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IC Market Tracking[®]

Professional Coffee Machines 2016

Offer 2016



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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 and Segments
- ✓ Information about the most important **Factors of Influence**
- ✓ **Graphic Presentation** of the results facilitates the development of your own strategies.





Professional Coffee Machines in Europe 2016

Germany

Austria

Switzerland

Italy

Market by...

Product Groups

Fully Automatic

Automatic

Semi-Automatic

Manual (lever-driven)

Filter Coffee

Pad / Capsule System

Customer Segment

Hotel

Restaurant & Catering

Coffeehouse

Bakery & Confectioner

Distribution Channels

Direct

Indirect

For each segment the total market for 2014-2019 (2017 - 2019 as a forecast) will be shown as well as market shares of the top players for 2014-2015 in total and per product group



Definitions and Demarcation

Categories

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

Quantity is stated in units

Product Groups

Fully automatic service

Possesses a default system which enables fully automatic control

Automatic service

Feature a pump, automated temperature controls for the boiler, and automated (frequently programmable) preset water volumes selected by pressing the button

Semiautomatic service

Feature an automated pump, automated temperature controls for the boiler, and activation switches to engage and disengage the pump by baristas

Manual

Lever-driven espresso machine, all parameters are individual and influenced by experienced baristas

Filter Coffee Machine

Feature a glass jug and pyramid filter for sediment-free filtered coffee

Coffee Pad Machine

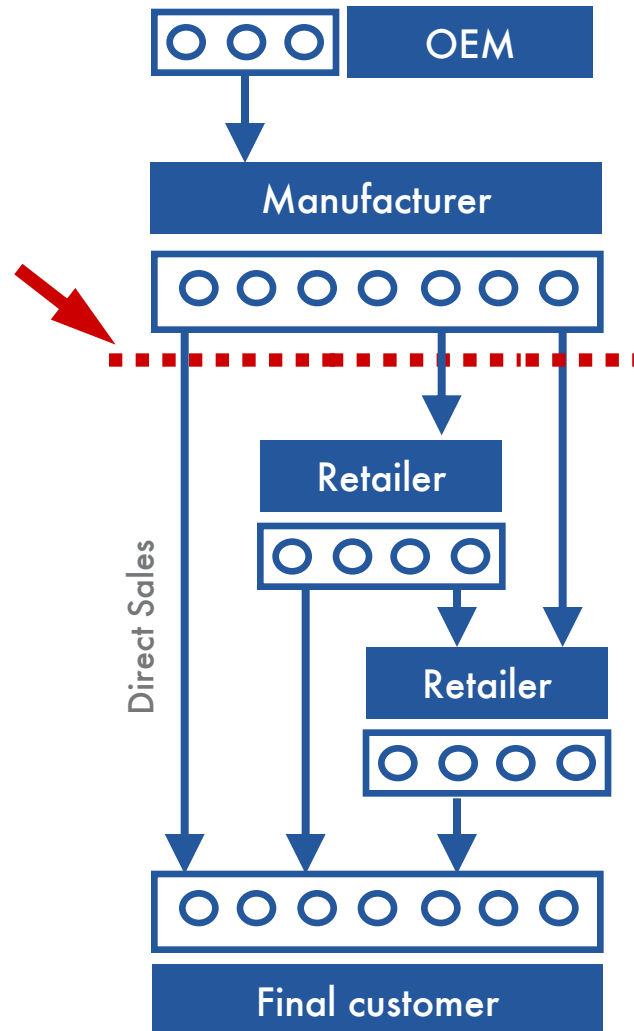
Feature no built-in grinder or brewing group, works instead with pre-packaged coffee beans in their own filter

Capsule Coffee Machine

Feature no built-in grinder or brewing group, works instead with coffee capsules, one may differentiate between open and closed capsule systems

Interconnection measures the total revenue of a branch's net sales price to the first buyer on the provider market (no OEM).

The sales are segmented after the first distribution partner.

