

TASTE ODYSSEY

PURSUING CATEGORY EXCELLENCE



BUILDING BIA COFFEE HOUSE

>\$1 BILLION BUSINESS



K E Y Q U E S T I O N S

01.

**Is it a relevant
category to play?**

02.

**What are the
category dynamics
& who is the
benchmark?**

03.

**Why, When & Who
are the Coffee
consumers?**

04.

**What are the most
relevant trends for BIA
& where should we
focus?**



CONTENT

STRATEGIC JOURNEY

01.

COFFEE FUNDAMENTALS (CAT)

- Coffee Cycle
- Need States & consumption moments
- Consumer Typologies
- All coming together

02.

CONSUMER TRENDS (CAT)

- Macrotrends & LATAM trends, Local Trends
- Benchmarks & competitors
- The Ecosystem

03.

BUT COFFEENESS FIRST (CAT)

- What is Coffeeness
- Coffeeness as a priority
- Consumer Centricity

04.

WHERE WE ARE (MKT)

- Current assessment
- What we are doing right
- What we need to fix
- Gaps & White spaces
- Our current KPI's

05.

WHERE WE WANT TO GO (CAT)

- Building our BIA COFFEE HOUSE
- Ambition per cluster
- Growth Pillars

06.

HOW TO GET THERE (MKT)

- Defend The Core
- Deploying key growth pillar
- Accelerate key enablers

CONTENT

STRATEGIC JOURNEY

01.

COFFEE FUNDAMENTALS (CAT)

- Coffee Cycle
- Need States & consumption moments
- Consumer Typologies
- All coming together

02.

CONSUMER TRENDS (CAT)

- Macrotrends & LATAM trends, Local Trends
- Benchmarks & competitors
- The Ecosystem

03.

BUT COFFEENESS FIRST (CAT)

- What is Coffeeness
- Coffeeness as a priority
- Consumer Centricity
- Priorities & Conclusions

04.

WHERE WE ARE (MKT)

- Current assessment
- What we are doing right
- What we need to fix
- Gaps & White spaces
- Our current KPI's

05.

WHERE WE WANT TO GO (CAT)

- Building our BIA COFFEE HOUSE
- Ambition per cluster
- Growth Pillars

06.

HOW TO GET THERE (MKT)

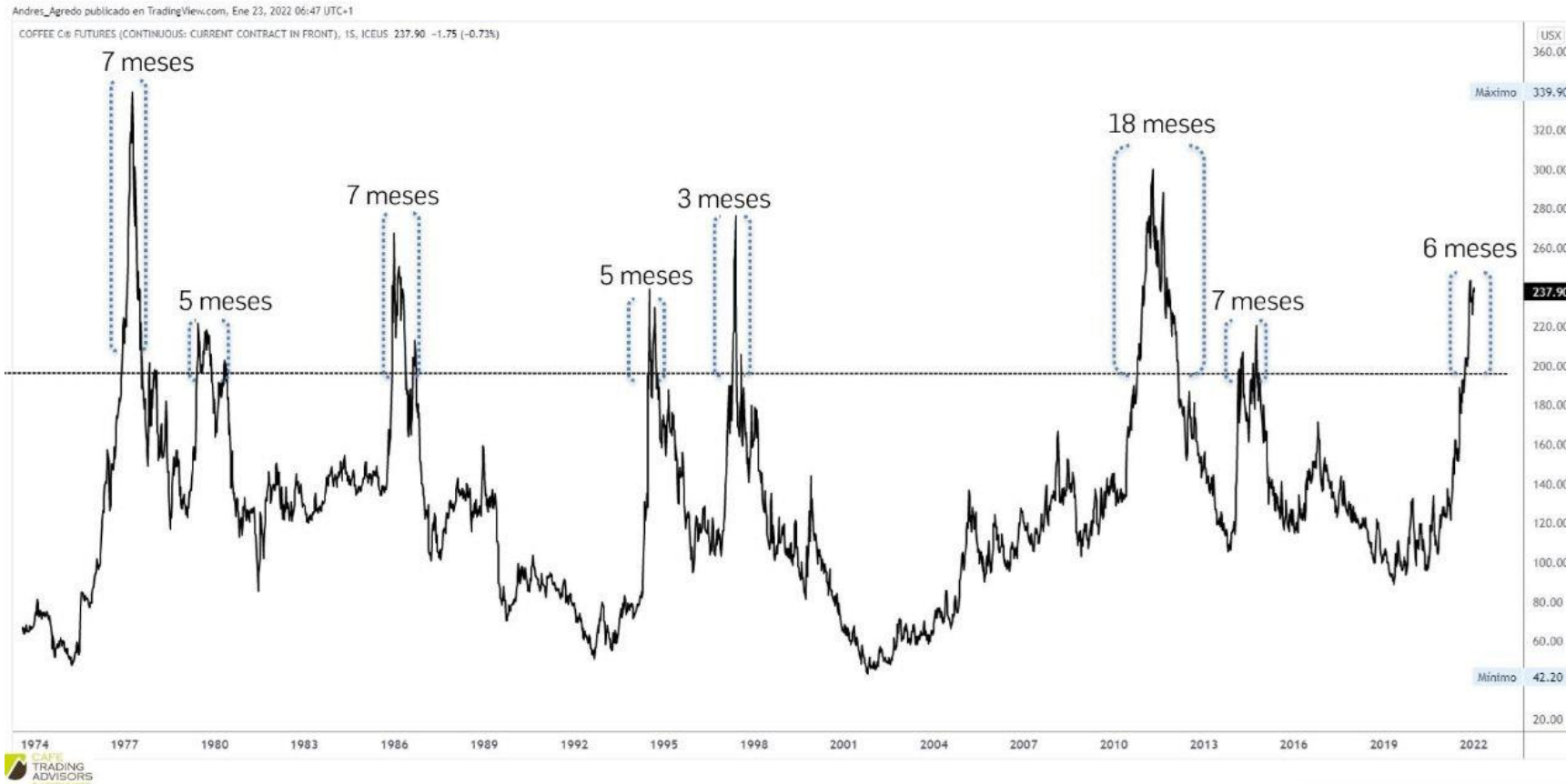
- Defend The Core
- Deploying key growth pillar
- Accelerate key enablers

THE CYCLE: A green coffee Cycle driven category

Pricing, price points, upsizing, downsizing, valuing up, formats, packaging, innovations are some of the category dynamics

TASTE
ODYSSEY

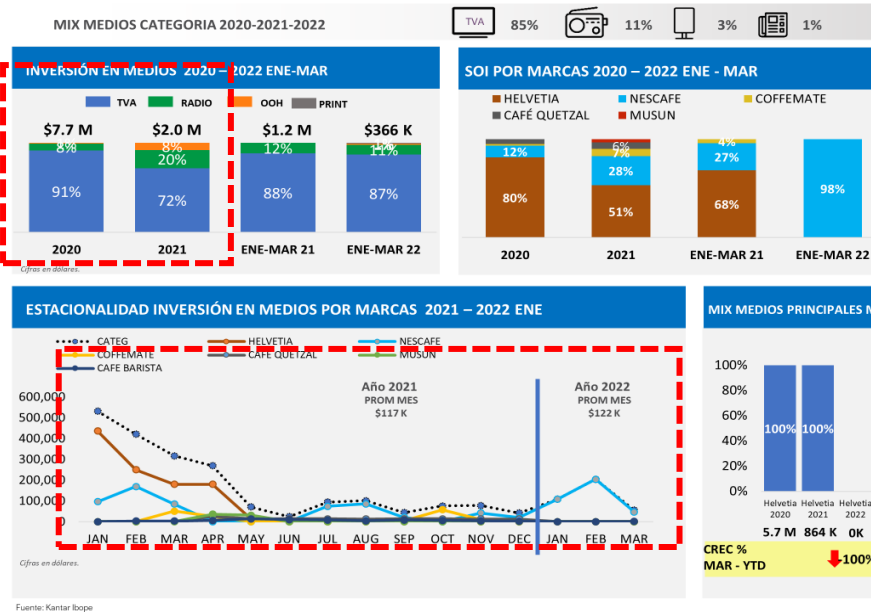
¿Cuánto tiempo suele durar el precio sobre los \$2.00 / lb?



The Cycle: Marketing investment influenced by green Coffee cycle and market leadership approach to the cycle. Market Leader wants to defend volume? Or defend Marginal Contribution?

Players minimizing marketing expense
to defend Marginal Contribution

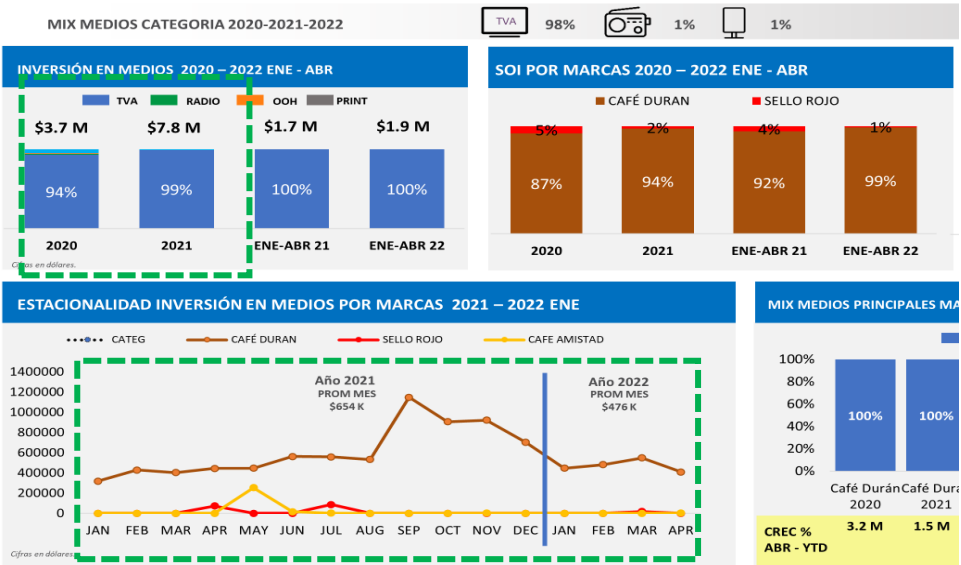
GUATEMALA



Market Leader lost volume, increased marketing investment in 2023 (8% NNS)

