



# Algrano Market Review

*European Roaster Trends 2021*

S Ritson Consulting

## Introduction

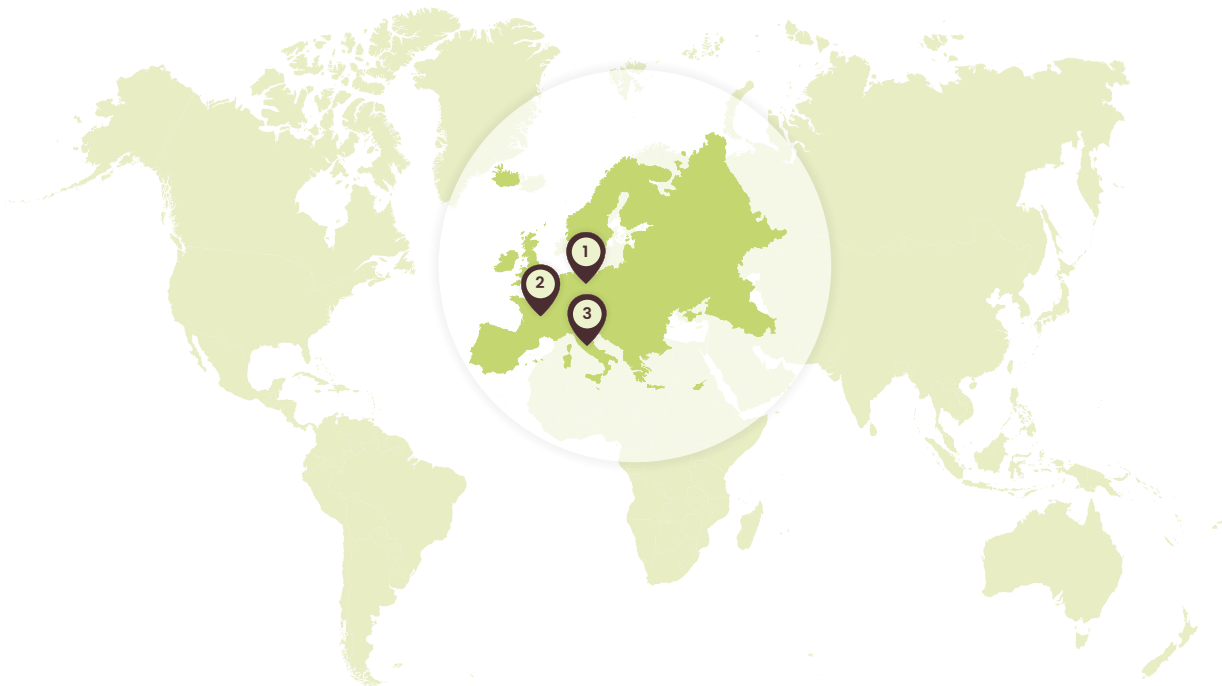
This document is to be used as a reference for the state of the European Coffee and Specialty Coffee market of 2020 and a prediction for the coming year(s). This market review contains the outcomes of a survey undertaken in November through December 2020 and, in addition, 12 interviews that the author (Stuart Ritson) undertook over this same time period. Along with the outcomes are a series of analyses made by the author. This document is intended to be the basis for a series of market review documents that can be given to producers and exporters by Algrano.

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## Overview of the European Coffee Market

The European coffee market represents around 35% of the total consumption of coffee in the world. It is in fact, the largest coffee consuming market globally. With approximately 6.9% of the global population and around 25% of all global wealth, Europe represents a captive consumer market. Longstanding cultures of coffee drinking also cement Europe's role in the consumption of coffee worldwide. At present, Western Europe accounts for around 26% of global consumption and Eastern Europe another 10%. The largest single market in Europe is Germany, followed by France and then Italy.



With a long history of coffee consumption, Europe has grown some of the world's most established coffee roasting companies. Of the ten largest coffee roasters in the world, half can be identified as European brands: Nestle SA, Jacobs Douwe Egberts, Lavazza SpA, Strauss Coffee and Tchibo GmbH. In spite of Europe being the base for so many large coffee companies, there is no monopolization of the marketplace. In fact, where the USA has around 9,000 Starbucks cafes, Europe has as few as 2,700. No single coffee business or chain can be said to represent the plurality of the European coffee market. The reason for this lack of monopolization is the prevalence of many smaller, localized coffee businesses throughout European countries and cities. In the past, these businesses were more focused around cafes and the serving of coffee, but in the last 10 to 20 years, we have seen a massive growth in the number of small roasting operations to complement the existing café culture. The broad range of coffee businesses – both large scale manufacturing operations as well as many boutique roasters – makes the European market a dynamic place to do business. Within the plurality of coffee businesses in Europe, producers will undoubtedly be able to find business partners who are interested in their products regardless of the scale, price point or other features of their business.



## Key Outcomes from the Market Review:

Below are a list of key thoughts and outcomes from the Market Review, which are explained in much more detail throughout the whole document:

- Cup quality remains and will continue to remain, the single most important factor in why a coffee roaster purchases a coffee.
- Coffee roasters are broadly optimistic about their businesses and the year ahead.
- The year 2020 has seen dramatic rises in e-commerce sales, with figures of around 400% growth in e-commerce retail sales by roasters considered typical.
- Brazil, Colombia and Ethiopia are the three main suppliers for the European coffee market.
- A rise in home user skill and experience will likely cause a surge in demand for higher quality coffee in all arenas of life.
- While roasters are happy to pursue digital forms of communication and contact, they almost universally plan to travel to visit coffee producers as soon as is reasonable.
- Specialty coffee can be priced up to \$12.00 per kg before any additional special marketing considerations have to be made. Beyond this point the audience for any given coffee will begin to decrease rapidly. Beyond a price point of \$25.00 per kg, producers should consider the marketability of their coffee in much more detail.
- The areas of greatest potential for investment by coffee producers and exporters, based on this survey, were rare varieties and lots separated out as produced exclusively by female farmers. Secondly, anaerobic processes and young producer separated lots also seem to be growing trends for roasters. There is also clear indication that roasters are still interested in trying new processing methods and exploring new coffee profiles.
- Roasters place a lot of significance on farmers being paid fairly but are not necessarily confident that their own farmer/producer partners are in fact being paid well.
- Roasters are very keen to travel to visit producers when it is possible. However, the COVID process has normalized digital forms of contact between roasters and producers. With this in mind, producers may want to consider hosting 'digital farm visits' as a way to engage with roasters until travel can be resumed and even after.

## **Analysis and Outcomes**

### **Survey Validity**

*This document is based on results taken from 22-December-2020.* At the point of publication of this market review document, the survey received responses from 15 different European Countries. Respondents reported working on machines with a capacity as low as 2kg all the way to multiple roasters working with machines over 70kg. What the author assumes based on responses about roaster capacity, is that the survey covers roasters of an exceptional small size as well as those doing millions of Euros in coffee sales. As such, the survey and interview series represent a good number of roasters and a variety of roasting businesses. However, the survey results are not strong enough empirically to be used as anything nearing a scientific data set. Nevertheless, this data set points towards larger trends, which the author feels would be substantiated by further research.