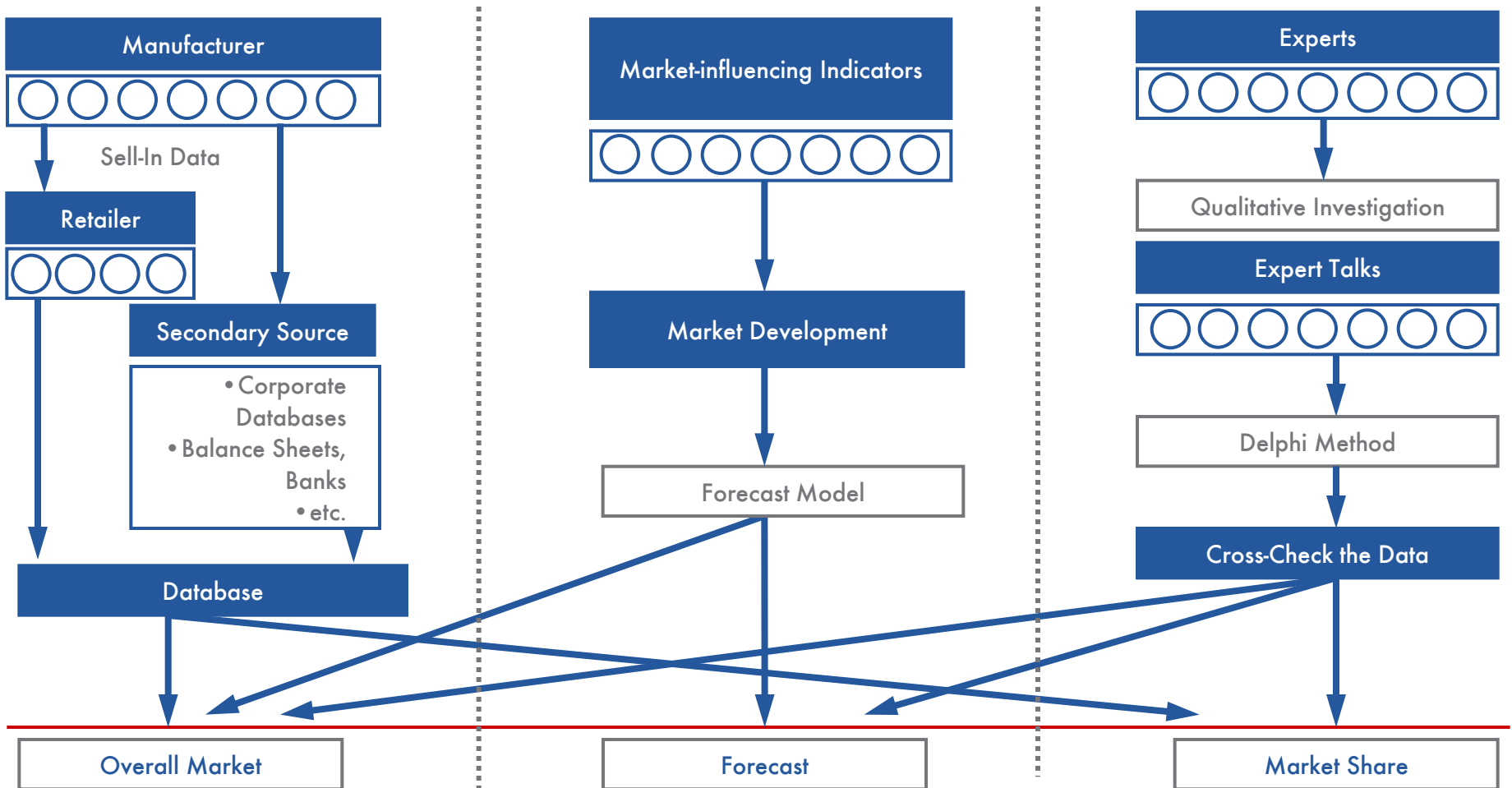


The study is based off of information from the most important manufacturers within the branch. This information is gathered from telephone interviews and also gathered from surveys. In contrast to this method partner companies receive portions of the surveys for free which in turn guarantees a higher response rate.

Interviews with distributors and specialty retailers are used to cross-check the data.