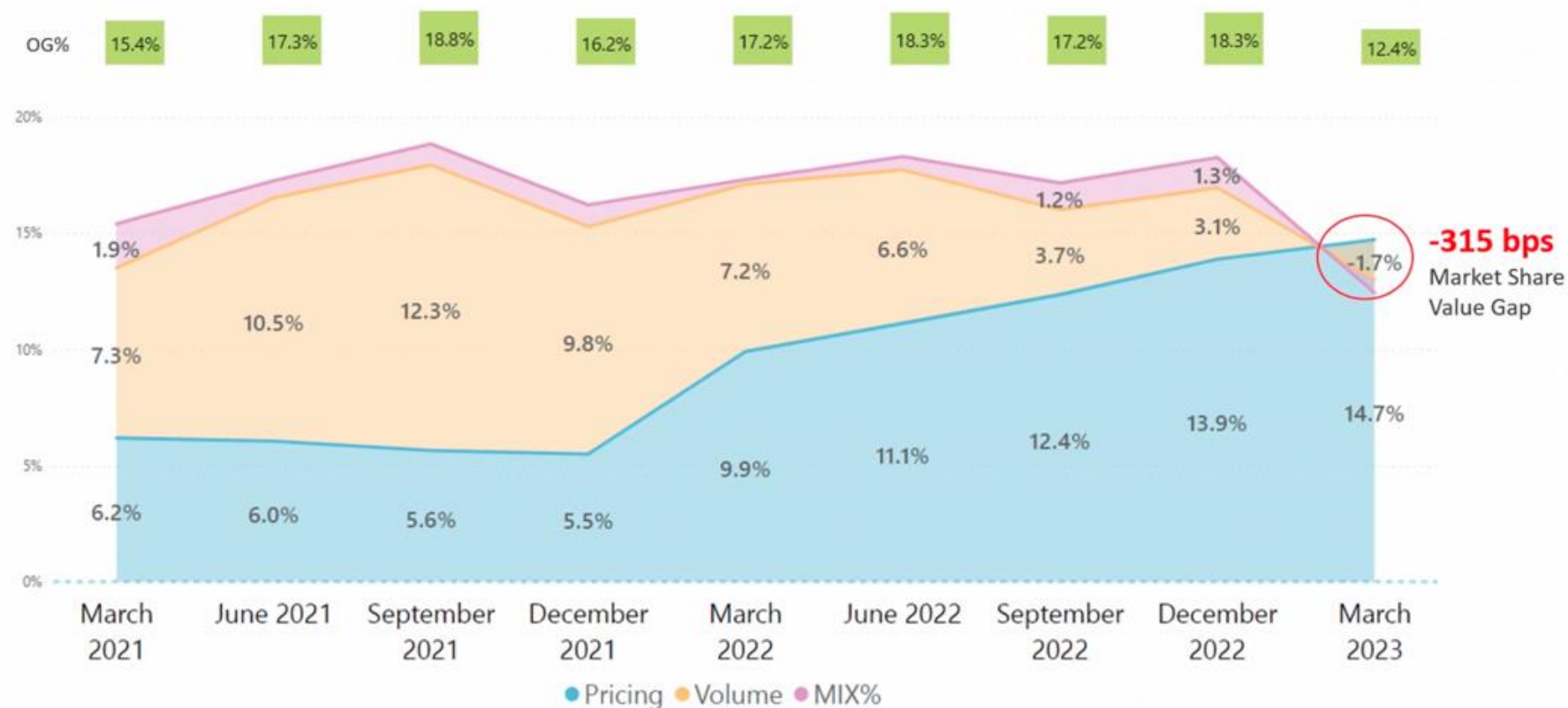
Markets leaders defending their
Volume

PANAMA



The Cycle: Real life example of category behavior when Market Leader decides to protect Marginal Contribution (price increase)

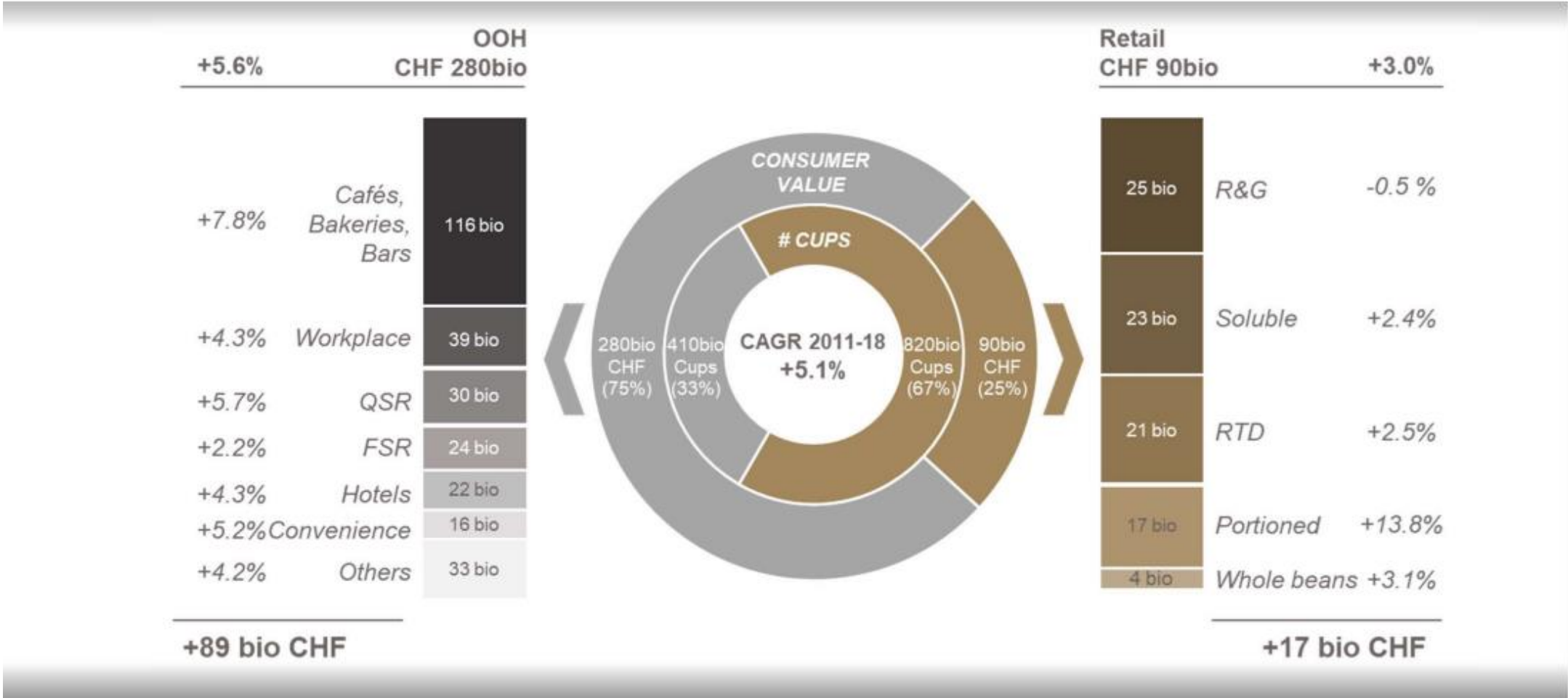
Negative inflection between Volume and Pricing impacted Market Share



Price Point elasticity directly correlated to Brand Funnel strength and strategic Price Points /Formats.
Need to find the sweet spot Price/volume to maximize the business.

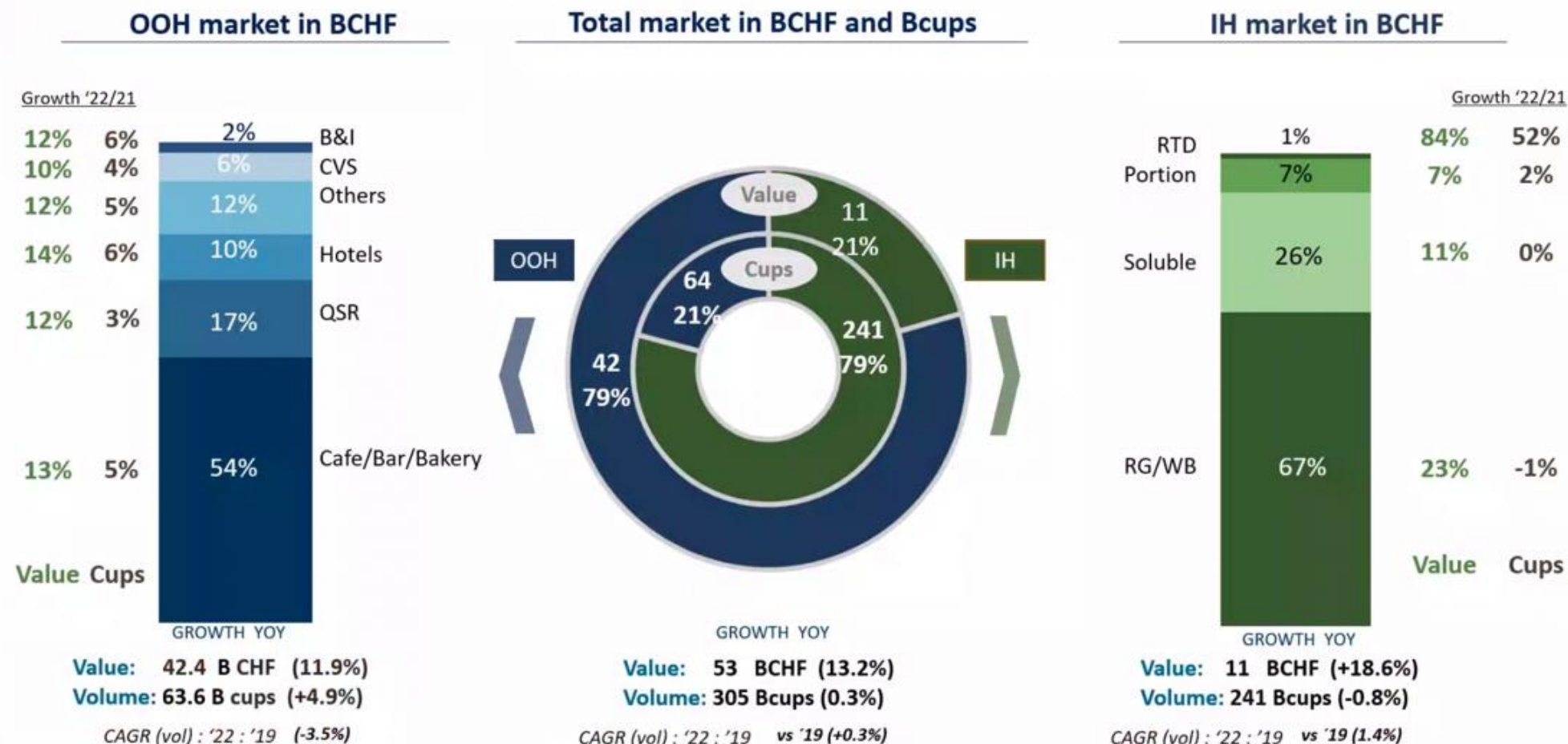
Why Coffee? : One of the categories with highest HHP in the world and growing!
Important differences between price/Cup, volume, segments and growth at home (retail) and OOH

COFFEE WORLD SEGMENTATION



Why Coffee? : Zooming in LATAM, where we are a coffee region, also has one of the highest HHP **TASTE ODYSSEY**
 Important differences among the rest of the world in the size of the segments (Ex. RTD) and OOF proportion.

