

ESPRESSO IN NUMBERS

MEET THE MANUFACTURER 2021

Coffee Consulate – Mannheim

1st June 2022

A vertical sign with illuminated letters spelling 'COFFEE' on a wall. The letters are made of wood and have small lights around them. The sign is mounted on a light-colored wall. A small potted plant is visible at the bottom right of the sign.

Coffee is resilient but markets will not be as before

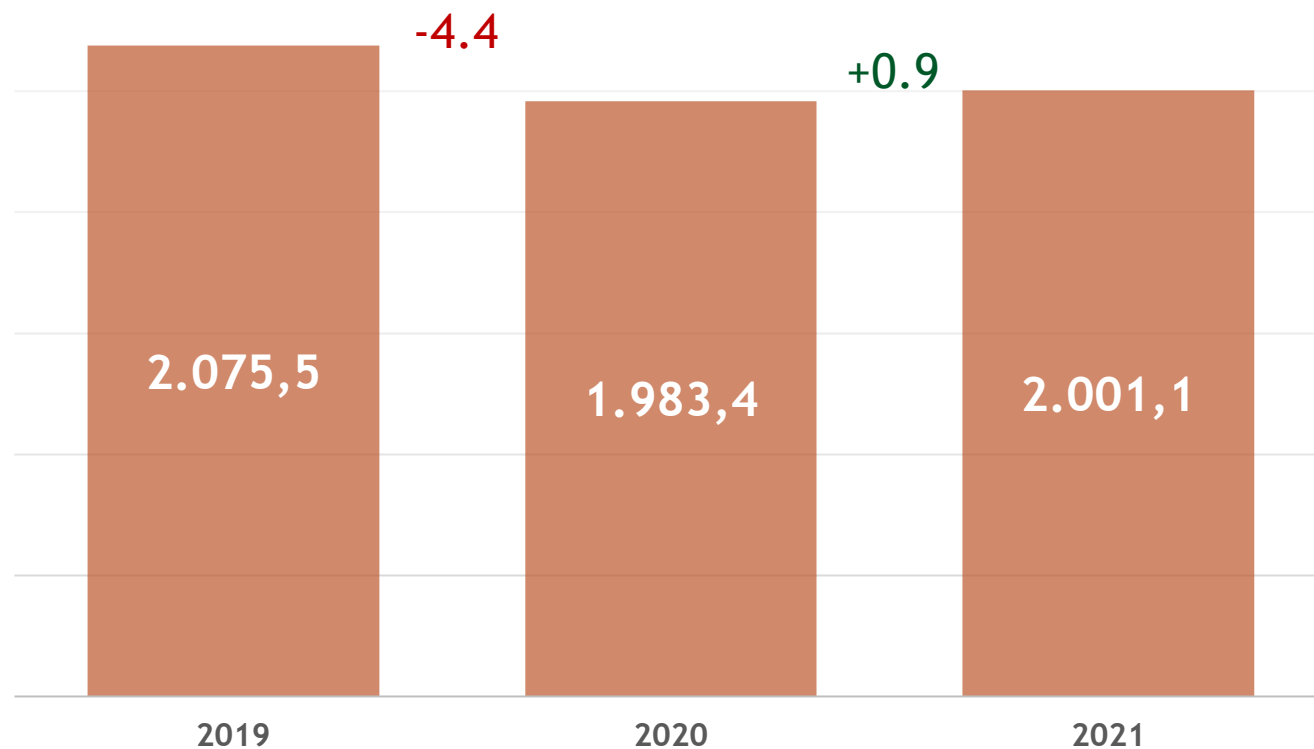
The pandemic has been an important challenge for the coffee sector:

- ▶ Strong decline for the Out-of-Home consumption while increase in home consumption.
- ▶ Larger use of coffee machines at home.
- ▶ Use of online channels with delivery or collect.