### **Note on Reproducing this Survey in Future**

As a note, the author believes that if this process was repeated in the future, he would advise releasing and promoting the survey at the end of October or early November period. Consistently, the author found that roasters did not have time to be interviewed and more than that, even to undertake the 10-15 minute long online survey. There was a sense that because of the workload around Christmas, roasters could not divulge time to any other activity than the fulfilment of orders. As such, the author notes that the end of the year was not the most effective time for the conducting of this survey.

### **Analysis**

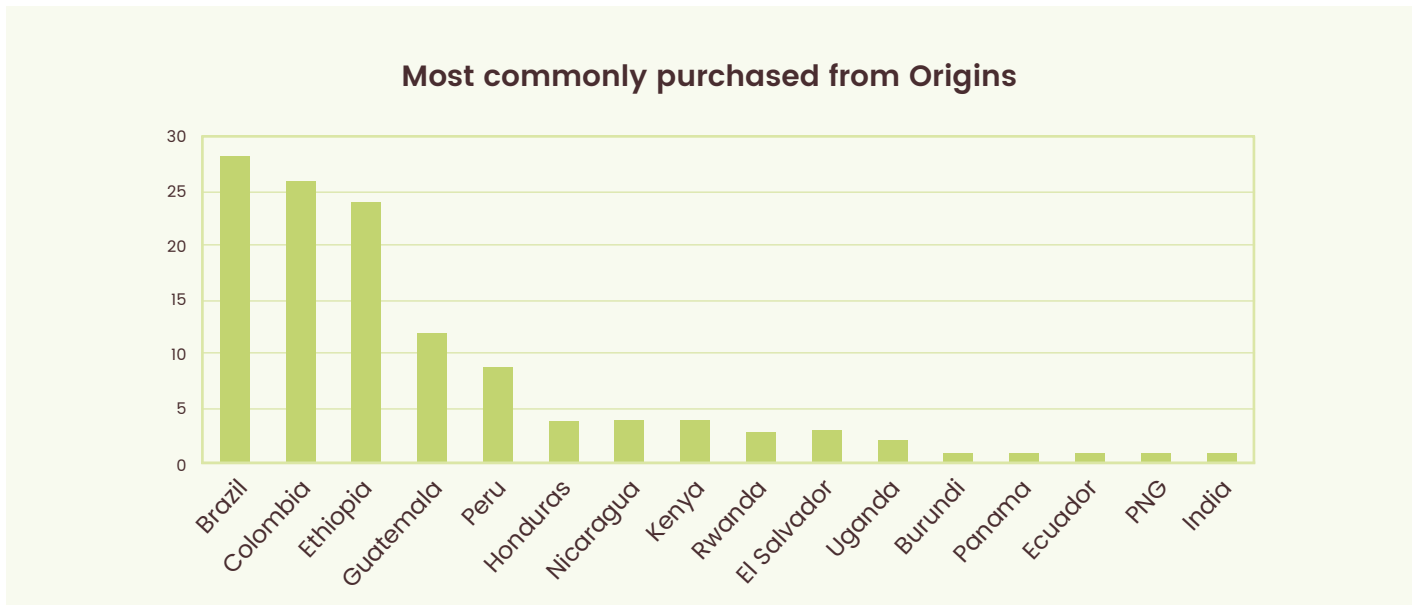
Below is the authors analysis of the survey results coupled with interview feedback. A further exploration of interview analysis is listed after the survey results. The author encourages the reader to explore the responses and data on their own to find additional insights. This analysis is an attempt to encapsulate as much of the survey is possible while also keeping the analysis relatively concise. If the reader has very little time please look for the 'Outcome(s)' sections as these give the authors final and more significant thoughts.

## Survey Results

What follows is a long form analysis of the results of the survey coupled with quotes and thoughts from the interview series.

### Purchase Preferences

The survey asked roasters which three coffee producing countries they purchased from most commonly.



In answering this question, the survey had 16 different countries listed. It is widely understood that there are between 25-30 coffee producing countries in the world. What this shows is that roasters are not buying homogenously from one or two countries, but often will specialize in large purchases from less 'mainstream' coffee producing countries.

Of the 42 responses received, 28 respondents reported Brazil, 26 reported Colombia and 24 reported Ethiopia as one of their main countries of origin for coffees purchased. This widely supports anecdotal data that the author has collected over the last ten years, that Brazil and Ethiopia make up a considerable amount of coffee used in European blended and single origin coffees.

The fourth and fifth most reported countries were Guatemala (with 12 respondents) and Peru (with 9 respondents).

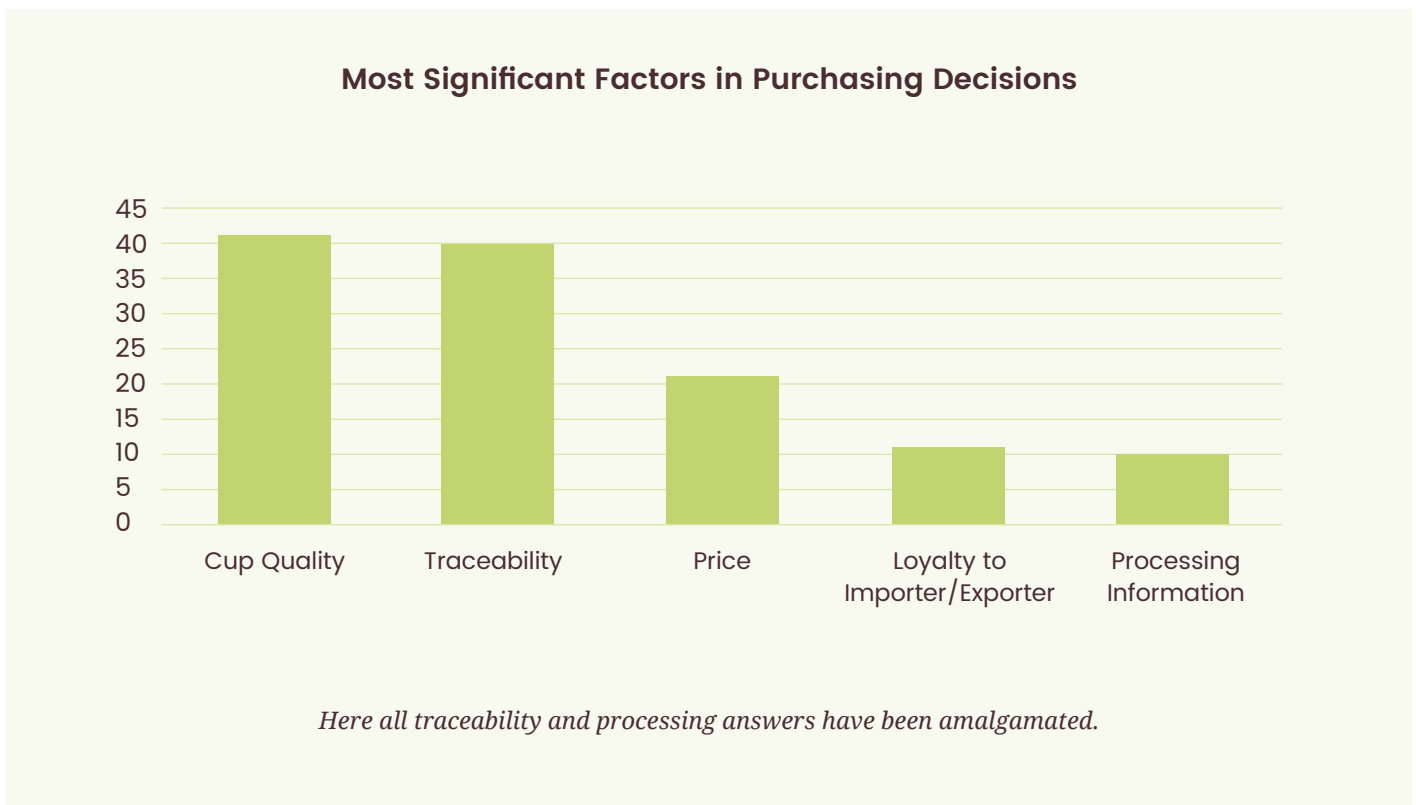
Of other countries mentioned four Central American countries (Nicaragua, El Salvador, Honduras and Panama) were mentioned by twelve respondents and four East African countries (Kenya, Rwanda, Uganda and Burundi) were mentioned by ten respondents. Of the remainder, India, Papua New Guinea and Ecuador were all mentioned once.