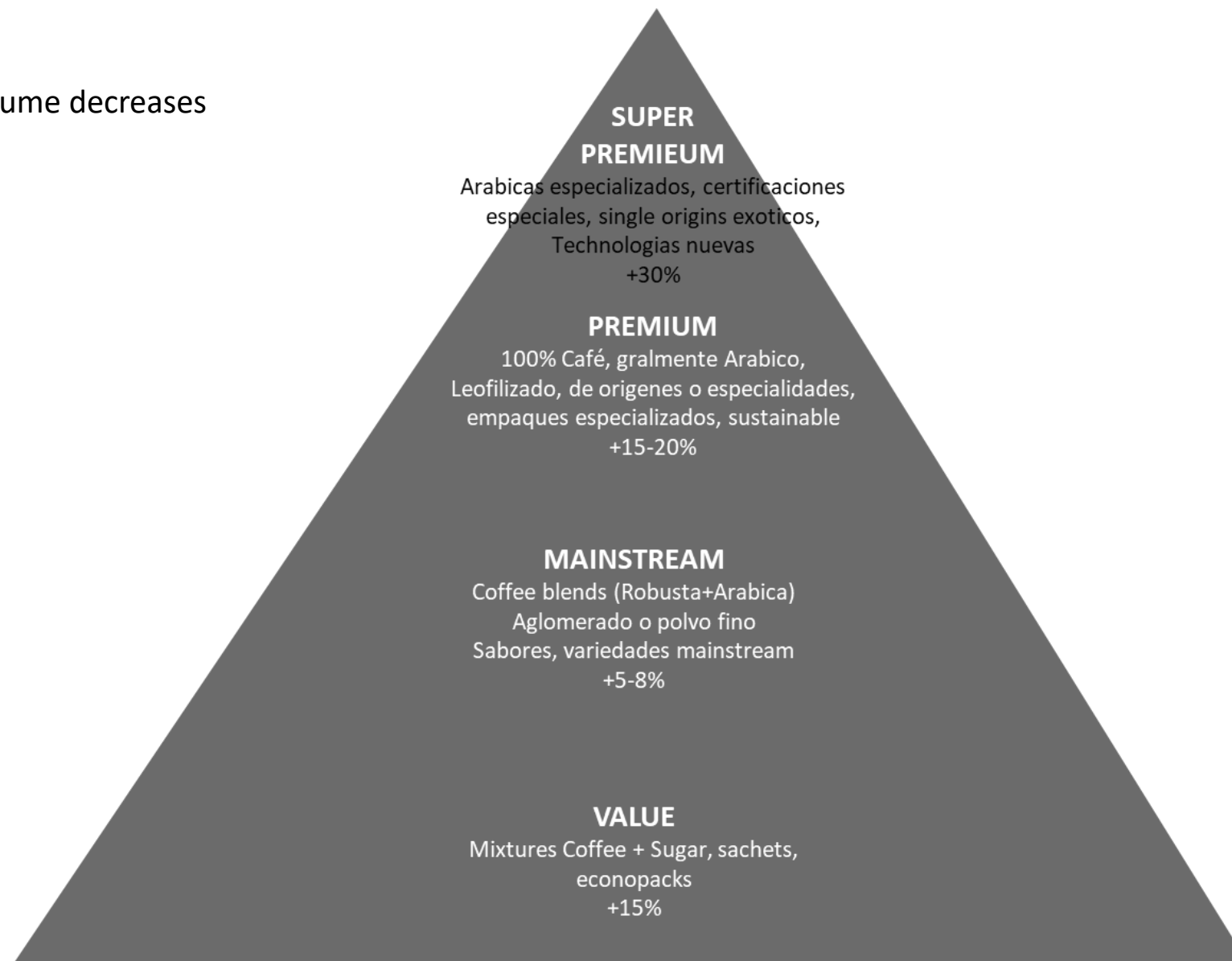
Coffee in LATAM: 53B category growing in value while rebalancing from IH to OOH



GENERAL VALUE SEGMENTATION

TASTE
ODYSSEY

- As pricing increases, volume decreases



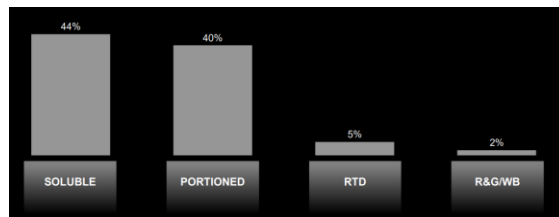
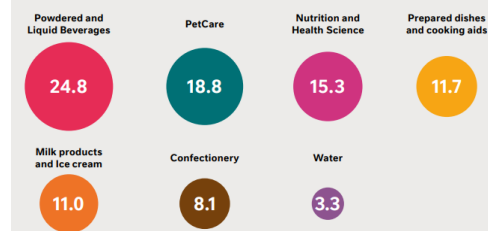
COMPETITIVE LANDSCAPE

TASTE
ODYSSEY

- NESTLE& STARBUCK are the biggest coffee buyers in the world.



What we sell (in CHF billion)



Total Rev : 2023 CHF93 bi (15% Coffee)



Total Rev : \$32 bi (2022)

Products	Coffee beverages • smoothies • tea • baked goods • sandwiches
Revenue	▲ US\$32.25 billion (2022)
Operating income	▼ US\$4.62 billion (2022)
Net income	▼ US\$3.28 billion (2022)
Total assets	▼ US\$27.98 billion (2022)
Total equity	▼ US\$-8.70 billion (2022)
Number of employees	ca. 402,000 (2022)
Subsidiaries	Starbucks Coffee • Ethos Water • Hear Music • La Boulange Bakery • Teavana Torrefazione Italia • Tata Starbucks (India)

COMPETITIVE LANDSCAPE

TASTE
ODYSSEY

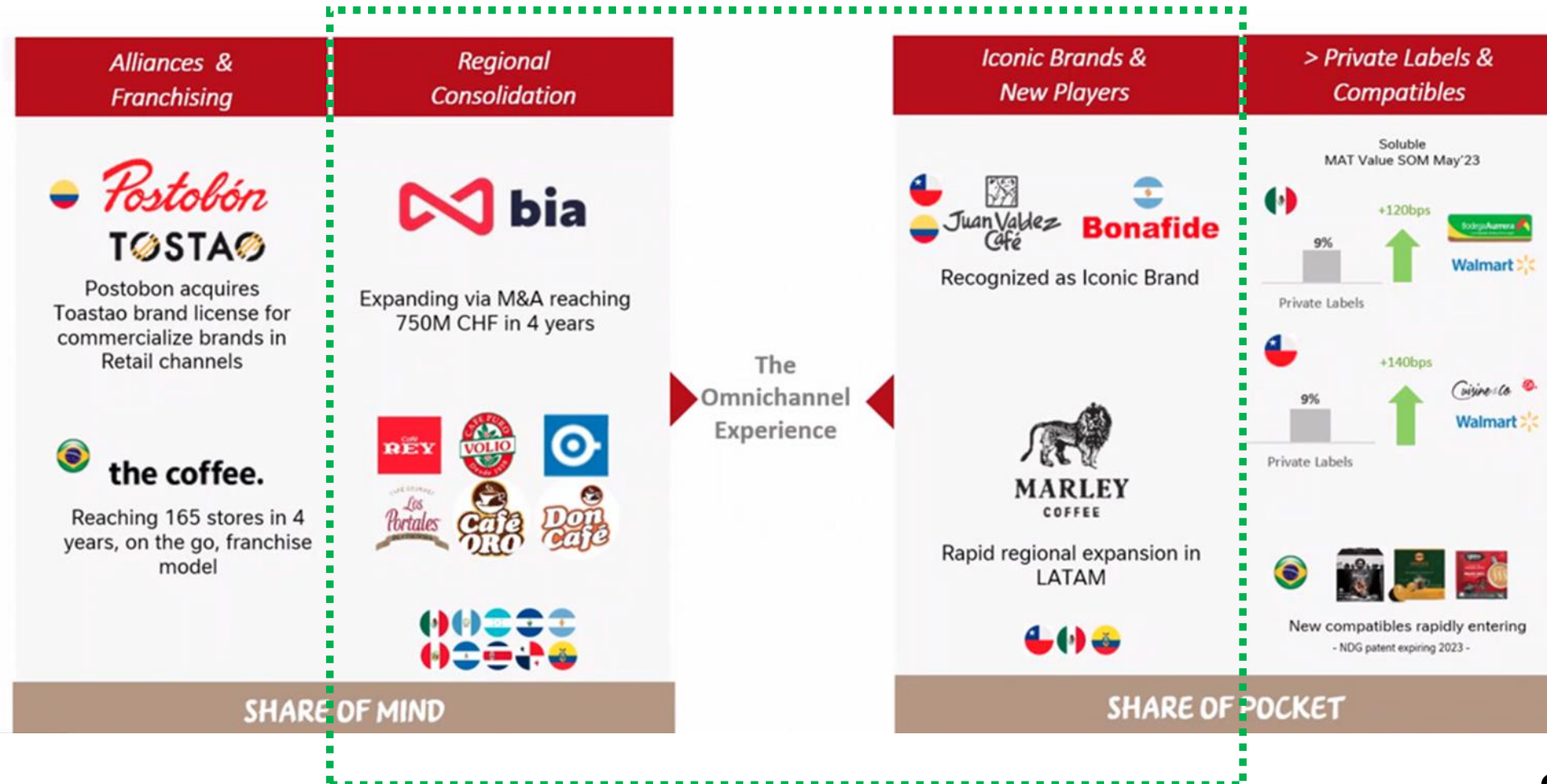
- BIA Opportunity- expanding our local/regional Coffee heritage as the regional HERO



BIA acting as an accelerator to consolidate, protect and grow regional/local brands

COMPETITIVE LANDSCAPE: LATAM ZOOM

There is a big space to consolidate & growth

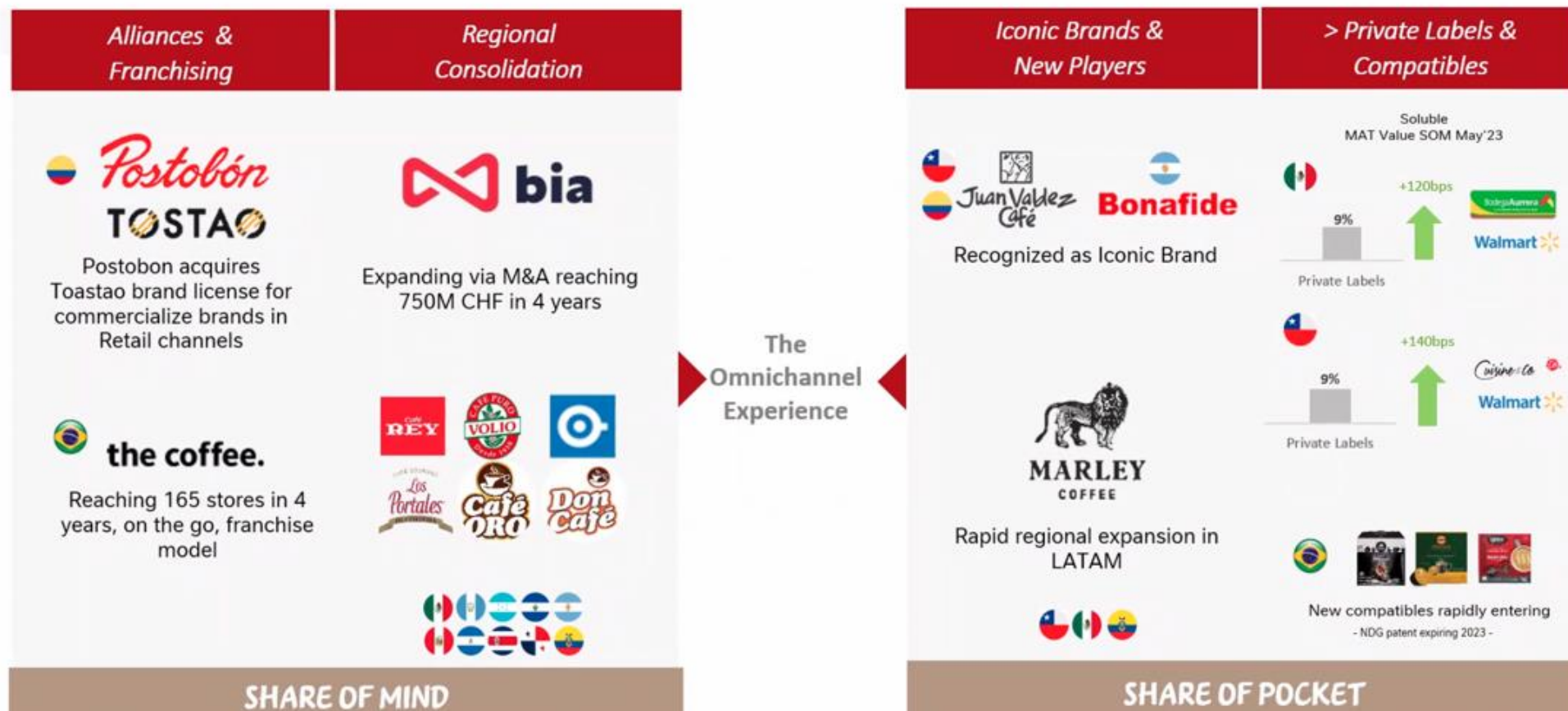


TASTE
ODYSSEY

COMPETITIVE LANDSCAPE

TASTE
ODYSSEY

The competitive landscape heats up: Small and large players intensify efforts in a dynamic and attractive category, adding more pressure to the actual context



