



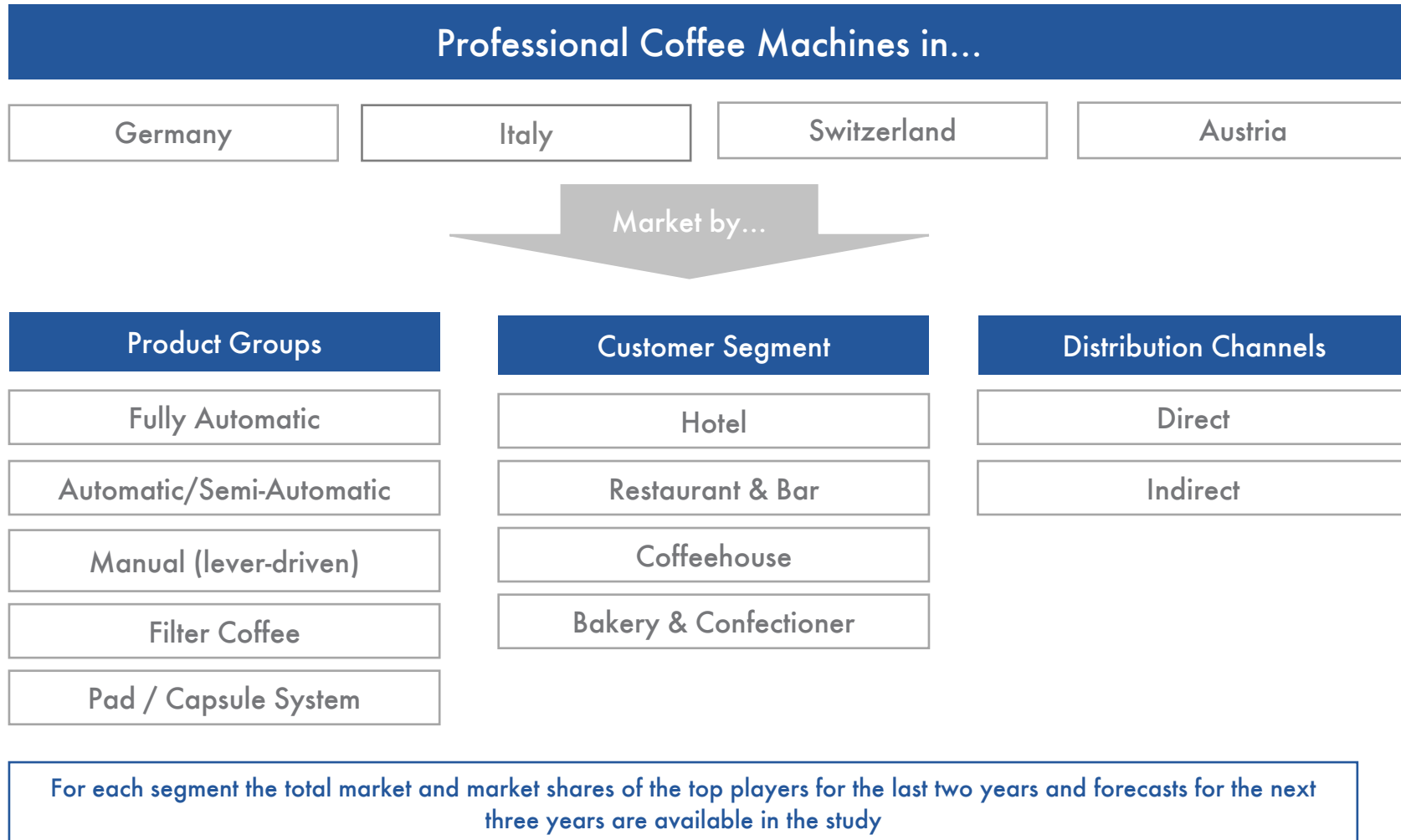
**IC Market Tracking
Professional Coffee
Machines in Italy + D-A-CH
2018**

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





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

Possesses a default system which enables fully automatic control

Automatic/Semi- Automatic

Feature a pump, automated temperature controls for the boiler, and automated (frequently programmable) pre-set water volumes selected by pressing the button or activation switches to engage and disengage the pump by baristas

Manual (Lever Driven)

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

Filter Coffee System

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

Capsule/Pad System

Feature no built-in grinder or brewing group, works instead with coffee capsules, one may differentiate between open and closed capsule systems. Includes also Pad System pre-packaged coffee beans in their own filter.



