main economic indicators etc.

Import & export statistics

#### Total Market Analysis

Total market development and forecasts for all market segments in quantity and value by regions, product groups, system types and distribution channels

#### Competition Analysis

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

### Market Structure

#### Regions:

Argentina, Brazil, Chile, Colombia, Ecuador, Mexico, Peru and Venezuela

#### 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 analysed 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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## Yes, we would like to order the IC Market Tracking® Coffee in the HORECA Sector Latin America 2017

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



Industry/Region	Single Issue
<input type="checkbox"/> Argentina	3.500,- EUR
<input type="checkbox"/> Brazil	3.500,- EUR
<input type="checkbox"/> Chile	3.500,- EUR
<input type="checkbox"/> Colombia	3.500,- EUR
<input type="checkbox"/> Ecuador	3.500,- EUR
<input type="checkbox"/> Mexico	3.500,- EUR
<input type="checkbox"/> Peru	3.500,- EUR
<input type="checkbox"/> Venezuela	3.500,- EUR
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\*\*Preis Special (not taking into account the scale of discount)

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Date

Name

Signature