KEY TAKEAWAYS

- A category driven by Green Coffee Cycle
- It is a big, attractive category with great space to grow in different segments
- It is a category that needs marketing investment to grow.
- Price Pack Architecture, SRM, Downsizing, upsizing , High & Low, are part of the Dynamic.
- Even though big multinationals dominate the landscape, there is a big opportunity to consolidate and grow regionally.
- Premium is the fastest growing segment.
- Affordable is gaining momentum in current inflationary times (high green coffee cycle)

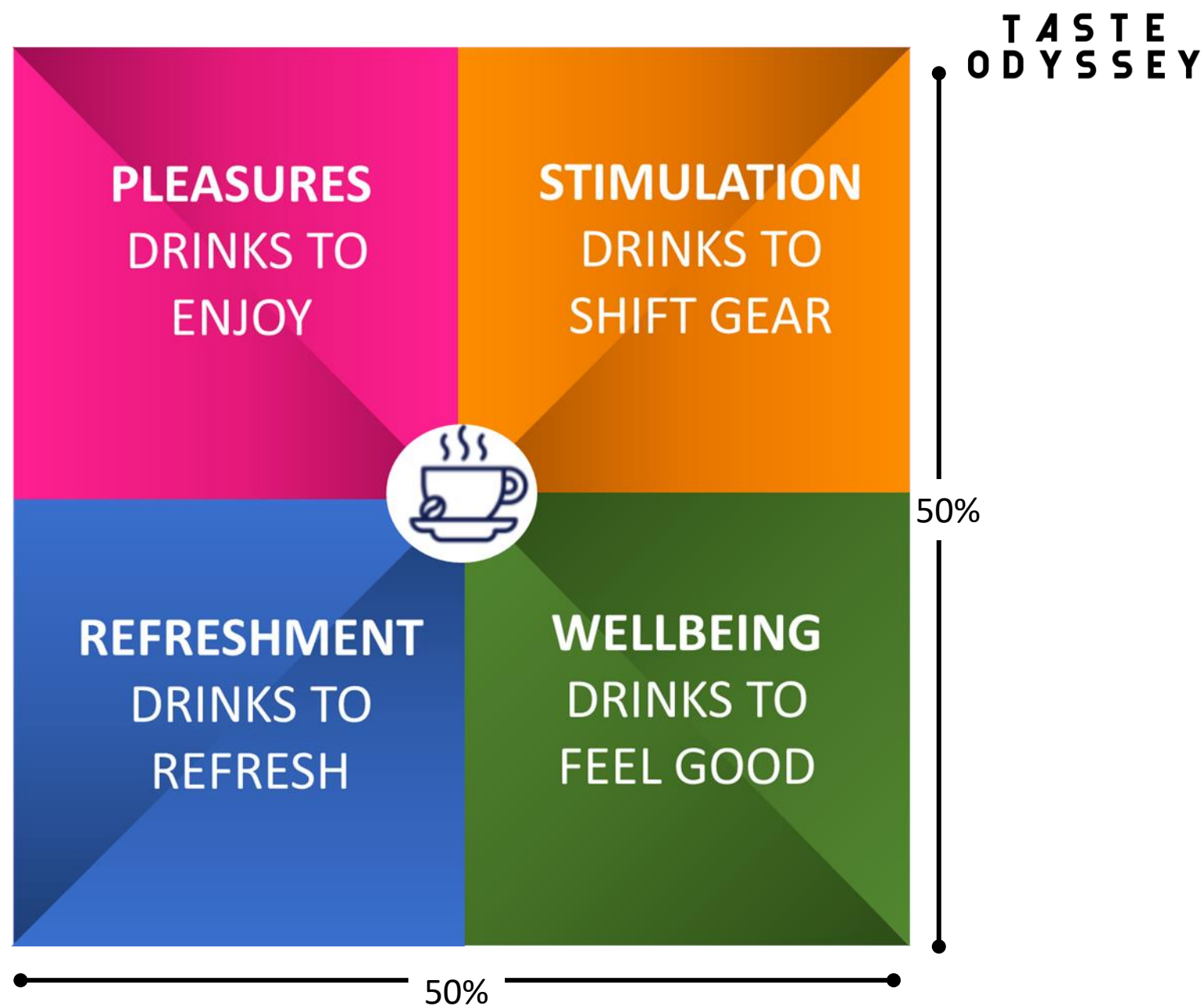


CONSUMER DEMAND MOMENTS



GLOBAL NEEDSTATES

4 Needstates
globally and
geographically that
motivates
consumer in
COFFEE



DEMAND MOMENTS

My Gentle Start
Breakfast Bonding
Social Mealtimes
My Time Out
Uplifting Connect
Evening Unwind

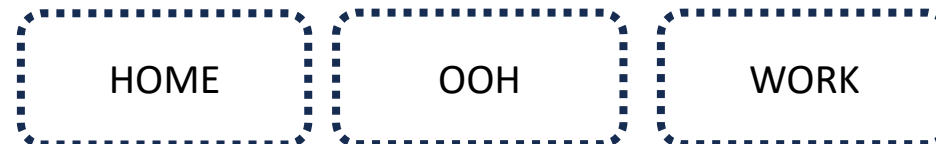
But First Coffee
Quick, Breakfast &
Let's Go
Social Break
Recharge At Home

Meal Refreshment
Thirst Quench
Vital Start
Healthy Meals
Healthy Hydration

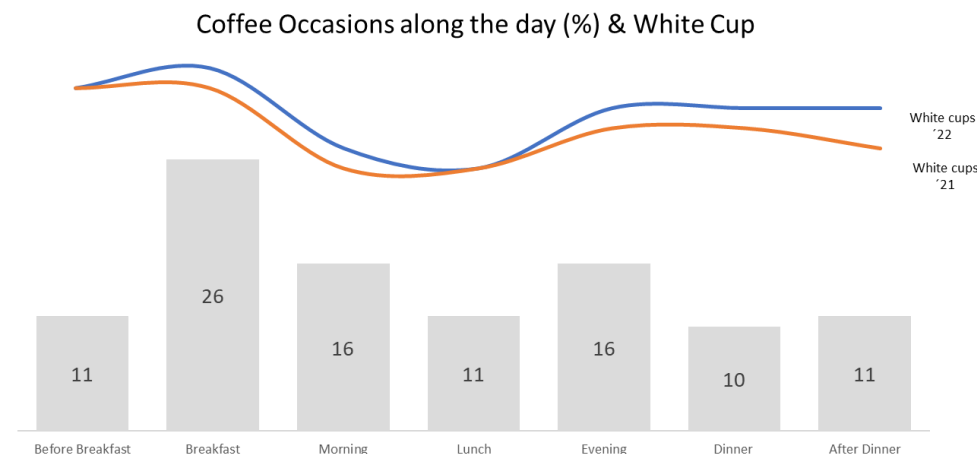
WHEN



WHERE



LATAM Current demand moments



White cups
growing
participation

% In Home

**COMBINING NEED
STATES & DEMAND
MOMENTS**

PLEASURES – 37%

PLEASURES
DRINKS TO
ENJOY
37%



DEMAND MOMENTS	37%	WHEN	WHERE
My Gentle Start	5%	Before Breakfast	HOME
My Gentle Start	5%	Before Breakfast	HOME
Breakfast Bonding	7%	Breakfast	HOME
My Time Out	2%	Mid Morning	OOH WORK
Uplifting Connect	3%	Mid Morning	OOH WORK
Social Mealtimes	6%	Lunch	HOME WORK
My Time Out	3%	Mid Evening	OOH WORK
Uplifting Connect	4%	Mid Evening	OOH WORK
Social Mealtimes	4%	Dinner	HOME WORK
Evening Unwind	3%	After Dinner	HOME OOH

STIMULATION – 39%



DEMAND MOMENTS

37%

WHEN

WHERE

But First Coffee	10%	Before Breakfast	HOME
Quick Breakfast & Let's Go	12%	Breakfast	HOME
Social Break	7%	Mid Morning	OOH WORK
Recharge at Home	5%	Mid Morning	OOH WORK
Recharge at Home	5%	Mid Evening	HOME WORK

WELLBEING – 14%



DEMAND MOMENTS

37%

WHEN

WHERE

Vital Start	3%	Before Breakfast	HOME
Vital Start	3%	Breakfast	HOME
Healthy Hydratation	2%	Mid Morning	OOH WORK
Healthy Meals	3%	Lunch	HOME WORK
Healthy Hydratation	2%	Mid Evening	OOH WORK
Healthy Meals	2%	Dinner	HOME WORK

REFRESHMENT – 37%

DEMAND
MOMENTS

37%

WHEN

WHERE

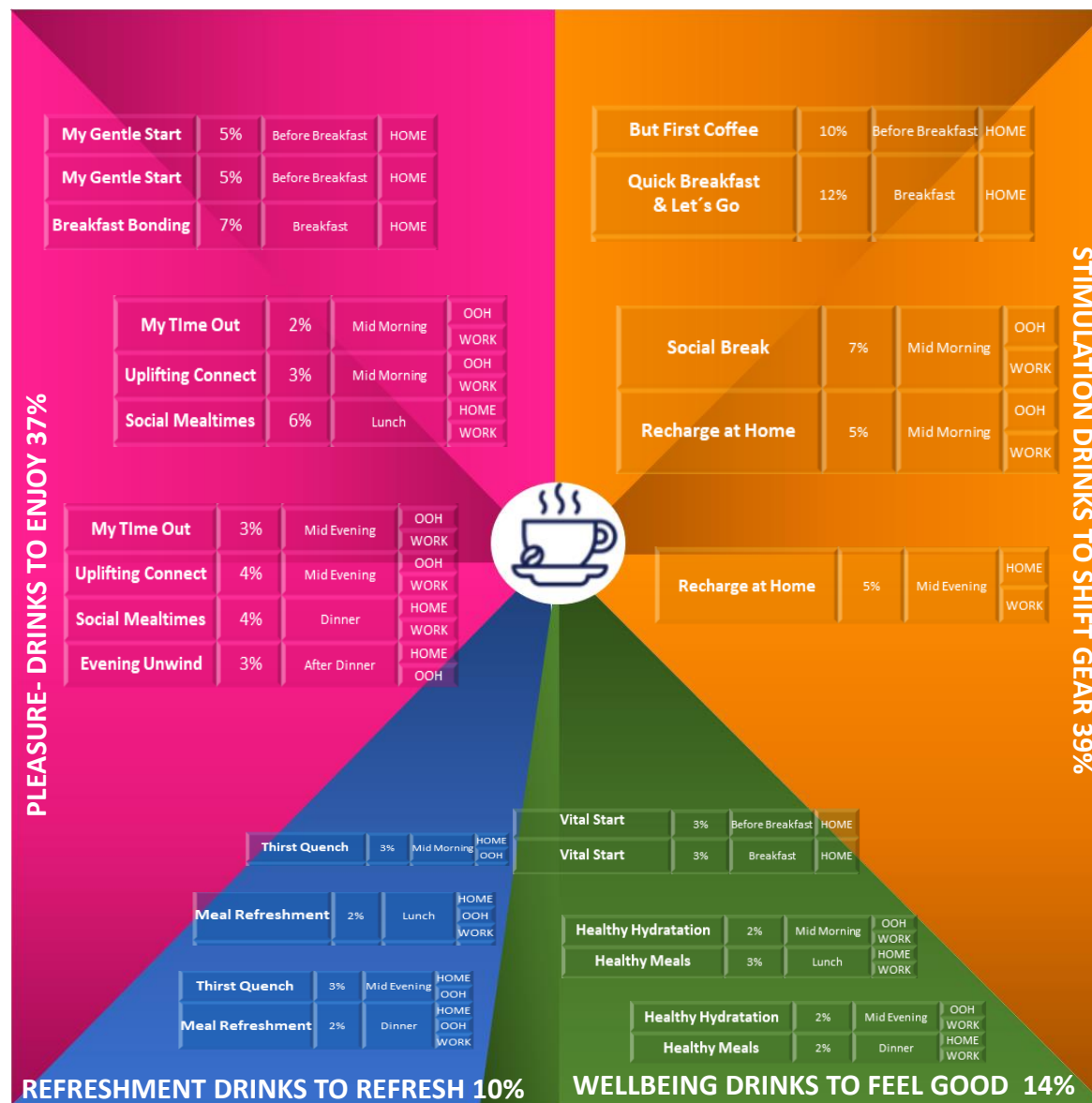


REFRESHMENT
DRINKS TO
REFRESH
10%

Thirst Quench	3%	Mid Morning	HOME
			OOH
Meal Refreshment	2%	Lunch	HOME
			OOH
			WORK
Thirst Quench	3%	Mid Evening	HOME
			ooh
Meal Refreshment	2%	Dinner	HOME
			OOH
			WORK