**Outcomes:** Brazil, Colombia and Ethiopia are the three most important supplier countries for the European coffee market.

## Purchasing Criteria

The survey further explored respondents' preferences with regards to certifications, processing methods and the selection process for coffee.

When asked to select the three most important criteria for making a coffee purchase, the overwhelming response was 'Cup Quality' (95%). This result has to be highlighted because it can help to shape our understanding of all the survey data. Consistent with the authors anecdotal experiences, in the specialty market place, almost every other consideration is subsumed by cup quality. It is a rare that a coffee which does not meet cup quality expectations will be purchased, regardless of the given coffees' rarity, associated story or any other projects the roaster may be involved in.



The second and third most selected criteria were 'Price' with 50% of respondents choosing this option and 'Traceability: Story and background to the coffee' with 42.9% of respondents choosing this option. The above chart, is adjusted for the total number of times a 'traceability' criteria was chosen. With this adjustment, we see that actually traceability broadly is more significant than price in roasters considerations about which coffees to purchase.

Of the criteria chosen by roasters, only 25% respondents did not choose traceability at all. Of the other 75%, all of these roasters chose one or more than one traceability criteria as important for their purchasing decisions. The topic of traceability is explored more in depth in the following section ('Traceability: The Story').

When we explore the answers from this perspective, we can see that it is possibly more accurate to say that roasters three most important criteria for purchasing are:



Cup quality



Traceability



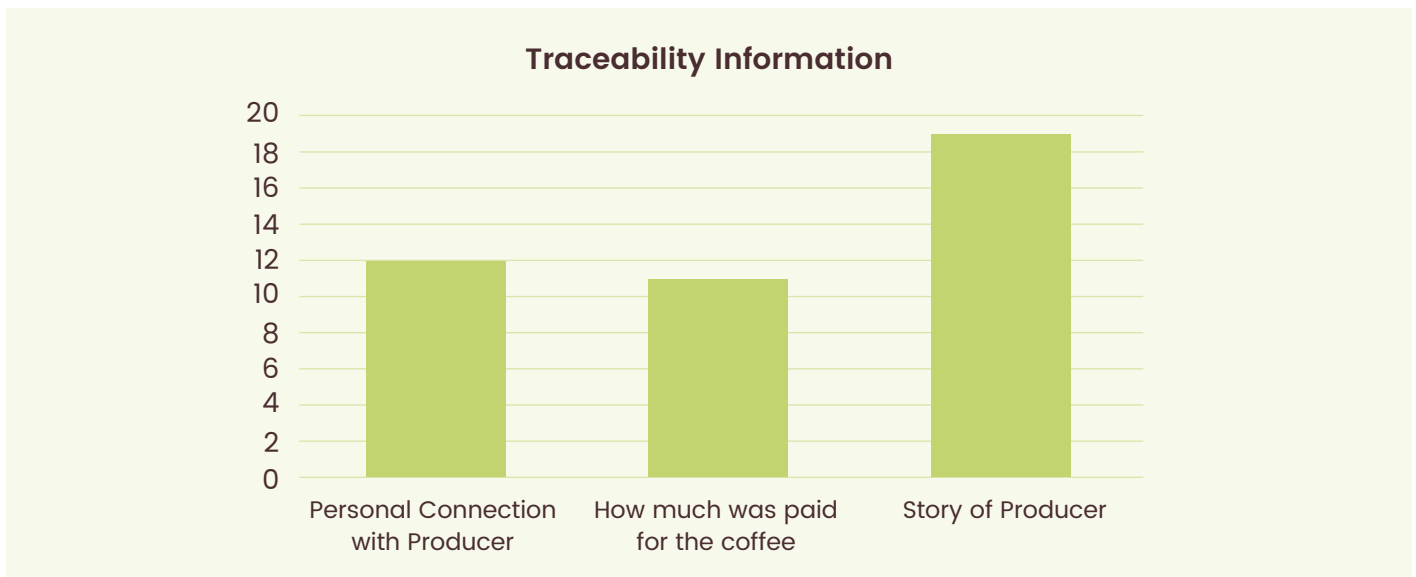
Price

It is notable that the fourth most commonly selected criteria was 'loyalty to a particular exporter/importer'. The topic of importer loyalty came up a lot in the interview series, with multiple interviewees responding that they start their search for new coffees by speaking to importers/exporters they already work with. What this suggests is that breaking into a roasters normal pattern of purchasing is important; and, once you have established trust with roaster then it is much easier to secure repeat business.

**Outcome:** Roasters purchase primarily based on cup quality with traceability and price as secondary but important considerations.

### Traceability: The Story

The author believes that the above data set suggests roasters are interested in varied forms of traceability. No one traceability criteria outshone any other in terms of selection. Some roasters, for instance, put more importance on the FOB or Farmgate price paid, whereas for others the story itself is considered of greatest significance.



In the authors interview with Davide Cobelli of Garage Coffee Bros, the idea of the importance of traceability information came up. Mr Cobelli states that:

*“In the end, we are the ambassador for the producers we work with. When we tell people about the producer, we name the coffee with their name, we provide all the information as possible with your customer – well the story is paramount. We are not just selling a seed, we are selling an emotion. An emotional experience. Of course this experience is in the cup, but it is also in the whole supply chain. I would like to include as much information as possible in the story of our coffee.”*