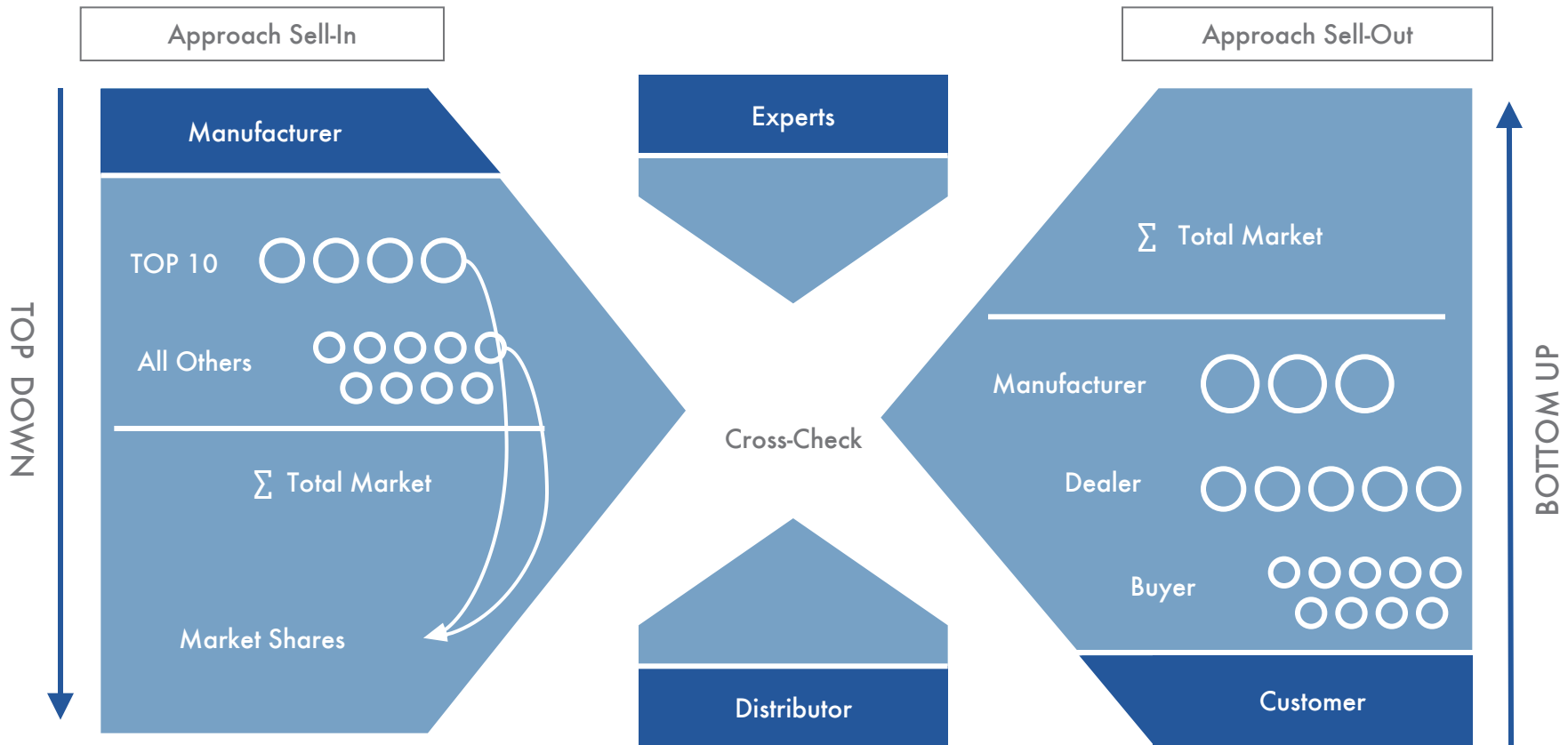
Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology



Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey 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 consumer behaviour, 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

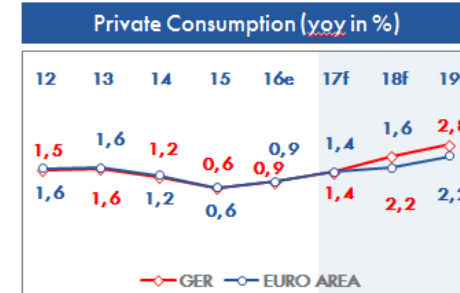
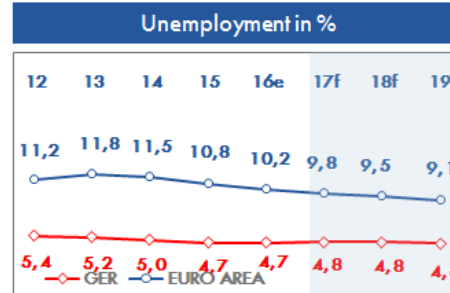
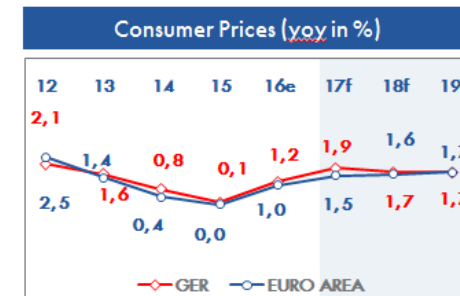
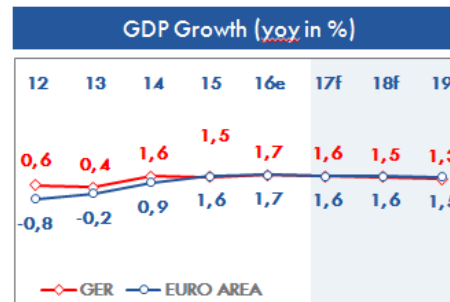
- The data for the market environment consists of main factors such as general economy data, demography, income statistics and sentiment indicators
- This chart shows *dummy figures*