GLOBAL COFFEE DEMAND MOMENTS

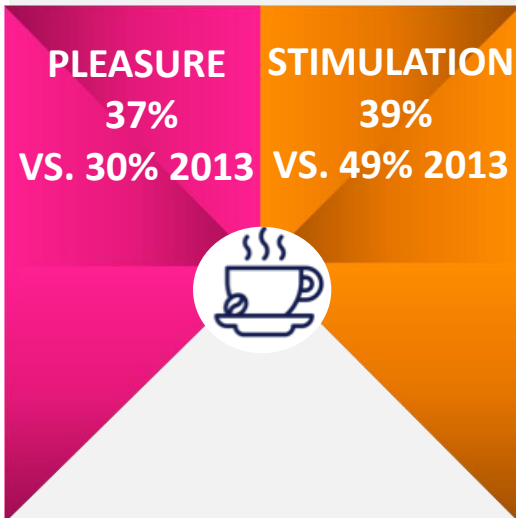
When we combine the Needstates (WHY) and Moments (WHO, WHEN, WHERE) we have the Coffee Demand Moments, it's easier to see in just one picture where the consumer is moving.



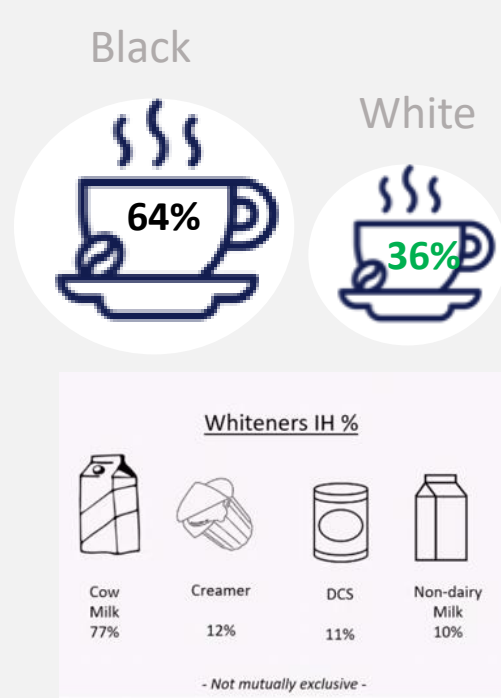
**TASTE
ODYSSEY**

PLEASURE IS GROWING FOR INDULGENT WHITE CUPS AMONG YOUNGSTERS IN LATAM

DEMAND MOMENTS

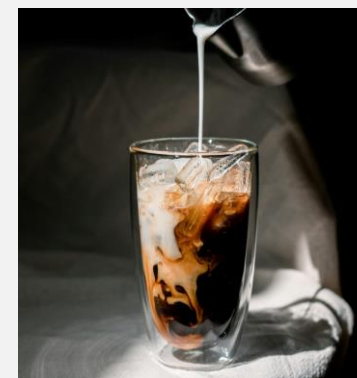


TYPES OF CUPS HOW?



YOUTH WHO?

	Consumption %	
	16-24 yrs	+25 yrs
Spoil myself	72%	65%
Flavors	29%	21%
White	41%	35%
Cold	18%	7%



TASTE
ODYSSEY



CONSUMER TYPOLOGY

CONSUMER TYPOLOGIES

TASTE
ODYSSEY



FAST
FAD-SION



COFFEE LOVER
CONNOISSEUR



STATUS
MATTERS



WELLNESS
LIFESTYLE



FRIENDLY,
SOCIABLE & COFFEE;
TO START THE DAY



TRADITIONAL
HOMEY

FAST FAD-SION

I like to live new experiences and have fun. I constantly check what is happening on social media and see the new trends. My image is very important. I drink coffee because it is trendy, and I always add milk, creamer or try a new flavor. My day is very busy so if I have coffee, I order it to go. I don't sacrifice good flavor, I like to eat and eat well.

(white cups, soluble mixes, added flavors, coffeeshop)



COFFEE LOVER CONNOISSEUR

I can't imagine a morning without a good cup of coffee, I enjoy this moment and makes me feel my 6 senses. I know that I have to pay for a good cup of coffee, it is worth it. I like to surround myself with friends who know about coffee and be able to share these experiences with them. I enjoy life through eating and drinking.

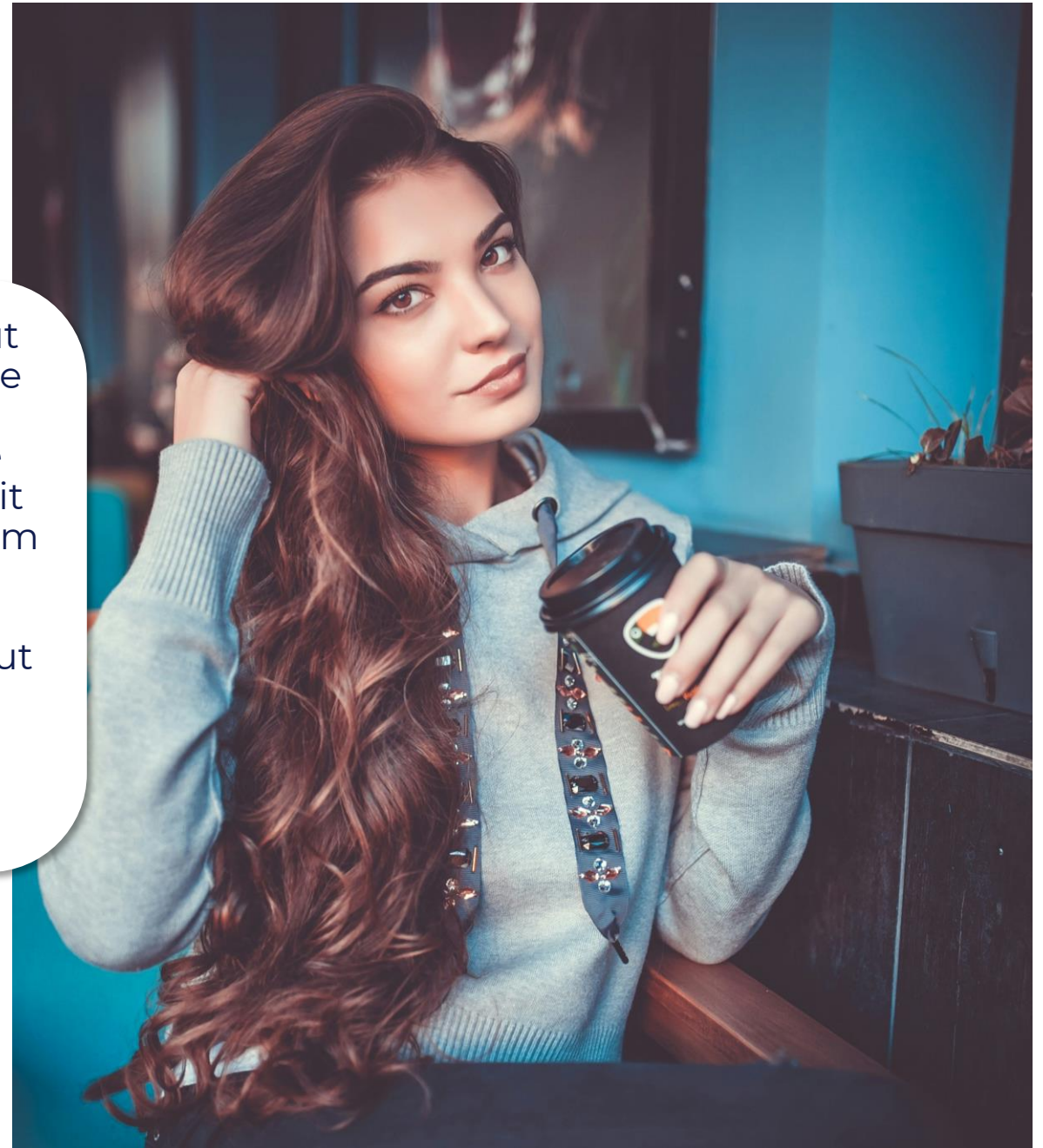
(Expressos, single origins, WB/R&G, sophisticated coffee machines)



STATUS MATTERS

I consider myself a trendy person, I care a lot about my image and how the people see me. Taking care of myself is part of my life, I choose well what I'm going to eat, and it has to be healthy. Most of the times I eat outside. My career is very important as it helps me maintain my status. People tell me that I'm a coffee addict and coffee is always the perfect excuse to socialize and connect with the others. I don't feel like an expert when it comes to coffee, but I know I have to pay for good coffee.

(Capsules, higher end coffeeshops, R&G reserves)



WELLNESS LIFESTYLE

My health & wellbeing is the most important thing for me, I always choose healthy food. I care about the planet and the future. I love to exercise. I drink coffee, but I´m more interested in my wellbeing and my body; I enjoy having a good coffee with good company.

(alternates Coffee with healthy beverages)



FRIENDLY, SOCIABLE & COFFEE; TO START THE DAY

I need coffee to start my day, I really need it. Don't love black coffee, so Coffee shops are my thing, it's my place to be with my friends and I get to choose different coffee choices.

At home I will choose simple solutions to start my day.