Professional Coffee Machines in Italy+D-A-CH

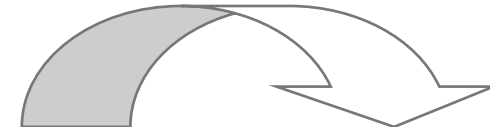
Multiplication with...



Number of Hotels,
Restaurants and Bars,
Coffeehouses, Bakeries and
Confectioner (Based on
Secondary Market Data)

Average Number of
Operating Professional
Coffee Machines

In consideration of...



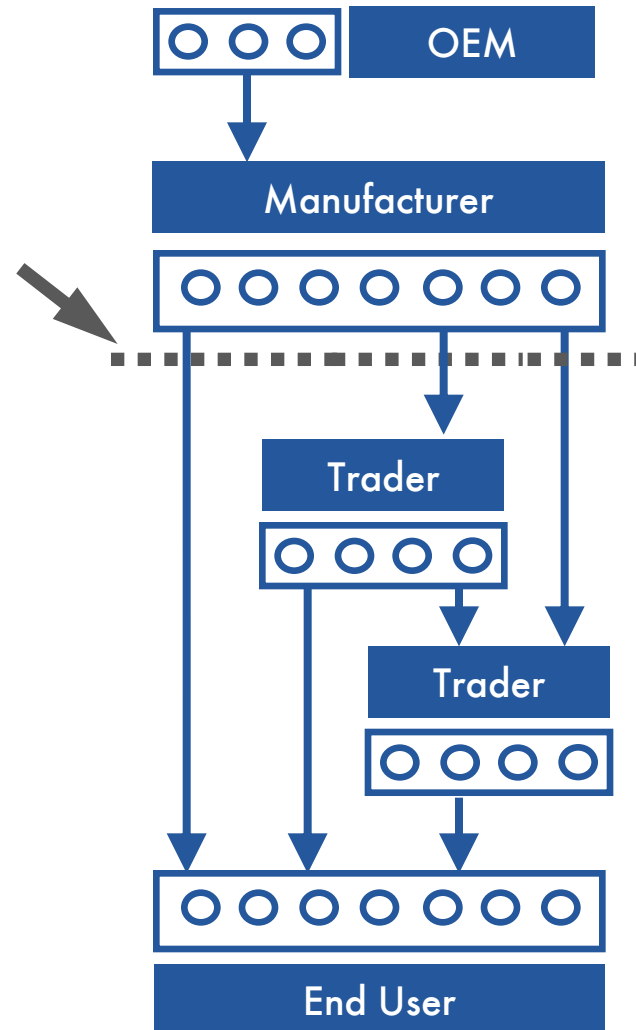
Total Number of
Operating Professional
Coffee Machines

Average
Serviceable Life and
Renewal Patterns

What Do We Measure in Our Reports?