National Economy

Private Consumption Gains Weight in 2016e

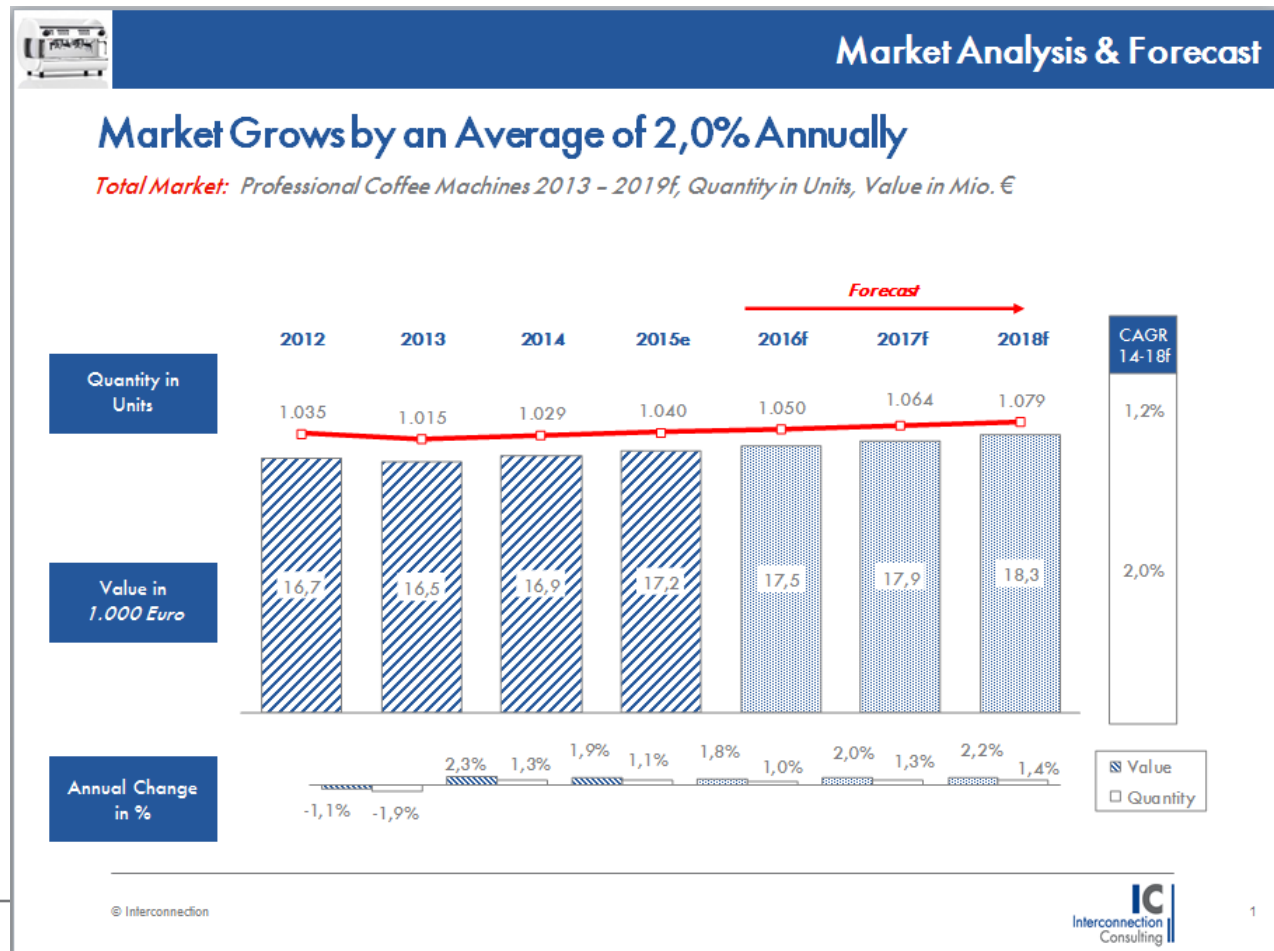
General Economy: GDP Growth, Unemployment, Consumer Prices, Long-Term Interest Rates