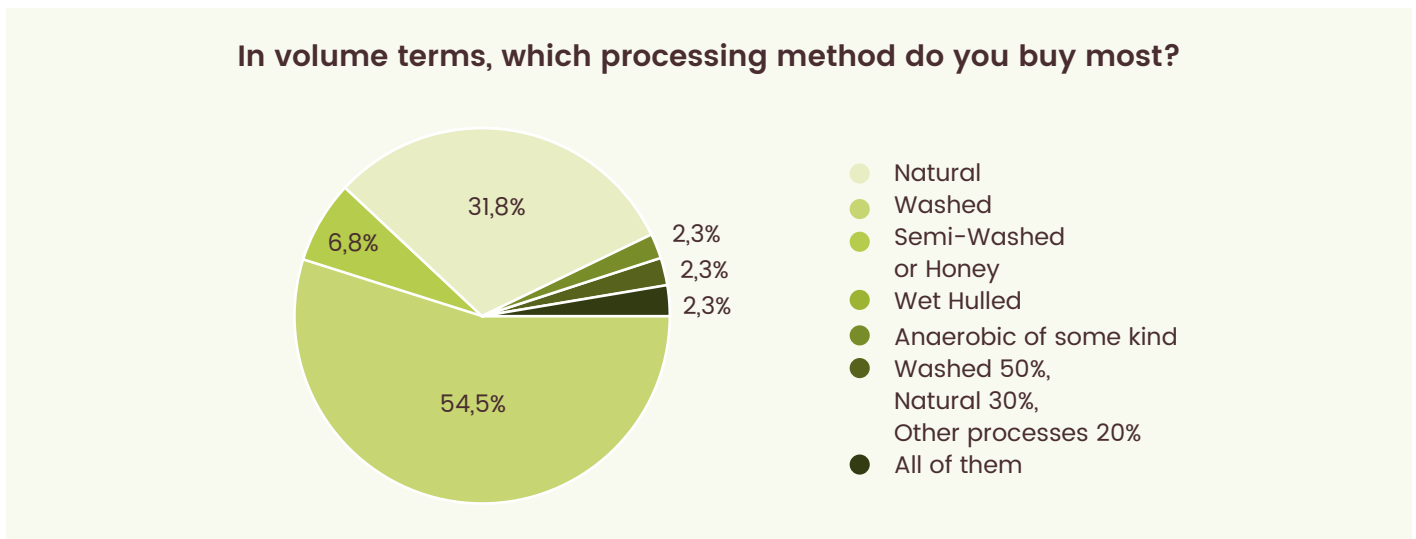


The survey failed to explore this topic in detail, but the question of how important the story of a coffee was a major focus of the interview series and this in turn revealed a lot of interesting insights. Almost every single interviewee felt the story of the coffee was important.

**Outcome:** The story of the coffee and human connection between roaster and producer are of significant importance to European roasters. Some roasters will demand more information with regards to pricing than others, but universally roasters consider traceability in their purchasing decisions.

## Processing

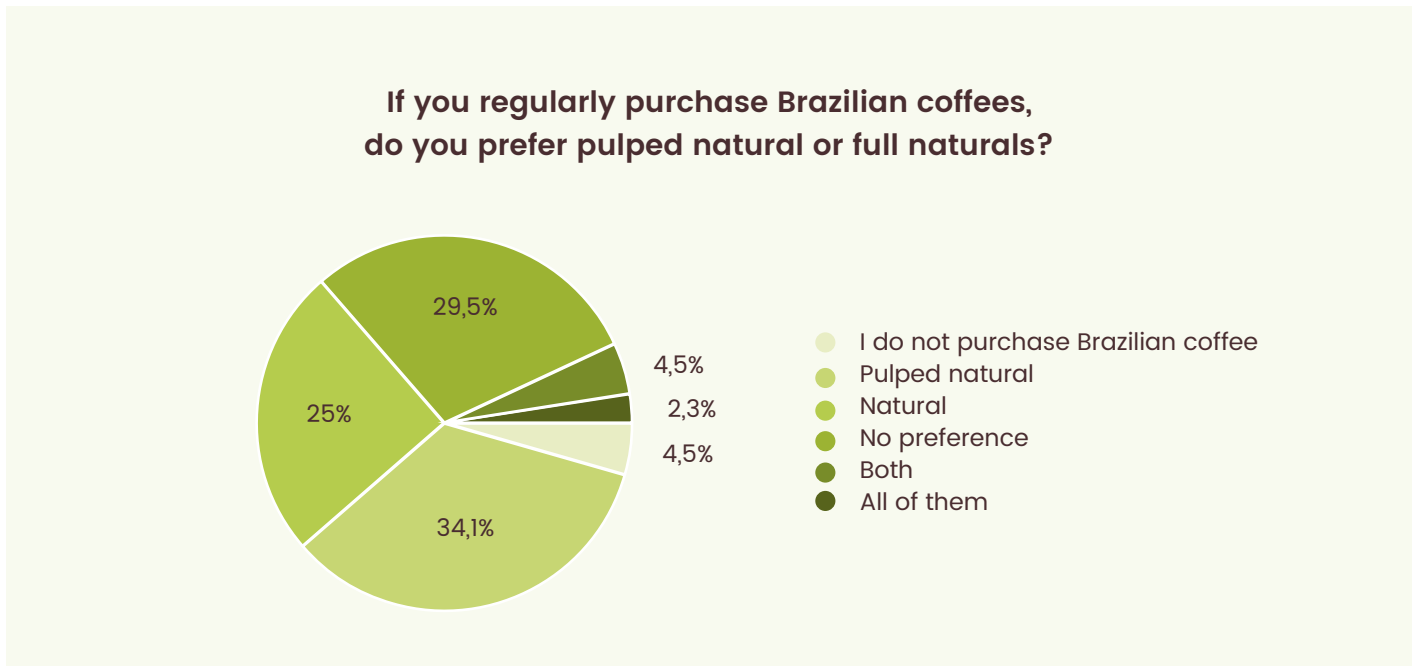
A direct question was posed to respondents about which processes they purchase most. Below it is shown that by far 'washed' process coffees remain the most typically purchased, however, 'naturals' and other processing methods take up around 45% of total purchases.



There is a disconnect between the chart shown above and that Brazil remains the most purchased origin (28 out of 43 respondents included Brazil in their top three purchasing origins). Brazil produces almost entirely natural and pulped natural process coffees; yet, over 50% of respondents reported that the majority of their coffees purchased were washed. What this likely tells us is that other than Brazilian coffees, almost all coffees purchased in volume are washed coffees. This outcome is significant, because while the industry appears to be shining a spotlight on non-washed coffees (naturals, anaerobics, etc), the majority of coffee purchased remains washed coffee.

Interestingly, one respondent put down their break down of coffee processes (“Washed 50%, Natural 30% and Other 20%”). This breakdown corresponds almost exactly with the percentages shown in the pie chart above. The author notes this, because it is possible that the pie chart relatively accurately a typical breakdown of purchasing at most roasteries.

## Brazilian Coffee Preferences



With regards to the above question about purchasing preferences of Brazilian coffees, we see that there is a slight preference for Pulped Natural (33.3% of respondents) but with minor corrections based on the responses given, we can see that over 1/3rd of respondents had no preference for Natural or Pulped Natural.

**Outcome:** Based on the results of the survey, there is no single preferred processing method with regards to Brazilian coffees and instead that producers should focus on overall improving cup quality regardless of method.

*More insights into customers processing preferences can be found in the Trends analysis segment.*