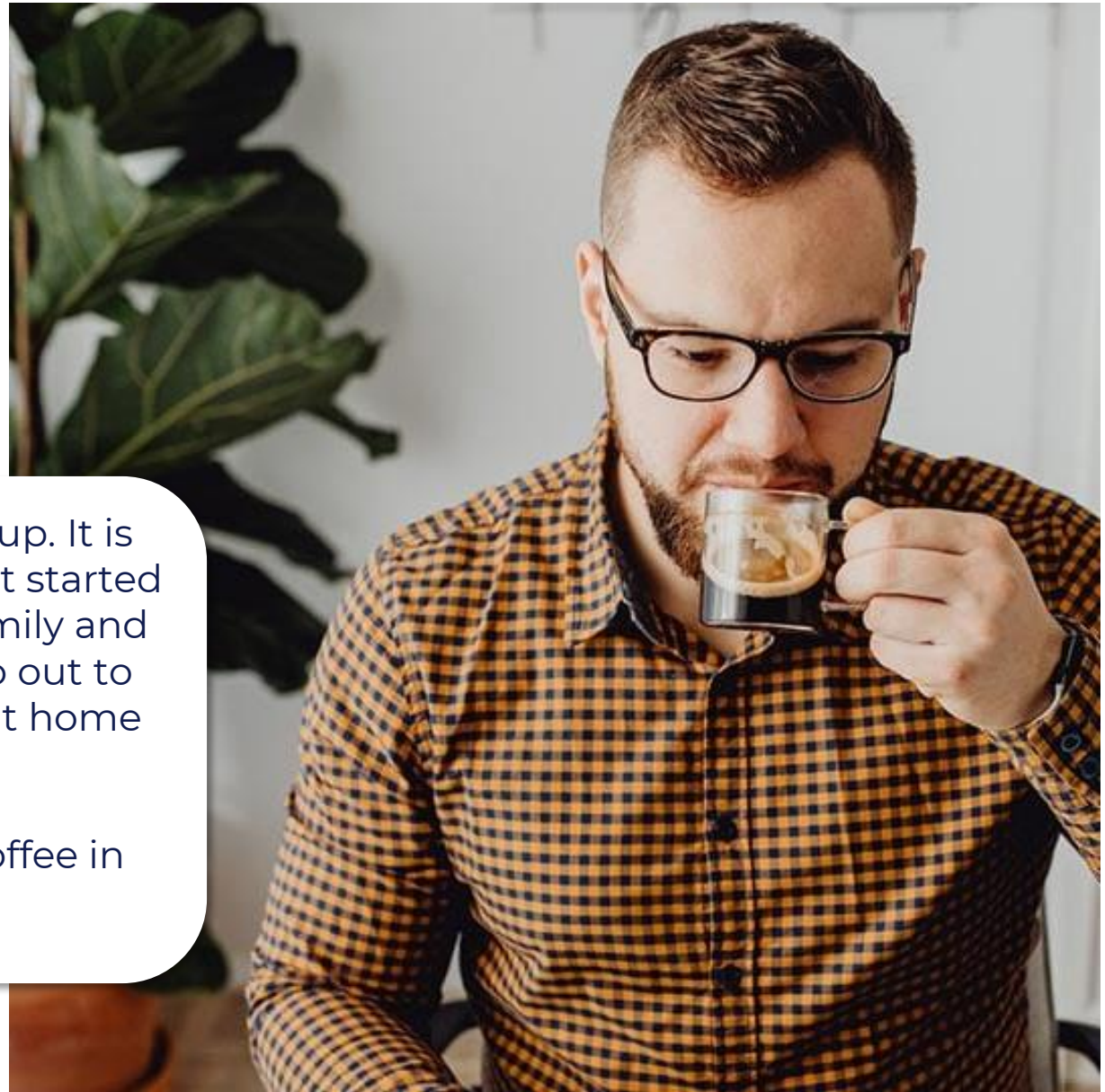
(Soluble mixes, white cups, RTD)



TRADITIONAL HOMEY

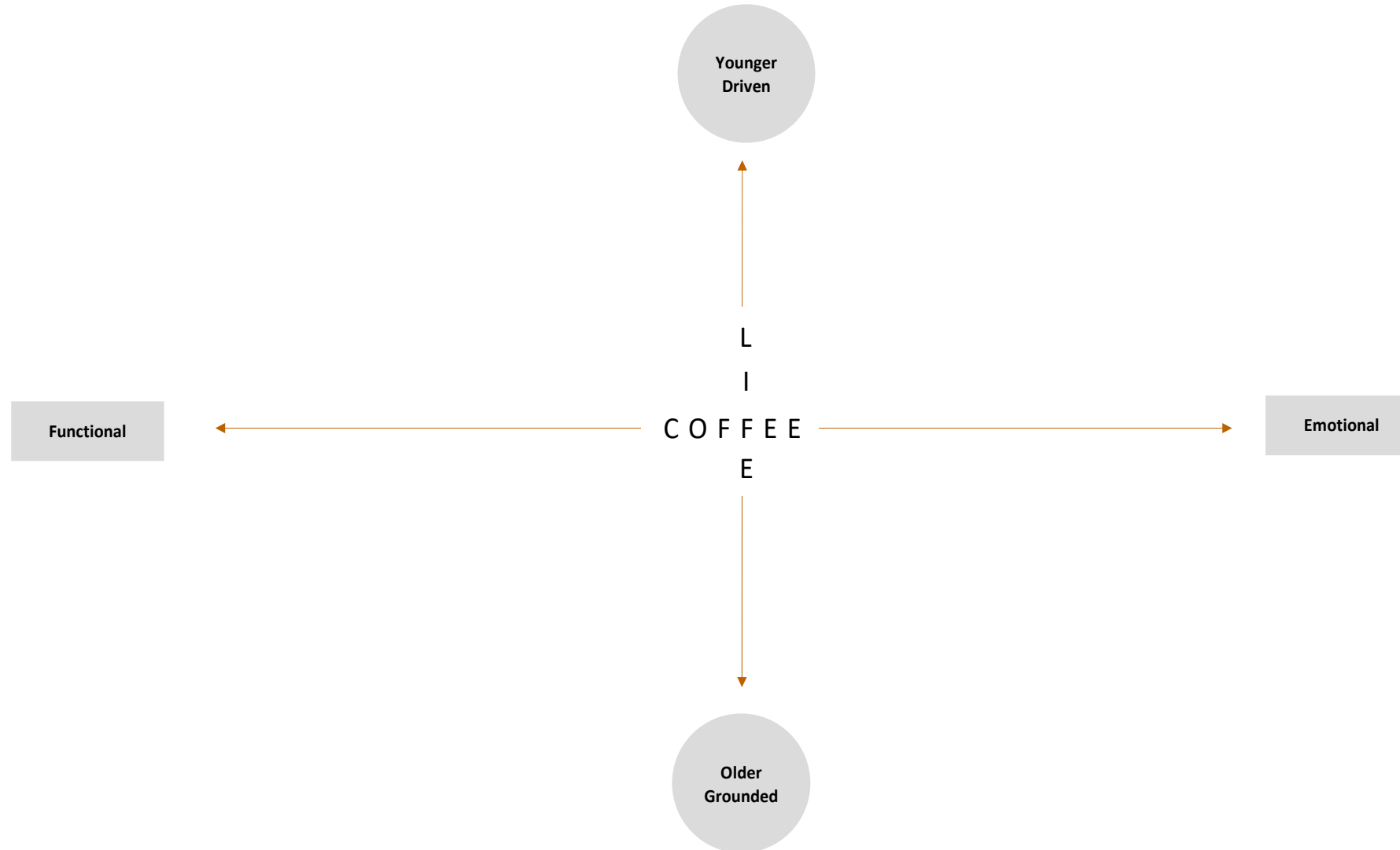
But first: Coffee; without it I won't wake up. It is part of my traditions to have “coffee to get started at home.” I really like sharing with my family and build good moments. Sometimes we go out to eat for a special event. But I rather stay at home and enjoy my coffee moments.

(Black cups, soluble or R&G, prepares coffee in traditional ways)



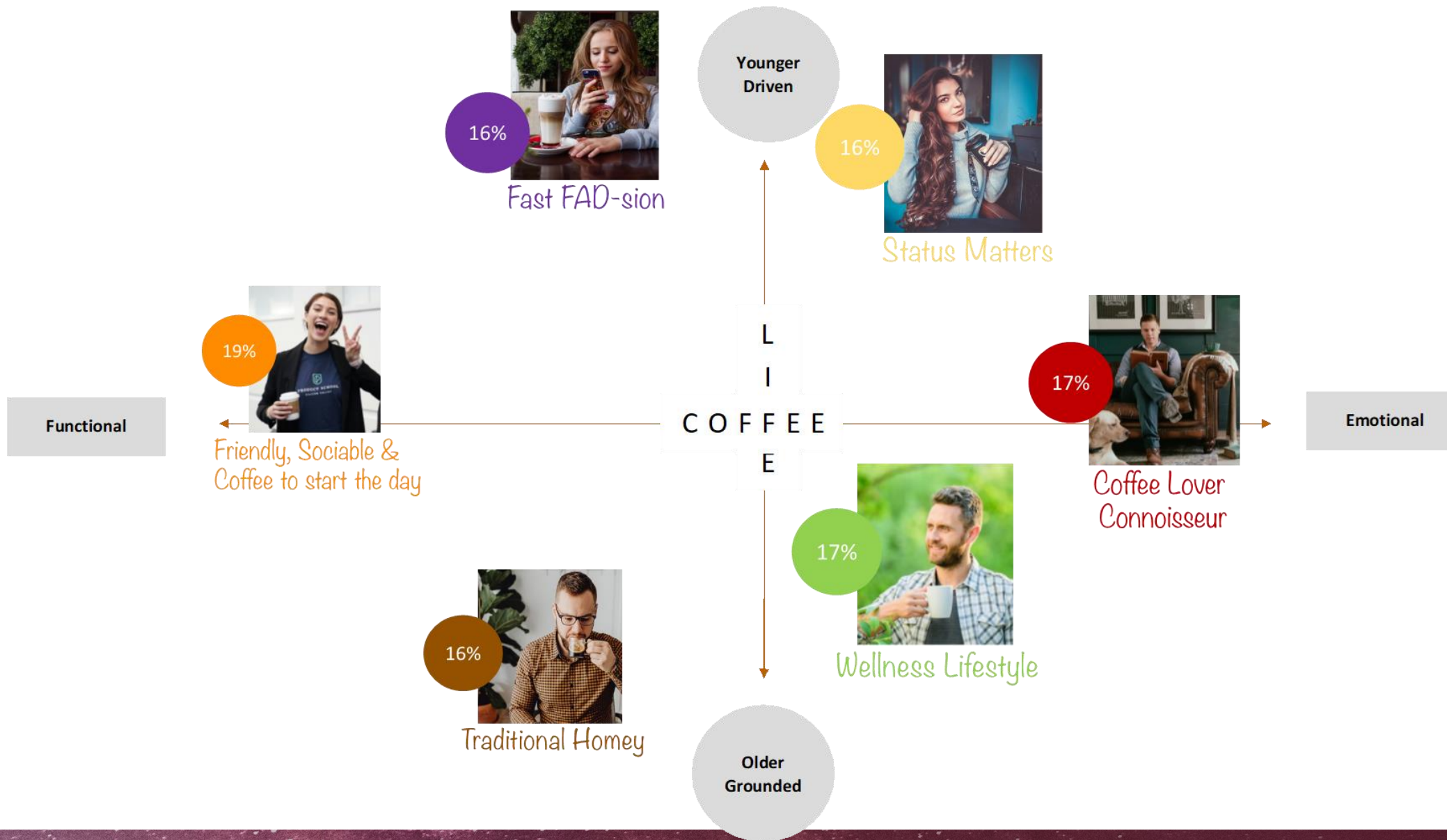
CONSUMER DIMENSIONS

TASTE
ODYSSEY



CONSUMER DIMENSIONS + TYPOLOGIES

TASTE
ODYSSEY



- There are **4 need states**. Historically Stimulation dominated the demand. Pleasure catching up fast.
- We have identified **7 demand Moments**, where the “morning” moments have been dominating consumption, but the mid day to evening moments growing faster.
- We have identified **6 consumer typologies** that cover all need states & demand moments. A consumer may adopt more than one typology and move across the need states
- Typologies may move from functional to emotional, & from Younger driven to more conservative.

CONTENT

STRATEGIC JOURNEY

01.

COFFEE FUNDAMENTALS (CAT)

- Coffee Cycle
- Need States & consumption moments
- Consumer Typologies
- All coming together

02.

CONSUMER TRENDS (CAT)

- Macrotrends & LATAM trends, Local Trends
- Benchmarks & competitors
- The Ecosystem

03.

BUT COFFEENESS FIRST (CAT)

- What is Coffeeness
- Coffeeness as a priority
- Consumer Centricity
- Priorities & Conclusions

04.

WHERE WE ARE (MKT)

- Current assessment
- What we are doing right
- What we need to fix
- Gaps & White spaces
- Our current KPI's

05.

WHERE WE WANT TO GO (CAT)

- Building our BIA COFFEE HOUSE
- Ambition per cluster
- Growth Pillars

06.