Source: EIU Country Data 01/2016

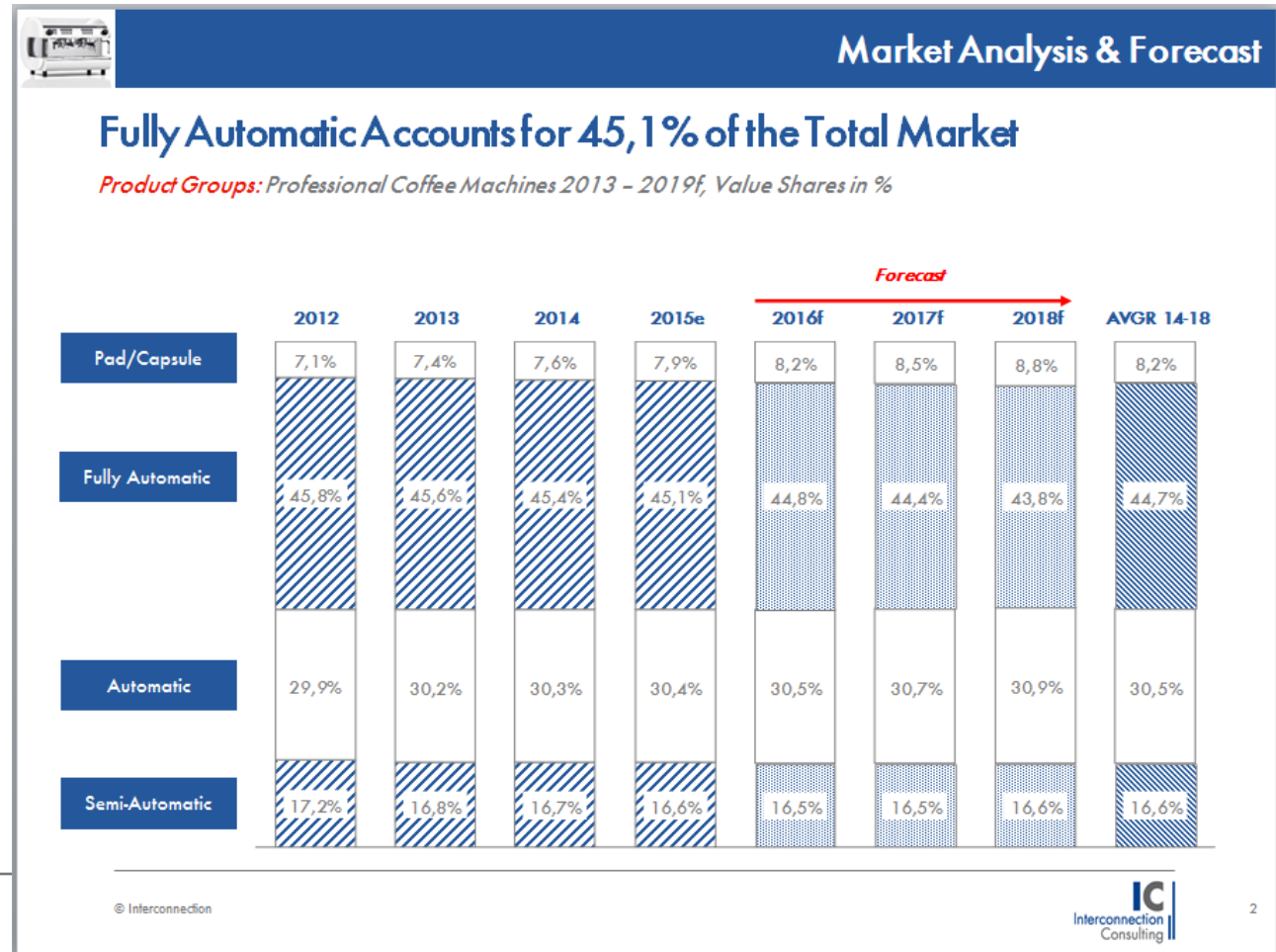
Total Market Development and Forecast

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



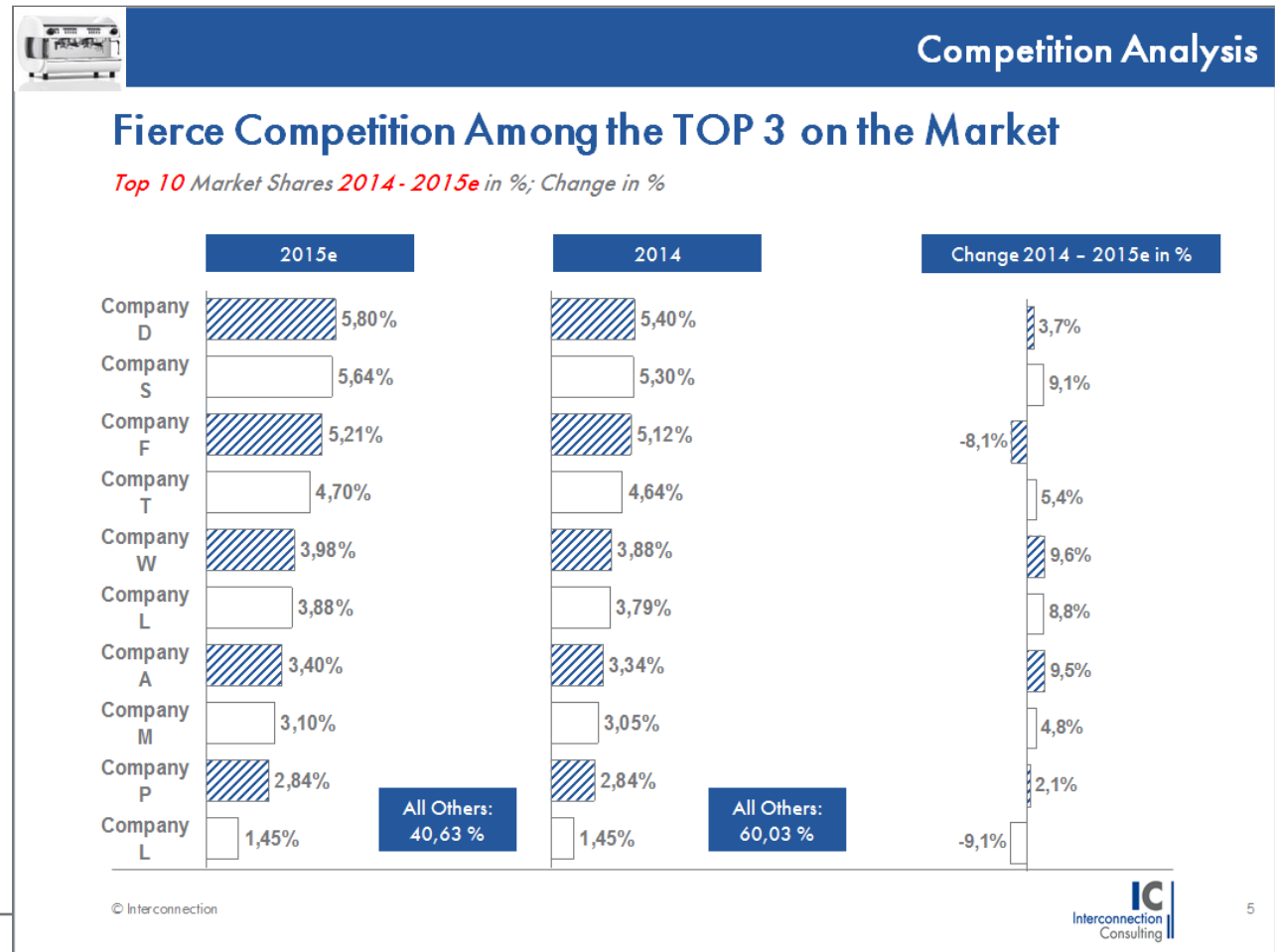
Trend-Analysis Regarding Product Groups, etc.

- Overview of the different product groups, their distribution channels, business and customer segments including trends for the upcoming three years
- This chart shows *dummy figures*