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

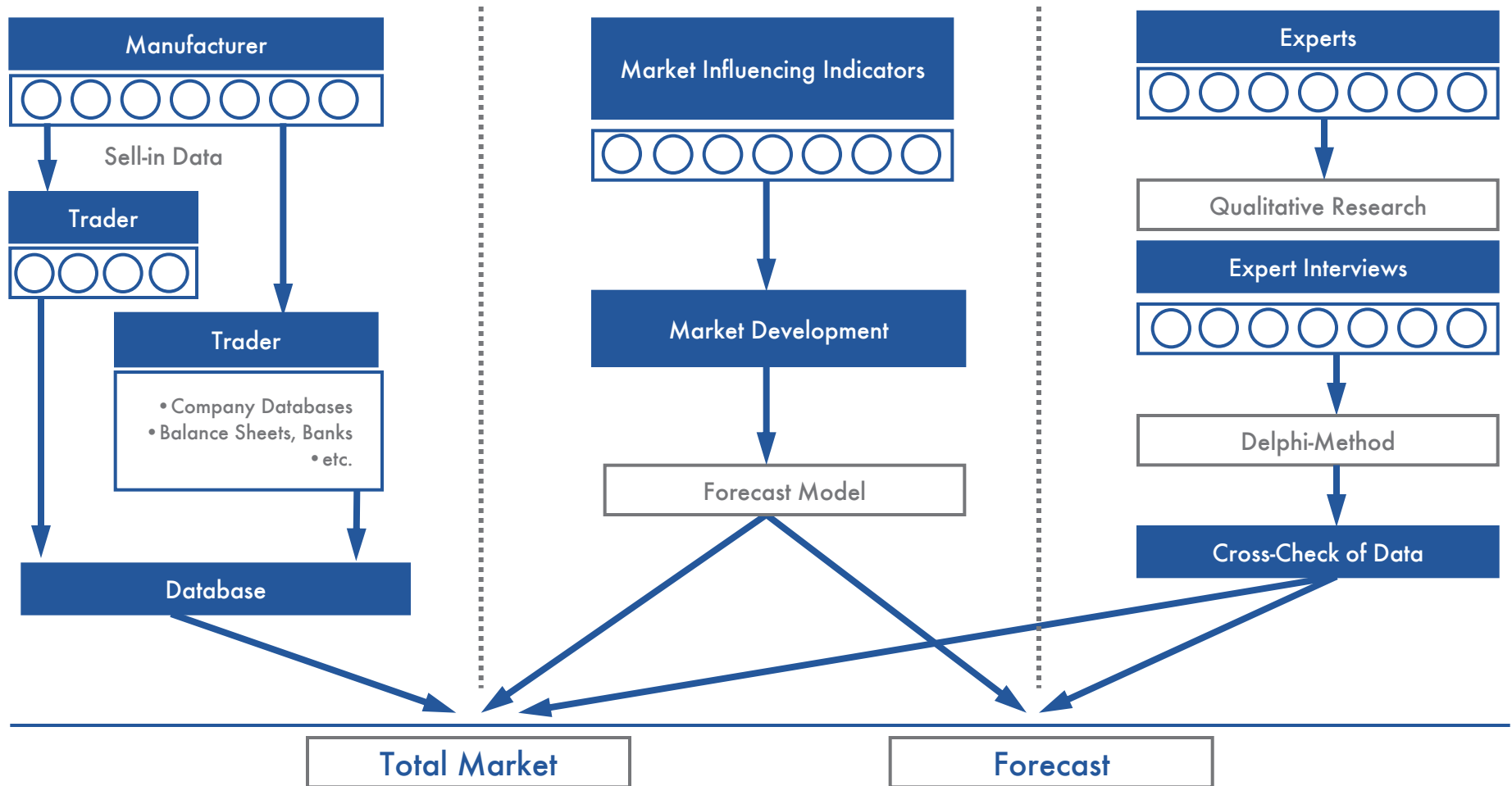
Sales are segmented by the first distribution partner.



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 traders act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.

How Do We Conduct Our Research?