HOW TO GET THERE (MKT)

- Defend The Core
- Deploying key growth pillar
- Accelerate key enablers

CONSUMER GLOBAL TRENDS

TASTE ODYSSEY



PRODUCT KNOWLEDGE &
TRANSPARENCY IN
PRODUCTION

CELEBRATION OF
CRAFTSMANSHIP AND
SMALL BATCH
PRODUCTION

ORIGIN AS A MARK OF
CONNOISSEURSHIP

INVOLMENT IN
PREPARATION



PRODUCT AND PACKAGING
ENVIRONMENT IMPACT

SUPPLY CHAIN
TRANSPARENCY & FAIR
AGRICULTURAL PRACTICES

SUSTAINABLE PRODUCT

CLEAN LABELS



TREATS & INDULGENT
BEVERAGES

VARIETY OF COFFEE MENU &
POSSIBILITIES TO
PERSONALIZE

BREAK / "ME-MOMENTS" TO
RECONNECT

NEW (DIFFERENT CULTURAL)
AND NOSTALGIC TASTES

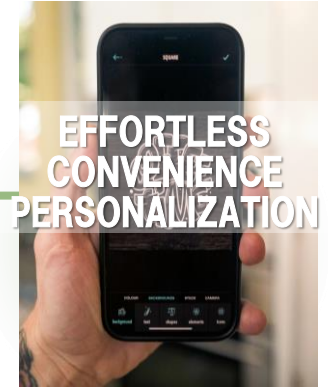
COFFEE SHOPS CREATE
MOMENTS



HEALTH EVOLVING BEYOND
A "ONE SIZE FITS ALL"

MOVE FROM "HEALTH" TO
CONCEPT OF WELL BEING

COFFEE TO DELIVER
ADDITIONAL BENEFITS (CBD,
MCT OIL, VITAMINS
PROTEIN...)



SPEED OF LIFE DUE TO
URBANIZATION

MOBILE / E-COM ADOPTION

DELIVERY OPTIONS

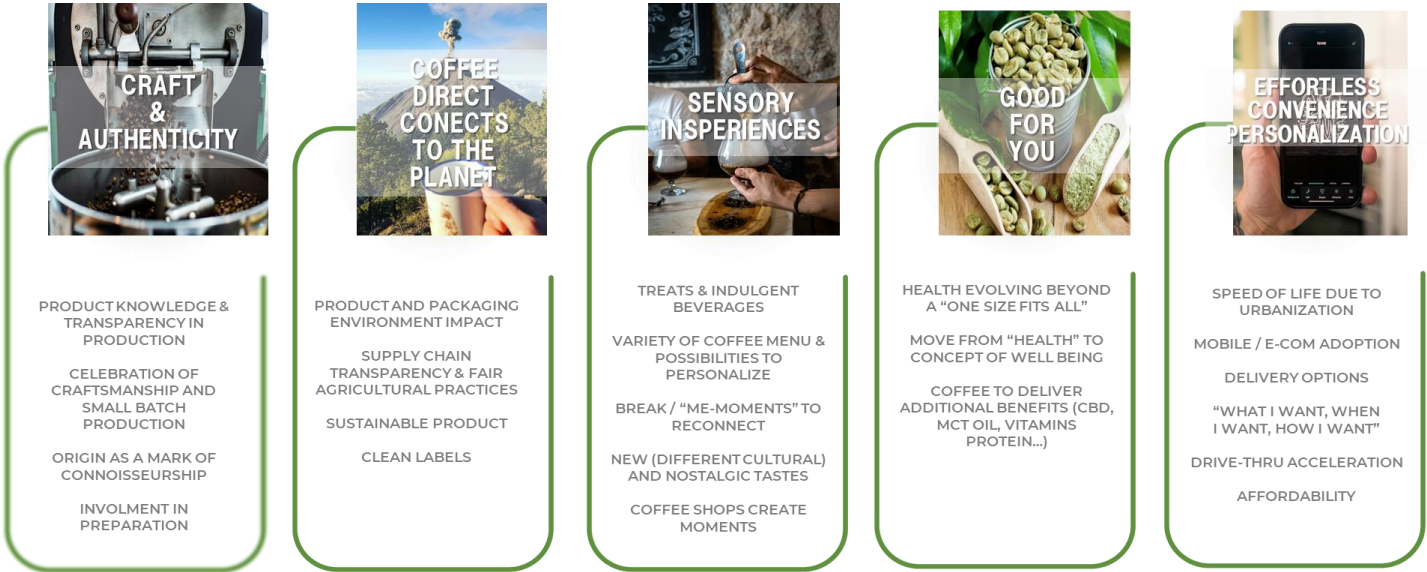
"WHAT I WANT, WHEN
I WANT, HOW I WANT"

DRIVE-THRU ACCELERATION

AFFORDABILITY

CONSUMER GLOBAL TRENDS

TASTE
ODYSSEY



are comparable to Mexico y CAM



CRAFT
&
AUTHENTICITY

PRODUCT KNOWLEDGE &
TRANSPARENCY IN PRODUCTION

CELEBRATION OF
CRAFTSMANSHIP AND SMALL
BATCH PRODUCTION

ORIGIN AS A MARK OF
CONNOISSEURSHIP

INVOLMENT IN PREPARATION





From
Classic



To
Local Origin

Using Authenticity to **accelerate Premium**

TASTE
ODYSSEY





TASTE
ODYSSEY

Born pure Authentic premium solutions



COFFEE
DIRECT
CONNECTS TO
THE PLANET

PRODUCT AND PACKAGING
ENVIRONMENT IMPACT

SUPPLY CHAIN
TRANSPARENCY & FAIR
AGRICULTURAL PRACTICES

SUSTAINABLE PRODUCT

CLEAN LABELS





Compostable

Nespresso
A pioneer of high-quality, sustainable coffee, Nespresso launched its first paper-based home and industrial compostable capsule in France and Switzerland, compatible with *Nespresso Original* machines.

Nescafé Dolce Gusto Neo
Piloted in Brazil and now launched in France and Switzerland, *Neo* is the next generation of *Nescafé Dolce Gusto* coffee systems, combining unique brewing technologies, connectivity and sustainability.

Recycle



Single-Use Innovation

30% post-consumer recycled content in fiber cups

Lightweight cold cups with **10-20% less plastic**

Core sleeves contain **85% recycled material**

Redesigned for a **strawless lid**

Fiber-based compostable cups in select markets



TASTE ODYSSEY

Sustainable



Starbucks Becomes First National Coffee Retailer to Accept Reusable Cups for Drive-thru and Mobile Orders

[READ MORE](#)



Lavazza ¡Tierra! Bio-Organic for Planet

Climate change represents a real threat to coffee: it might impact on coffee quality of the product and it's the cause of the gradual reduction of cultivated areas. Lavazza ¡Tierra! for Planet is a premium selection of organic Arabica from lands where Lavazza Foundation is teaching coffee producers agricultural techniques to manage the effect of climate change.

[DISCOVER MORE](#)



SENSORY INSPIRATIONS

TREATS & INDULGENT BEVERAGES

VARIETY OF COFFEE MENU &
POSSIBILITIES TO PERSONALIZE

BREAK / “ME-MOMENTS” TO RECONNECT

NEW (DIFFERENT CULTURAL) AND
NOSTALGIC TASTES

COFFEE SHOPS, CREATE MOMENTS





COFFESHOP

Coffee Shops Typologies

Drive-thru



Kiosk

In-Home

Mobile Sampling

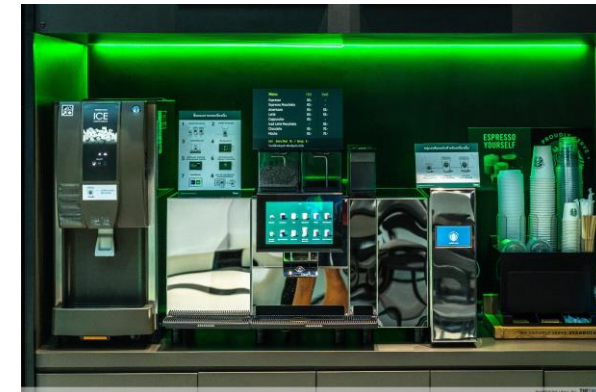
We bring our delicious beverages to your local venues, events and activities.



Make your event memorable with Starbucks. For inquiries on your event, please contact the nearest Starbucks or Customer Service.



Vending



TASTE ODYSSEY

Pop-Up Store



Coffee Shops



SENSORY
INSPIRATIONS

COFFESHOPS

Flagship Reserve

TASTE
ODYSSEY



COFFESHOPS



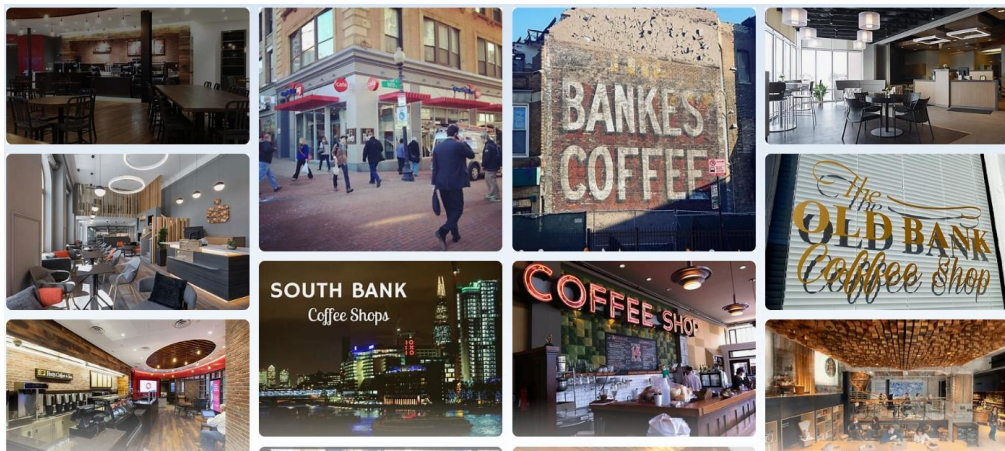
SENSORY
INSPIRATIONS

COFFESHOPS

Pop-Up



Tematic: Bank Coffeeshops



Café Truck



TASTE
ODYSSEY

"Más Café" revoluciona el concepto de Food Truck en Guatemala

Por Fredy Hernández
06 de junio de 2017, 06:00



SENSORY INSPIRATIONS



Drive-thru



Vending



TASTE ODYSSEY



SBUX LEADING THE WAY THE INSPIERENCES AT SCALE WITH ITS ECOSYSTEM



Valuing up accelerating PREMIUM

R&G

Blends | Single Origin | Tuestes



COFFEE SYSTEM
Machines | Cápsulas



SOLUBLE
Premium Instant

Presence in most countries

- Formatos Flexibles 4 presentaciones
- Distribución CBC foco cobertura a través de bonificación
- Comunicación reforzando sabor y esencia local

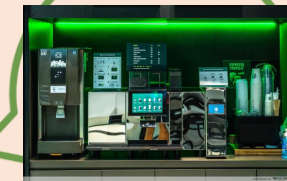


Holistic Integration



SHOPS

50 puntos de venta en GT



OOH

Hotels | Restaurantes & RTD



100% Responsible Sourced

SENSORY
INSPIRANCES

BUILDING OUR OWN ECHOSYSTEM

GUATEMALA



TASTE
ODYSSEY

MEXICO



SENSORY INSPIRATIONS

VARIETY SEASONAL

Winter



Iced Hazelnut Oatmilk Shaken Espresso Pistachio Latte Pistachio Cream Cold Brew

Valentines



Chocolate-Covered Strawberry Crème Frappuccino® Chocolate Hazelnut Cookie Cold Brew



Rouge Opera Frappuccino® Blended Cream



The Stanley x Starbucks mug

TASTE ODYSSEY

Spring



Buttercup Shaken Espresso



Caramel Coconut Cold Brew

Summer



Mango dragonfruit with lemonade



Honeycomb salted caramel oatmilk latte

Fall



Pumpkin Espresso Shaker



Holidays



Iced Gingerbread Oatmilk Chai



Peppermint Mocha



Iced Sugar Cookie Almondmilk Latte



Ho Ho Mint Mocha Espresso Shaker Vanilla Oat Nog Latte



Gingerbread lattes, Hazelnut frostinós

SENSORY INSPIRATIONS

COLD-BREW



DIFFERENT FLAVORS



READY TO DRINK

TASTE ODYSSEY



Nescafé nueva línea de café listo para beber en Europa

Comunicado. Nescafé dio a conocer el lanzamiento de su última línea de productos en toda Europa, llamada NESCAFÉ Barista Style. Esta línea de café listo para beber (RTD) se inspira en las cafeterías y ofrece cuatro sabores diferentes: Cappuccino, Latte, Caramel y Americano. Cada mezcla está cuidadosamente elaborada con granos de café seleccionados de calidad, leche fresca y toques de sabor, creando un delicioso equilibrio de sabores.