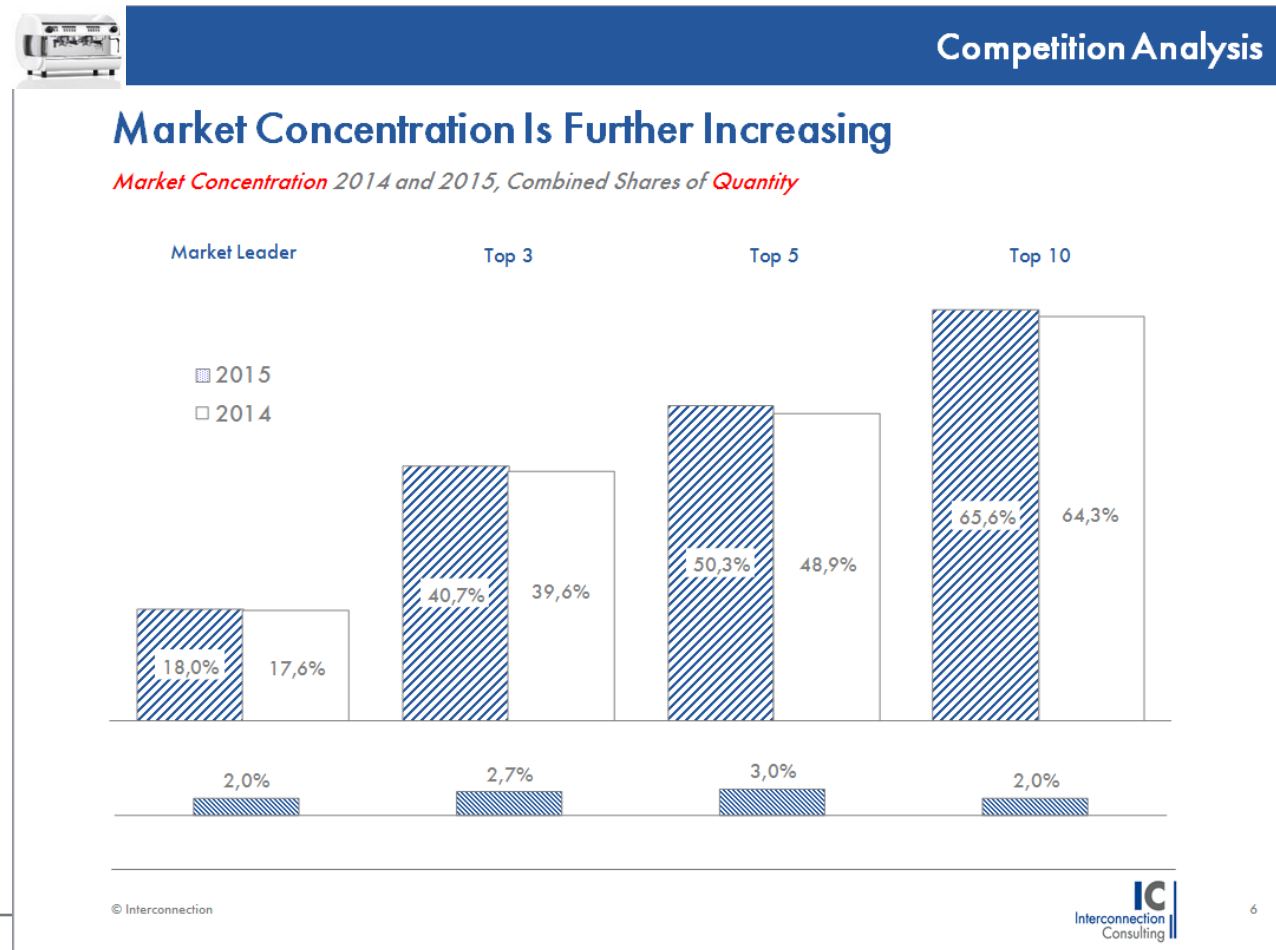
Analysis of the Competitive Landscape

- Competition Analysis by Market Shares for all surveyed product groups/segments for the last two years
- This chart shows *dummy figures*