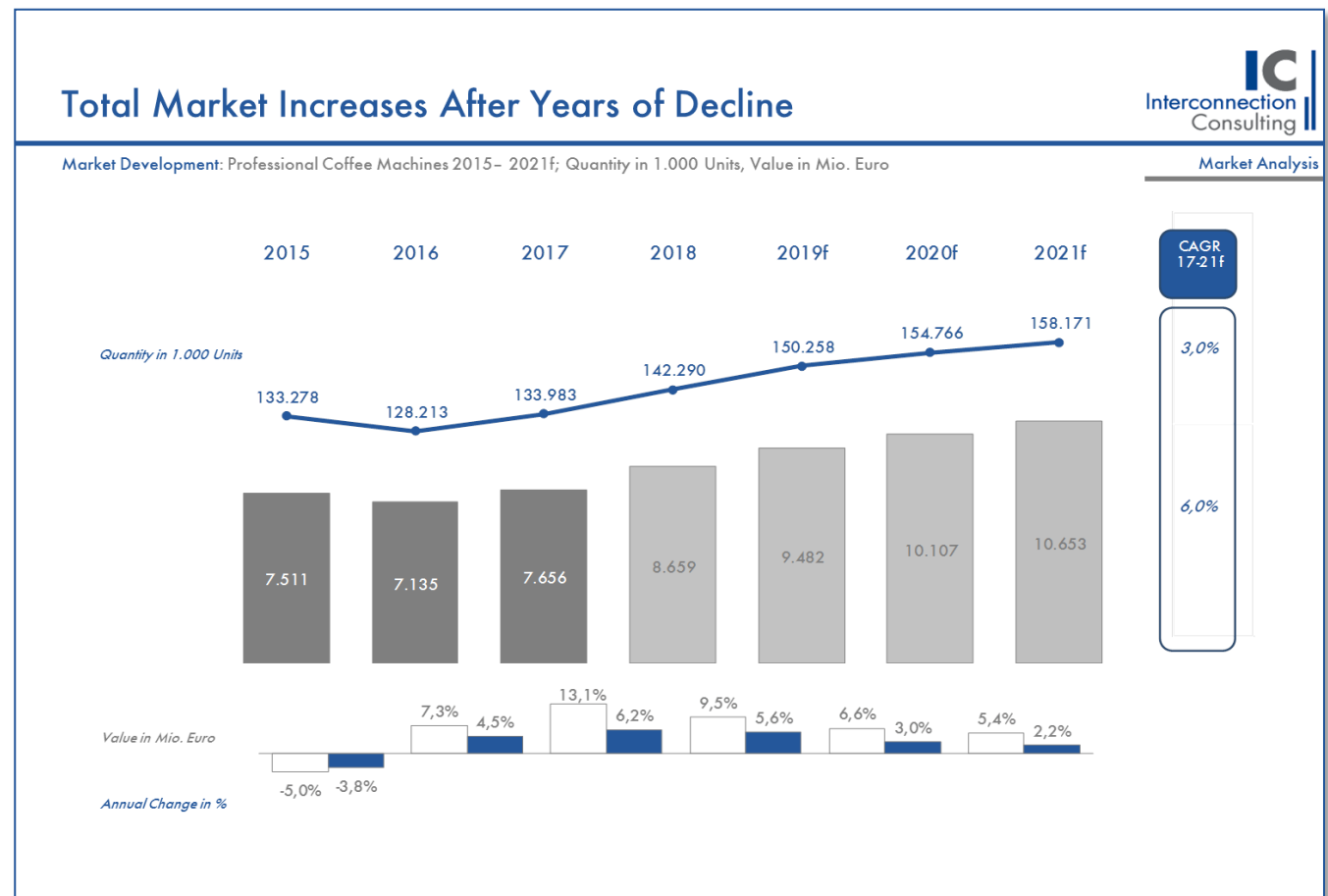
Contents of the IC Market Tracking®

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.