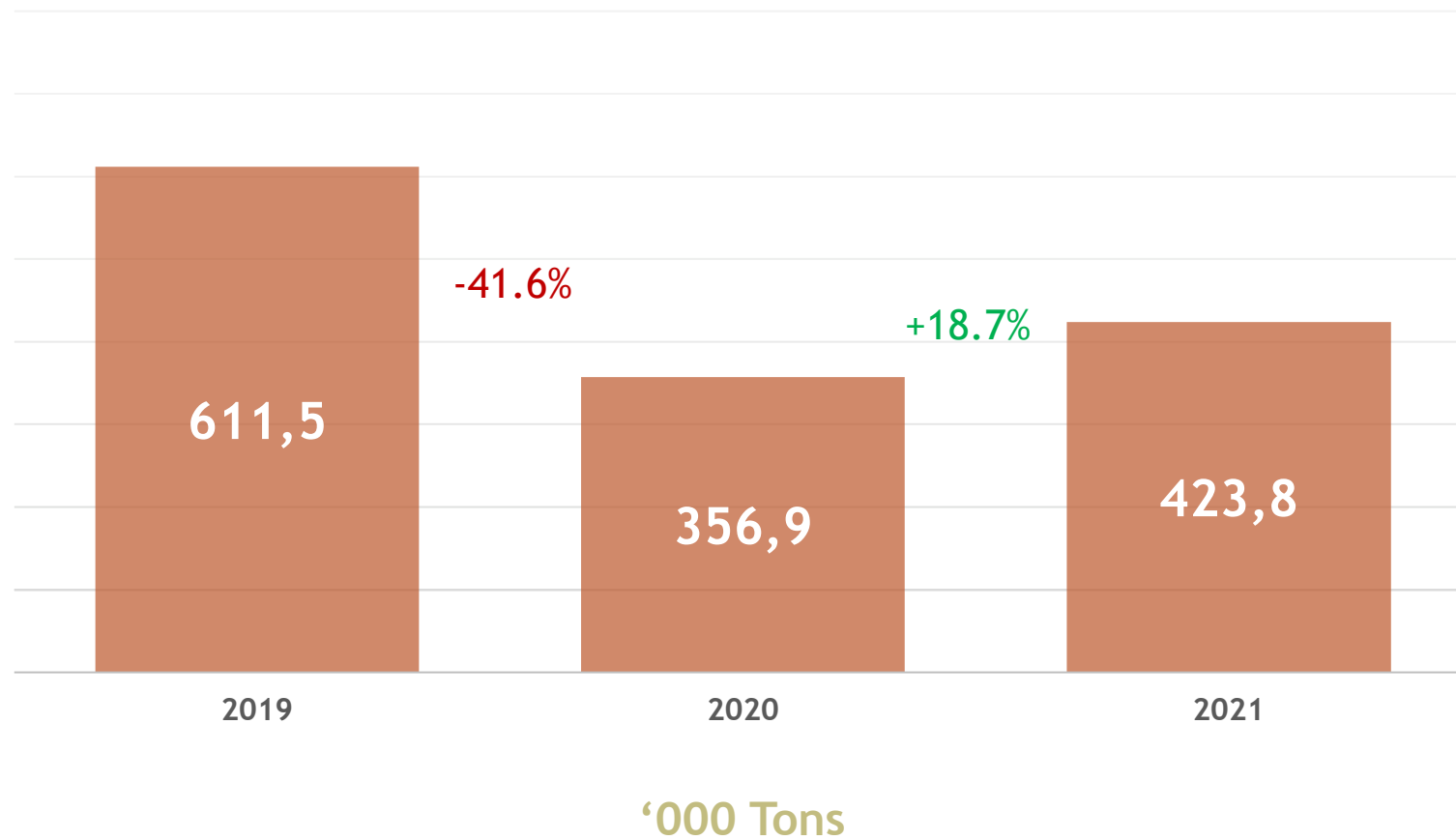
Coffee numbers

Coffee market in Europe 2019-2021

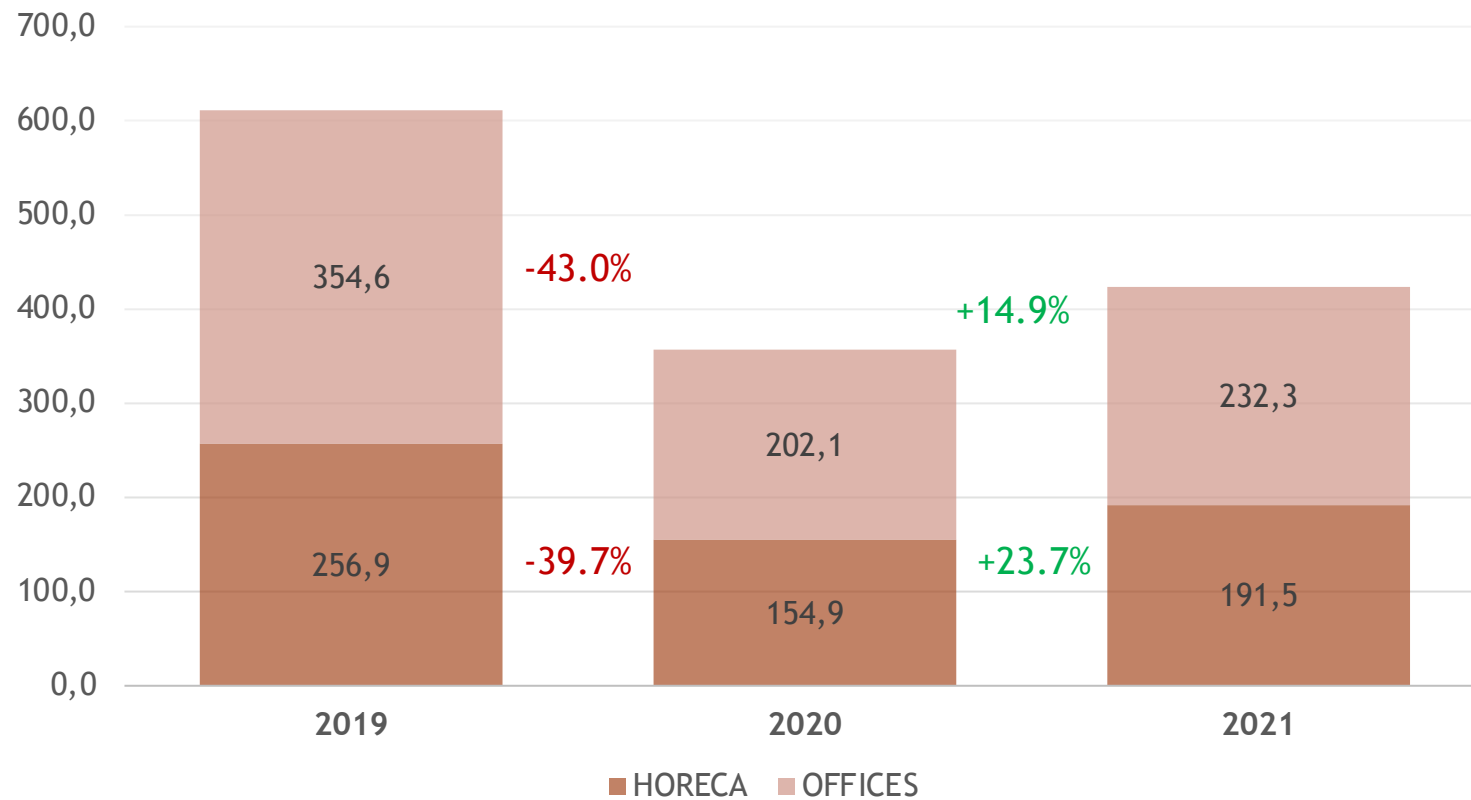


'000 Tons

The European coffee market Out-of-Home



HORECA & Offices



'000 Tons

Out-of-Home coffee markets

Leading European Countries

| | 2020/2019 | 2021/2020 |
|----------------|-----------|-----------|
| France | -45.0% | 19.8% |
| Germany | -46.0% | 20.9% |
| Italy | -47.5% | 20.1% |
| Spain | -46.5% | 19.7% |
| United Kingdom | -19.4% | 21.4% |
| Poland | -38.0% | 19.6% |



Demand changes

A new coffee break

“The pandemic has changed times and places of the coffee break”.

- ❑ Customers are becoming more demanding in terms of quality.
- ❑ Even after the pandemic, consumers will continue to use online channels for reservations and deliveries.
- ❑ Many people will continue to work at home or in different places (Itinerant e-workers).



- ❑ The increase in requests for coffee machines was intended to reproduce the quality of the coffee cup in the bar.
- ❑ All this does not mean that coffee shops or restaurants are finished. Consumers are eager to return but they have new expectations and should not be disappointed.





How to change?

How to change

- ❑ It is necessary to innovate the offer, with quality products for more demanding customers.
- ❑ Overcrowding must be avoided while maintaining high standards of hygiene.
- ❑ Operators need to reconfigure interior spaces with the use of take-away aisles and areas for table service.
- ❑ Companies have to become increasingly digital. Online orders and home deliveries should become the norm.



Experience

- ❑ It is not a simple matter of offer or new blends.
- ❑ It is not just a question of delivery times or delivery costs.
- ❑ It is not just about improving the usability of online channels.

“We will have to rethink the experience and the way the coffee has been served up to now ”



Build for the Experience

- ❑ Presence and online channel should be managed almost independently.
- ❑ Reserving a different experience for customers at the table that does not replace the take-away and home consumption.
- ❑ Applications could be used to place orders, not only for security reasons but also to increase requests, with personalized offers and menus for registered customers.



Premium delivery

- ❑ Delivery packaging could be improved, providing premium services and agreed times for customers willing to pay a higher price.
- ❑ Restaurateurs will need to consider creating menus that travel well, making sure they can fulfil orders accurately to prevent products from deteriorating or cooling down, thus safeguarding quality and their brand.



The future of coffee



*“Focus on what you can do best to serve
with exclusivity”.*



Thank you!

Mariano Peluso

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