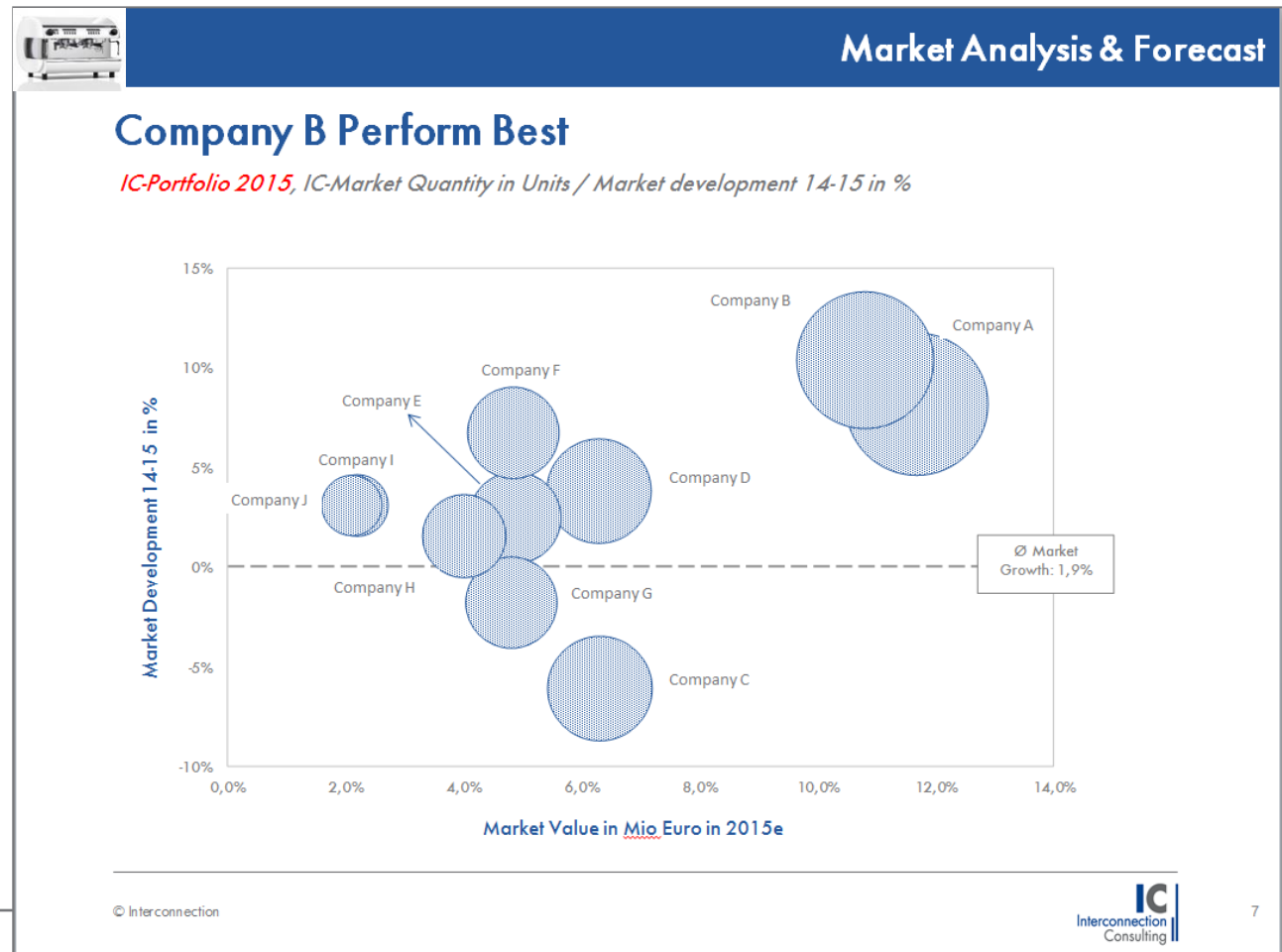
Market Concentration

- Analysis of the Market Concentration among the Top Companies
- This chart shows *dummy figures*



IC Marktportfolio

- *Market Shares & Market Changes Top 10 Players in Quantity/Value*
- *This chart shows **dummy figures***





IC Market Tracking® Professional Coffee Machines in Europe 2016

	Single Issue	Subscription *	Scale of Discounts from a buying price of	
All 4 Countries**	€ 7.950,-	- 20%	€ 5.000	-10%
Single Country	€ 3.950,-	- 20%	€ 7.000	-25%
			€ 10.000	-30%
Available countries	Germany		Austria	
	Switzerland		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.

** Prices with regards of the scale of discounts.

Price includes an interactive PDF in electronic form. All prices shown excludes sales tax.



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- **Info-Hotline:** For the period of one year you can state questions to the author of the study, furthermore the team of Interconnection will assist you for free in case any methodologic questions in the area of market research will arise in your company.
- As far as possible, we can also put together **flexible subscription packages** (e.g. Biennial subscription, change of countries)
- After receiving 2 editions of the subscribed report, the **subscription can be cancelled without any problems.**

Pivot Table

- In addition to the visualized report a Pivot Table will be included.
- This tool allows individual and selective analyses to be made by the user with the available data, especially when it comes to future trend and segmentation modeling.
- Pivot tables are available for the competition analysis as well as for the total market and forecast studies.

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)

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 - #	
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

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



Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the 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 gastronomy industry.
- Next to market data we offer for the gastronomy 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 Analysis



- 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 Satisfaction



- Importance/Satisfaction Portfolios
- Customer Loyalty
- Customer Typology

Price Research



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

Web**verstärker**



- 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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General Information

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 80 for each country
- Optional: Hard Cover

Price

- per country: 3.950 €
- all regions: 7.950 €
- Hard Cover: 150 €

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

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, business segments, customer segments, distribution channels and opening types.

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

Regions:

Germany, Austria, Switzerland, Italy

Product Groups

Fully automatic, Automatic, Semi-Automatic, Manual (lever-driven), Filter Coffee Machine, Pad/Capsule System

Customer Segment

Hotel, Restaurant & Catering, Coffeehouse, Bakery & 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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- Info-Hotline: answering of questions with regards to the report and on methodological issues relating to market research
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