Juan Valdez incursiona en el mercado de las bebidas "ready to drink"

Está lanzando un café frío listo para consumir.

COFFEE SHOP IN-HOME

Nescafé Dolce Gusto launches *Neo*, its next generation 'Coffee Shop at Home' experience

Neo's proprietary technology and home-compostable pods create the brand's best coffee quality and most sustainable system to date



TASTE ODYSSEY

CAFECORE IN-HOME



Cafécore

This year, we'll be bringing the coffee shop aesthetic into our homes, according to [Pinterest Predicts' 2024 report](#). The platform reported a surge in searches for Cafécore: searches for 'coffee bar styling' are up by 1,125 percent, 'coffee station decor' by 145 percent, and 'cafe aesthetic' by 820 percent. Think jazzy [home espresso machines](#), syrup stations, pretty mugs, the lot.

TASTE
ODYSSEY

GOOD
FOR YOU

HEALTH EVOLVING BEYOND A
“ONE SIZE FITS ALL”

MOVE FROM “HEALTH” TO
CONCEPT OF WELL BEING

COFFEE TO DELIVER ADDITIONAL
BENEFITS (CBD, MCT OIL,
VITAMINS, PROTEIN...)

GOOD
FOR
YOU

Functional Ingredients



MEDIUM ROAST CBD COFFEE | INTRO STRENGTH 4MG CBD

Share

DESCRIPTION

Strava's Medium Roast Intro Strength CBD Coffee is a blend that showcases the appeal of specialty craft coffee. Roasted in small batches and precision infused with 4mg of organic broad-spectrum hemp cannabinoids per serving, the result is a unique coffee experience that is both complex and smooth. With hints of milk chocolate and black cherry, our Medium Roast is a delightful coffee sure to appeal to coffee lovers interested in adding CBD to their daily routine, without causing any unpleasant jitters.

TASTE
ODYSSEY

Mix Ingredients



Hemp coffee is a mixture of hemp seeds from the **Cannabis sativa plant and coffee beans**, which are typically organically grown. People might drink this beverage for its nutty flavor and health benefits of omega fatty acids.

What Is Hemp Coffee? (with pictures) - Delighted Cooking

www.delightedcooking.com/what-is-hemp-coffee.htm

TASTE ODYSSEY

EFFORTLESS
CONVENIENCE
PERSONALIZATION

SPEED OF LIFE DUE TO URBANIZATION

MOBILE / E-COM ADOPTION

DELIVERY OPTIONS

“WHAT I WANT, WHEN
I WANT, HOW I WANT”

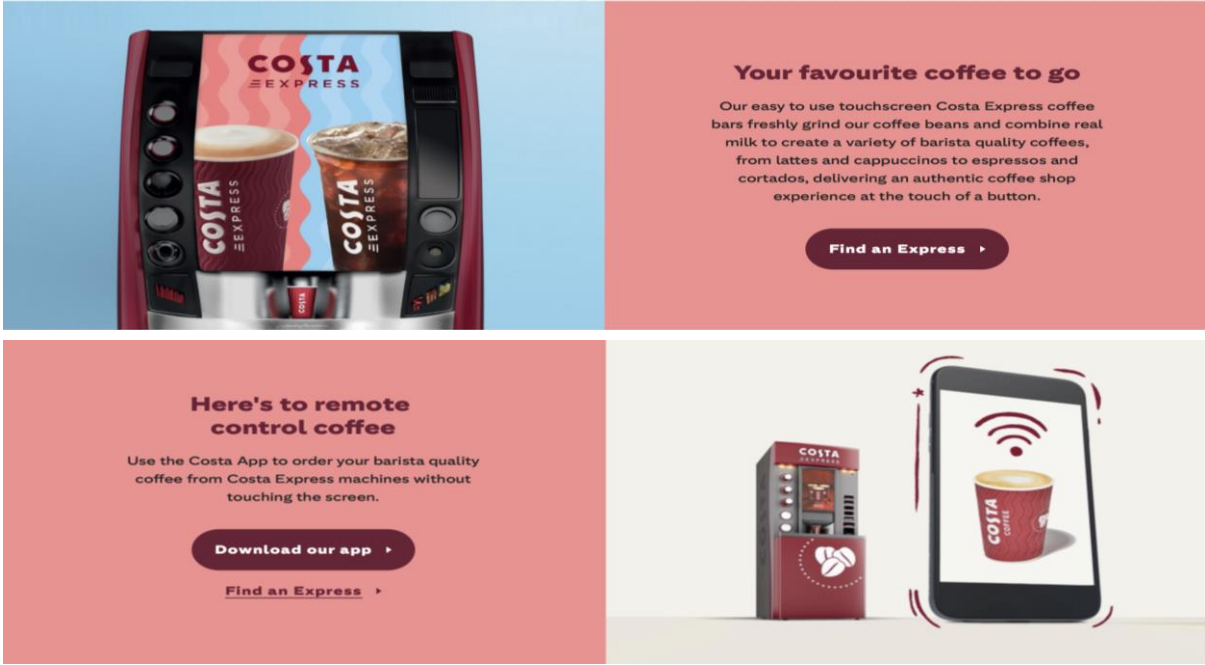
DRIVE-THRU ACCELERATION

AFFORDABILITY





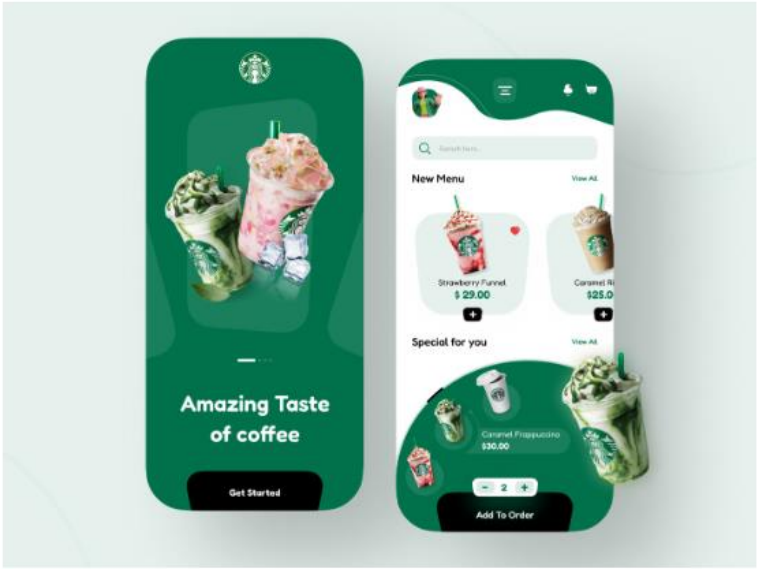
Easy steps to order from your Phone



TASTE ODYSSEY

Apps connected to shops moving to subscription and push offerings

A Seamless Mobile Experience:



Starbucks has invested heavily in developing a mobile app that offers customers a seamless and user-friendly experience. From the moment customers download the app, they are greeted with a visually appealing interface and intuitive navigation. Whether it's browsing the menu, customizing their orders, or locating nearby stores, Starbucks has prioritized convenience and simplicity.

All players investing to connect with their consumers to offer “the perfect coffee for you”



Private Brands



Single Serving



Value for Money



TASTE
ODYSSEY

CONTENT

STRATEGIC JOURNEY

01.

COFFEE FUNDAMENTALS (CAT)

- Coffee Cycle
- Need States & consumption moments
- Consumer Typologies
- All coming together

02.

CONSUMER TRENDS (CAT)

- Macrotrends & LATAM trends, Local Trends
- Benchmarks & competitors
- The Ecosystem

03.

BUT COFFEENESS FIRST (CAT)

- What is Coffeeness
- Coffeeness as a priority
- Consumer Centricity
- Priorities & Conclusions

04.

WHERE WE ARE (MKT)

- Current assessment
- What we are doing right
- What we need to fix
- Gaps & White spaces
- Our current KPI's

05.

WHERE WE WANT TO GO (CAT)

- Building our BIA COFFEE HOUSE
- Ambition per cluster
- Growth Pillars

06.

HOW TO GET THERE (MKT)

- Defend The Core
- Deploying key growth pillar
- Accelerate key enablers

What is BIA Coffeeness:



“The science & Art of enhancing COFFEE as the hero, lead role, principal, champion and savior of all touch-points through the purchasing path from the unique consumer lens, appealing to all senses”



It applies to, but not limited to:

Product descriptions, product shots, packaging, consumer communication, POS material, menus, coffeeshops, billboards, BTL activities/experiences , story telling, training, sampling, promotions, etc.

Its all about the COFFEE

COFFEENESS

HOW DOES IT LOOK LIKE

TASTE
ODYSSEY

COFFEE as the HERO



COFFEE in a secondary role



COFFEESHOP COFFEENESS

TASTE
ODYSSEY

COFFEE as the Coffeeshop HERO



COFFEE as a supporting role



Who is doing it right?

Industry examples

TASTE
ODYSSEY

HIGH COFFEENESS



LIMITED COFFEENESS



TASTE ODYSSEY



M&A Pipeline Overview



Consolidate key regions (CAS) and accelerate US

PRIORITIES & CONCLUSIONS

TASTE
ODYSSEY

Current priorities?

RENOVATE our Core
Business

Accelerate PREMIUM

Accelerate FUNCTIONAL

Accelerate COFFEESHOPS

Build the future

Address WHITE CUP opp?

Address RTD?

Address COLD opportunity?

Cold Brew?

ACCELERATE EFFICIENCIES TO FUEL GROWTH

COFFEE EXPERTS (PEOPLE)

Best in class
COFFEENESS

Best in class
COFFEENESS

Q U E S T I O N S A N S W E R E D

01.

**Is it a relevant
category to play?**

02.

**What are the
category dynamics
& who is the
benchmark?**

03.

**Why, When & Who
are the Coffee
consumers**

04.

**What are the most
relevant trends for BIA
& where should we
focus?**



CONTENT

NEXT SESSION

01.

COFFEE FUNDAMENTALS (CAT)

- Coffee Cycle
- Need States & consumption moments
- Consumer Typologies
- All coming together

02.

CONSUMER TRENDS (CAT)

- Macrotrends & LATAM trends, Local Trends
- Benchmarks & competitors
- The Ecosystem

03.

BUT COFFEENESS FIRST (CAT)

- What is Coffeeness
- Coffeeness as a priority
- Consumer Centricity
- Priorities & Conclusions

04.

WHERE WE ARE (MKT)

- Current assessment
- What we are doing right
- What we need to fix
- Gaps & White spaces
- Our current KPI's

05.

WHERE WE WANT TO GO (CAT)

- Building our BIA COFFEE HOUSE
- Ambition per cluster
- Growth Pillars

06.

HOW TO GET THERE (MKT)

- Defend The Core
- Deploying key growth pillar
- Accelerate key enablers



HAS THE PERFECT COFFEE FOR YOU