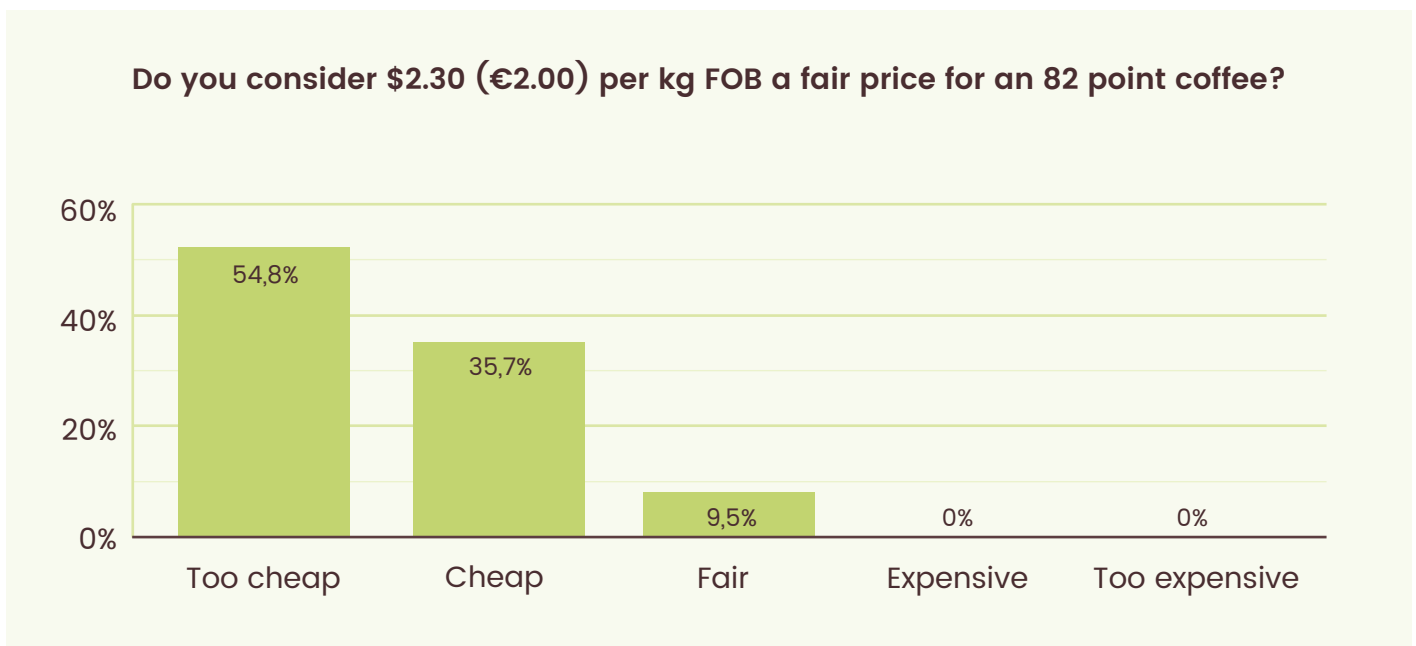
## Pricing Preferences

The below section explores pricing trends and how roasters believe prices should correspond with cup quality.

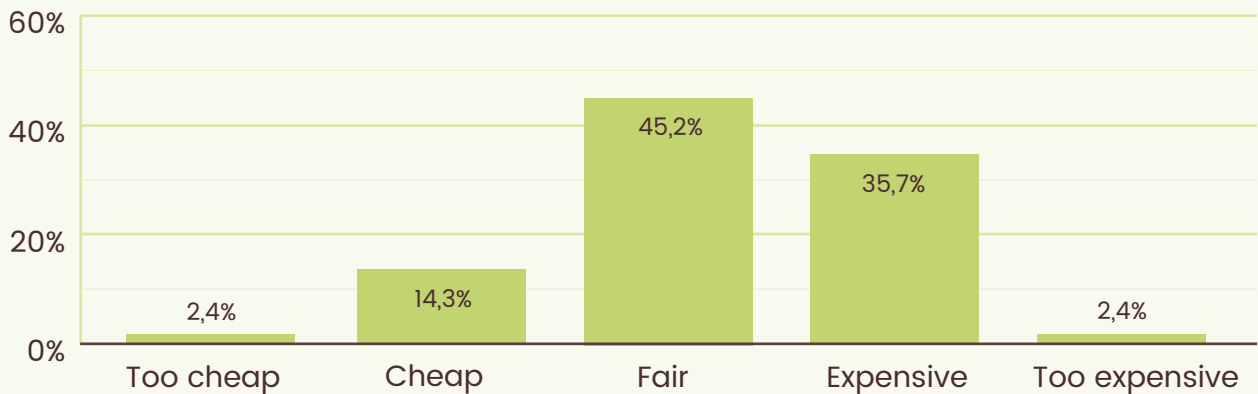
To ascertain the pricing tiers used in the survey, the author first explored the 2019 Transaction Guide Revised. In this Guide we see that the lowest price paid for a large contract of 80.0 – 81.9 point scoring coffee was \$1.15 per lb in 2018/2019. This was used as the absolute lowest price considered possible for a 82 point scoring coffee. Then the second price point was established by looking at the median price for a 82 point coffee in a small contract (1,001 to 3,000 pounds in weight); this was \$2.40 per lb. Finally, the highest price point of \$3.25 per lb was taken from the small contract size (under 1,000 pounds in weight) with the highest price for that given quality. The same approach was then applied to find the approximate lowest price, median price and high price point for an 84 point coffee.

The author focused exclusively on the pricing on 82 and 84 point scoring coffee because these are often the coffees that are hardest to price. Instead of exploring the pricing for higher scoring coffees, another question was asked about the top price the respondents would be willing to pay for coffee, regardless of quality.