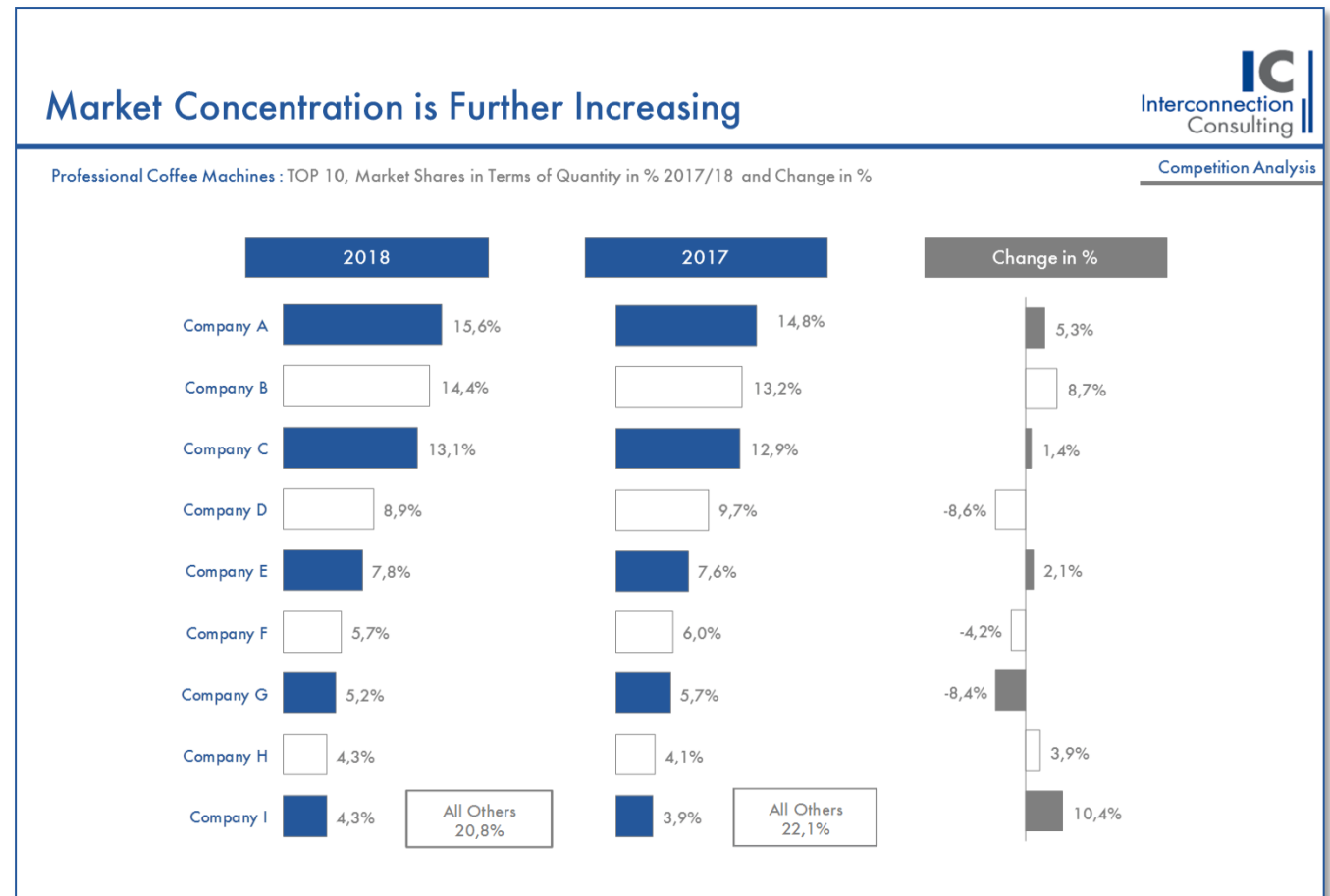
Total Market Development and Forecast

- 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.



- 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

	Subscription*	Single Issue
Italy + D-A-CH**	€ 9.999,-	+25% for Single Issues
Single Country	€ 3.950,-	
Available countries	Germany	Italy
	Switzerland	Austria

* 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.

Interconnection Provides Data for Corporate Decisions



Our Market-Intelligence Tools



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

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we show you the way

Selected References:



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: 9.999 €
- 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 and 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.