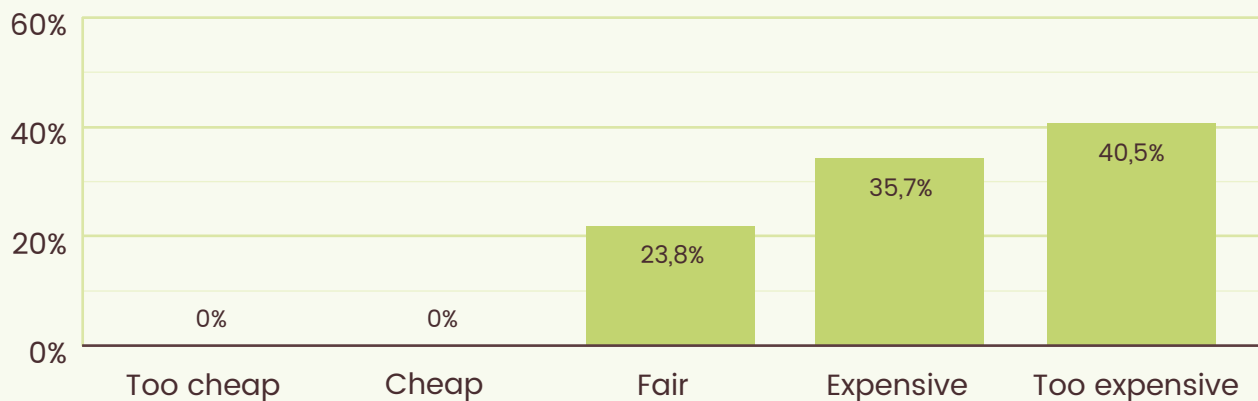
### 82 point pricing



### Do you consider \$5.30 (€4.50) per kg FOB a fair price for an 82 point coffee?



### Do you consider \$7.00 (€5.90) per kg FOB a fair price for an 82 point coffee?



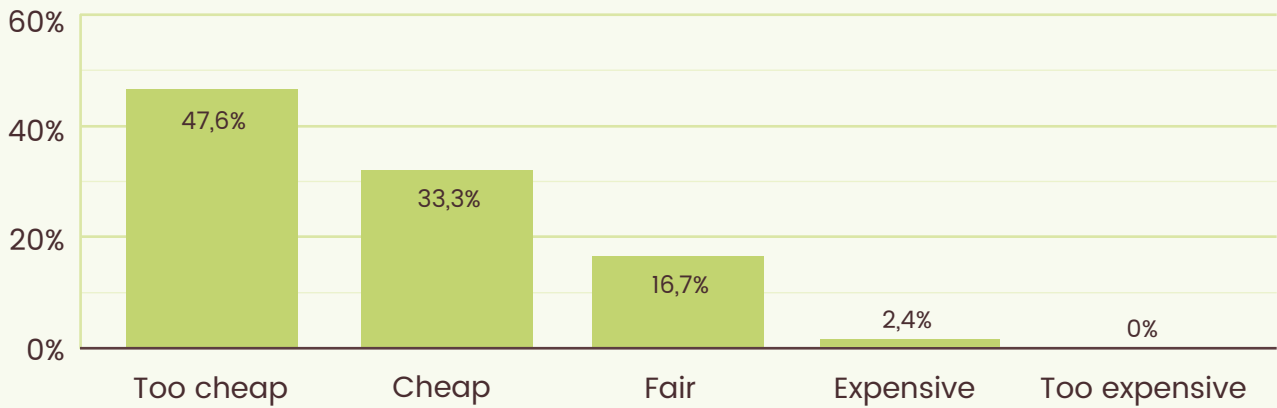
In Chart A, only 9.5% of respondents believed that \$2.30 per kg was at an acceptable price for a 82 point coffee; the remainder all stated that this price was too low. The majority stated that such a price was far too cheap (54.8%). Unsurprisingly, the second price point of \$5.30 per kg shown in Chart B, drew a much broader stretch of responses. Overall, the majority felt this price was fair (45.2%) or somewhat expensive (35.7%). When we explore responses to the highest price point found by the Transaction Guide in Chart C, we received responses that universally pointed to the price of \$7.00 per kg being too expensive (23.8% considered this price fair, 35.7% considered it expensive and 40.5% considered it very expensive).

#### What does this data reveal?

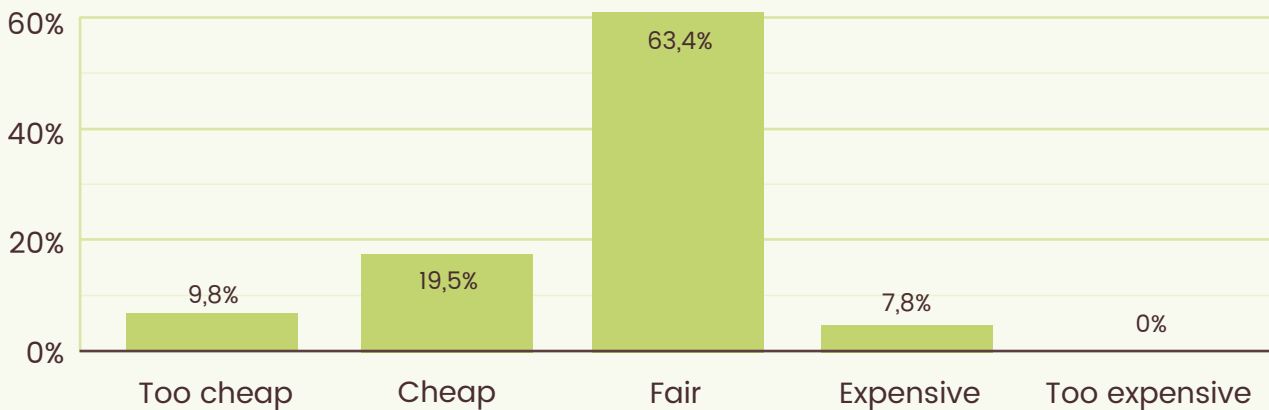
- Firstly, that at one end of the industry there are buyers who do not think it is unfair to purchase specialty graded coffee for as little as \$2.30 per kg.
- Secondly, the vast majority of coffee roasters would expect a price somewhere between \$2.30 – \$5.30 per kg for an 82 point coffee. It is likely that the most acceptable price point would be around \$4.00 – 5.00 per kg.
- Finally, that there are instances when a roaster would be willing to pay up to \$7.00 per kg for an 82 point coffee. Unfortunately, the survey fails to capture under exactly what circumstances the roaster would find such a price to quality ratio acceptable.

## 84 point coffee

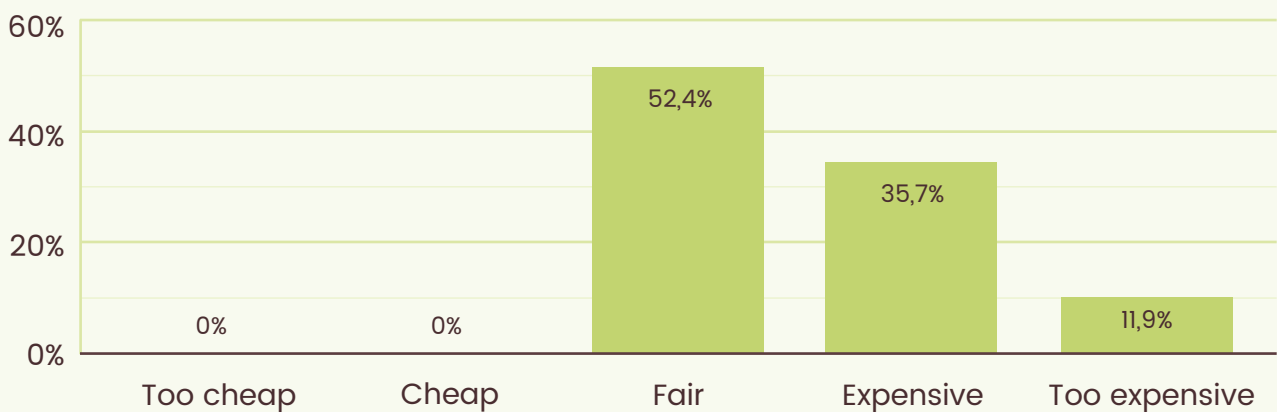
Do you consider \$3.80 (€3.20) per kg FOB a fair price for an 84 point coffee?



Do you consider \$5.80 (€4.90) per kg FOB a fair price for an 84 point coffee?



Do you consider \$7.50 (€6.30) per kg FOB a fair price for an 84 point coffee?





We see again a similar trajectory of responses in the responses for the 84 point coffees as we did for the 82 point scoring coffees. However, the prices for 84 point coffees found via the above methodology with the Transaction Guide, lead to less extreme pricing distribution. With a less broad range of price points, there were less divisive responses given by respondents. The lowest price point mentioned in Chart D (\$3.80) was considered cheap or too cheap by 80% of respondents. However, one respondent considered it slightly expensive. Then around 63% of respondents considered \$5.80 per kg (listed in Chart E) a fair price, but a strong minority of 20% considered this price cheap or too cheap. The price of \$7.50 per kg (listed in Chart F) was considered expensive by around 47% of respondents but the majority still considered this price fair (52.4%).

This data suggests that:

- A price point of between \$5.80 - \$7.50 per kg is considered the fairest pricing for an 84 point coffee. With the author suggesting a price closer to \$6.00 per kg than \$7.00 per kg being the most acceptable.
- The outcome of this pricing inquiry suggests that an 84 point coffee is easier to market at a high price than an 82 point coffee. With cup quality being of paramount importance to roasters, an 84 point coffee is significantly more desirable than an 82 point coffee and therefore allows for more conditions where a high price can be accepted.

## Quality and Price Maximums

The survey went on to explore what is the limit that roasters will pay for coffee, regardless of quality. Price points were broken down starting at as low as \$8.00 per kg (green) and going as high as \$200.00 per kg with a further option stating 'there is no limit on what I will pay for coffee.'

28 of the 42 respondents choose a price point of \$25.00 per kg or lower as the maximum they would pay for green coffee. The median price point chosen was \$22.50 per kg and the mode was \$20.00 per kg. The range was \$12.00 per kg to 'there is no limit...'

What these results show us is that:

- Pricing below \$12.00 per kg is universally considered reasonable for specialty coffee.
- While pricing for rare and competition coffees continues to climb year on year, only one third of European roasters would spend more than \$25.00 per kg on a coffee, regardless of quality or rarity.

We also asked survey respondents to expand upon the reason for their choice with a short-written answer. Multiple answers commented on the 'rarity' or 'uniqueness' of the coffee, suggesting that quality and price point seem divorced at these higher prices and marketability trumps cup quality when coffees reach these extremely high price points.

Furthermore, many roaster respondents stated that there is not the marketplace for high priced coffees, or in other words, that their customers would not accept such high prices. This attitude is well summed up by one respondent who states: "Certain brands would be able to market a coffee above this price and be able to make a margin to make it worthwhile. Most others would struggle selling a coffee above this price."

### Outcomes:

Specialty coffee can be priced up to \$12.00 per kg before any additional special marketing considerations have to be made. Beyond this point the audience for any given coffee will begin to decrease rapidly. Beyond a price point of \$25.00 per kg, producers should consider what 'special features' the coffee possesses: status as a competition winning coffee, an exceedingly rare varietal, a nanolot, an exciting story behind the coffee and so forth.

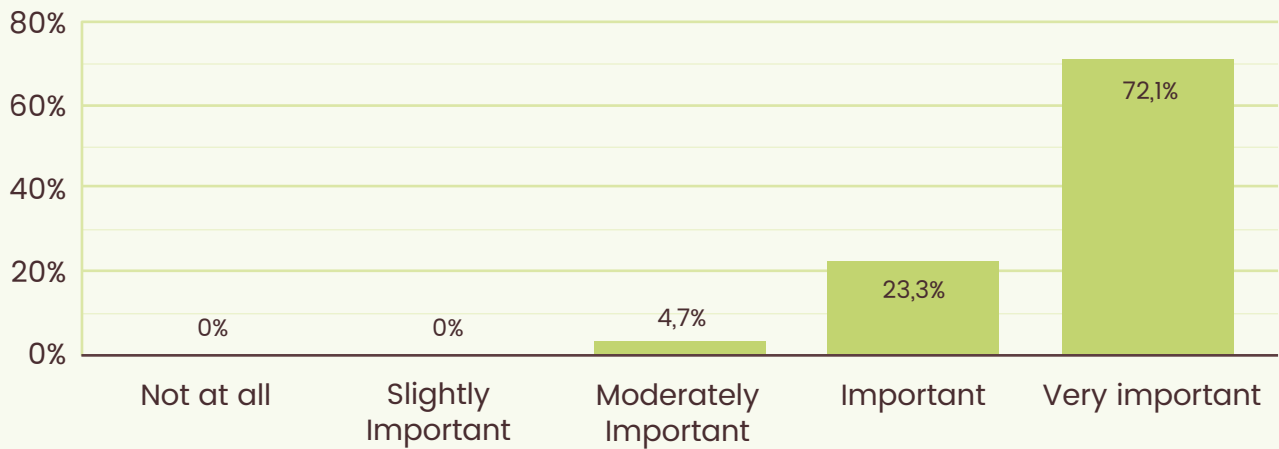
References:

<https://www.transactionguide.coffee/en/2019>

### Pricing and payment to farmers

An important element in pricing is how important roasters believe it is that producers are well paid for their work. It is almost impossible to ascertain at what price point a farmer is 'well paid' due to different costs of living, the value of different currencies and also what is considered a good standard of living in any given producing country. For this reason, we did not specify ask about 'fair' price points or go into details and left the question vague and open ended.

### How important for you is it that producers are well paid for their work?



The results of this questions showed that every single roaster considered is at least somewhat important that farmers were well paid, with the majority stating that it was very important (72.1%).

### How much certainty do you have that producers you work with are well paid?



However, when asked how certain respondents are that the producers, they work with are well paid the responses were much more varied. The majority showed at least some degree of certainty, but only 23.3% of respondents were very certain and one respondent was honest enough to say that they had no certainty at all. Here we see a large different between what roasters hope and expect about traceability and transparency and what the realities of the coffee trade are.

Again, respondents were asked to expand upon their answer by explaining how they assured themselves that they were purchasing coffees at a fair price. Many of these responses stated how the respondent leaned on their importing partners, that they relied on trust and the importer having a 'good reputation' in order to assure themselves that fair prices were being paid. Several answers spoke about using FOB and Farmgate prices and again others talked about using direct trade channels.

This comment was especially positive about Algrano: "Trading with Algrano allows us the comfort of knowing what the producer is paid and that they get a fair price for their hard work."

**Outcome:**

Roasters consider it very important that their producer partners are paid fairly but overall do not have full confidence that this is taking place.

## Connecting with Origin

A key point of Algrano's business platform is to connect roasters with producers. For the majority of the history of the coffee market, direct connection between roasters and producers has been impossible. In recent years a limited amount of connection between roasters and producers has been created, though largely through importers. As the industry shifts towards more direct connection, more traceability and more transparency, it is important to gauge how, and even if, roasters want to connect with farmers.

The first question asked about this topic in the survey, was if/how the respondent had connected with producers in the past. It was the authors expectation that a considerable number of respondents would have not yet had direct contact with a producer. This expectation was completely wrong. Every single respondent has met with a producer, either digitally (69%), at a trade show (57%) or in the producers' home country (64%). Furthermore, when asked if the respondents would like producers to reach out to them directly, 52.4% said yes and 42.9% said maybe. In a later question in the survey, it was asked how many respondents cancelled a trip to a producing country in 2020 and a full 64% of respondents had planned to or made trips in 2020. It is clear from these responses that direct connection between farmers and roasters has moved from being a desirable condition for most roasters, to being the new normal. No longer are farmers and producers 'fenced off' by import and export structures but roasters are already beginning to speak directly with producers and are broadly interested in building these direct connections.

### How to connect

The survey asked directly about the best methods for a producer to reach out to the roaster respondent. Email was by and large the preference for most individuals with two thirds choosing this as their preferred method of communication and 24% considering it good in some instances.

Of the other options, if we combine respondents who chose the 'good in some instances' and 'personal preference' answers, the list of preferred methods of contact can be listed as below:

1. Email
2. Whatsapp
3. Instagram
4. Phone Calls\*
5. Facebook
6. Twitter

\*Caveats must be made for phone calls, where only a very small number of respondents chose this as their preferred method of communication but half of respondents believed that phone calls were 'good in some instances'.

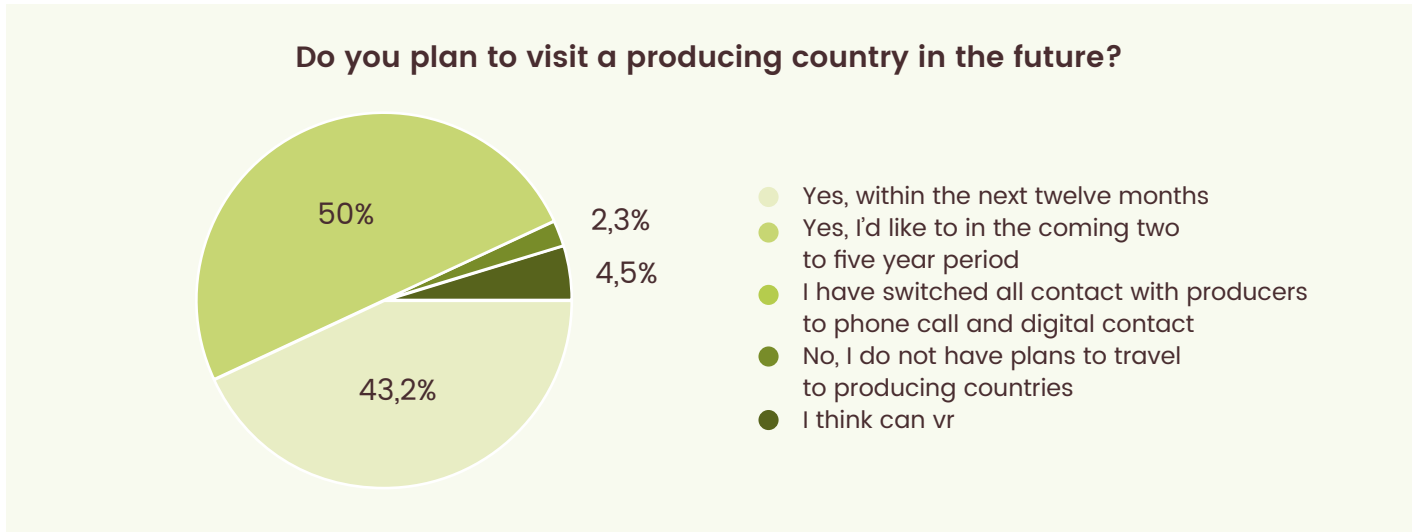
### Outcome:

Email is the best way to make an initial contact with roasters and Instagram the best social media outlet for producers to invest their time and energy into.



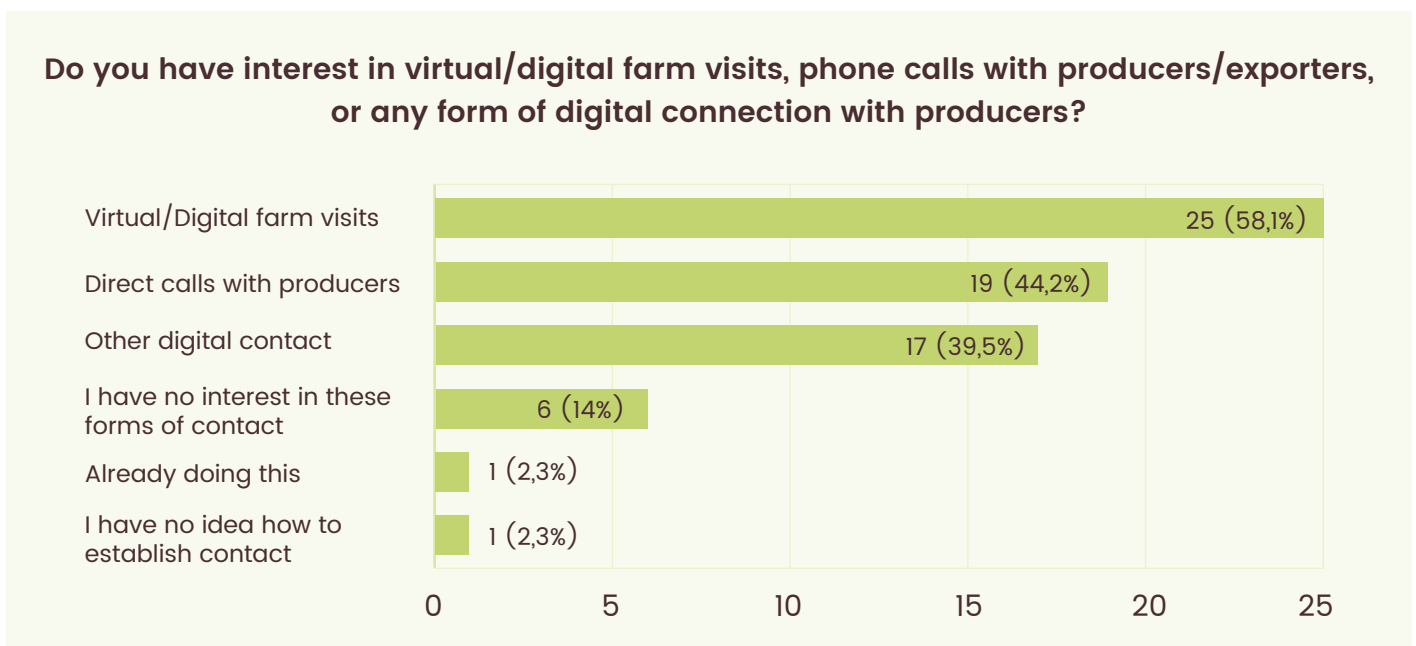
## Visiting Origin

One respondent to the previous question noted that their preferred form of contact with producers is to meet with them in person. We see from the survey's question on origin travel, that there is still very strong demand to meet producers in person regardless of COVID-19:



Not one respondent stated that they had switched all contact to online methods. In fact, this question shows that 95% of roasters would like to visit a producing country in the coming year to five year period. This question is incredibly important because it points to COVID's impact on sourcing relationships being much more short term than long term. This author believes that when a vaccine is fully implemented, roasters by and large will begin travelling to producing countries and meeting with farmers.

However, this result does not negate the importance of digital contact. In the following question we asked if respondents were interested in digital methods of communication:



Only 14% of respondents stated that they were not interested in digital forms of communication. Overall, the most popular idea suggested was 'Virtual/Digital farm visits'. The author believes that due to the pandemic, roasters are more open minded to digital connections with producers but will also plan direct, in person, contact in the future.

#### **Outcomes:**

Roasters are very keen to travel to visit producers when it is possible. However, the COVID process has normalized digital forms of contact between roasters and producers. With this in mind, producers may want to consider hosting 'digital farm visits' as a way to engage with roasters until travel can be resumed and even after.

#### **What is important to respondents in communicating with producers**

Eleven respondents left written responses to what they hope to learn from communications with producers. It is worthwhile to note that these common themes came up:

- Respondents seemed focused on the opinions, hopes and needs of farmers. The use of the possessive pronoun "their" was quite interesting, suggesting that respondents really want to know and understand farmers better.
- Multiple answers focused on the idea of 'building relationship' and that there remains a strong desire from roasters to have personal contact with farmers. One respondent made it so clear as to say: "If I feel a connection with them [the producers] and [I will] therefore want to work on a relationship and purchase their coffee."
- Two respondents mentioned how the farmers treat their workers. This issue of farm worker conditions and pay is a rising issue in the industry and it is significant to see respondents mentioning this issue; the author believes this will continue to grow in importance as a topic for the industry.

## Trends for the Coming Year

### Areas of Growth and Decline

We surveyed respondents to see where their businesses were growing and where they had seen declines over the last twelve months.

Areas of Growth identified by respondents can be listed in this order:

1. E Commerce (71.4%)
2. Retail Sales: In Person/In Store (35.7%)
3. Wholesale/B2B Sales (28.6%)
4. Subscription Sales (23.8%)
5. Grocery Store (7.1%)
6. Capsules/Pods (7.1%)

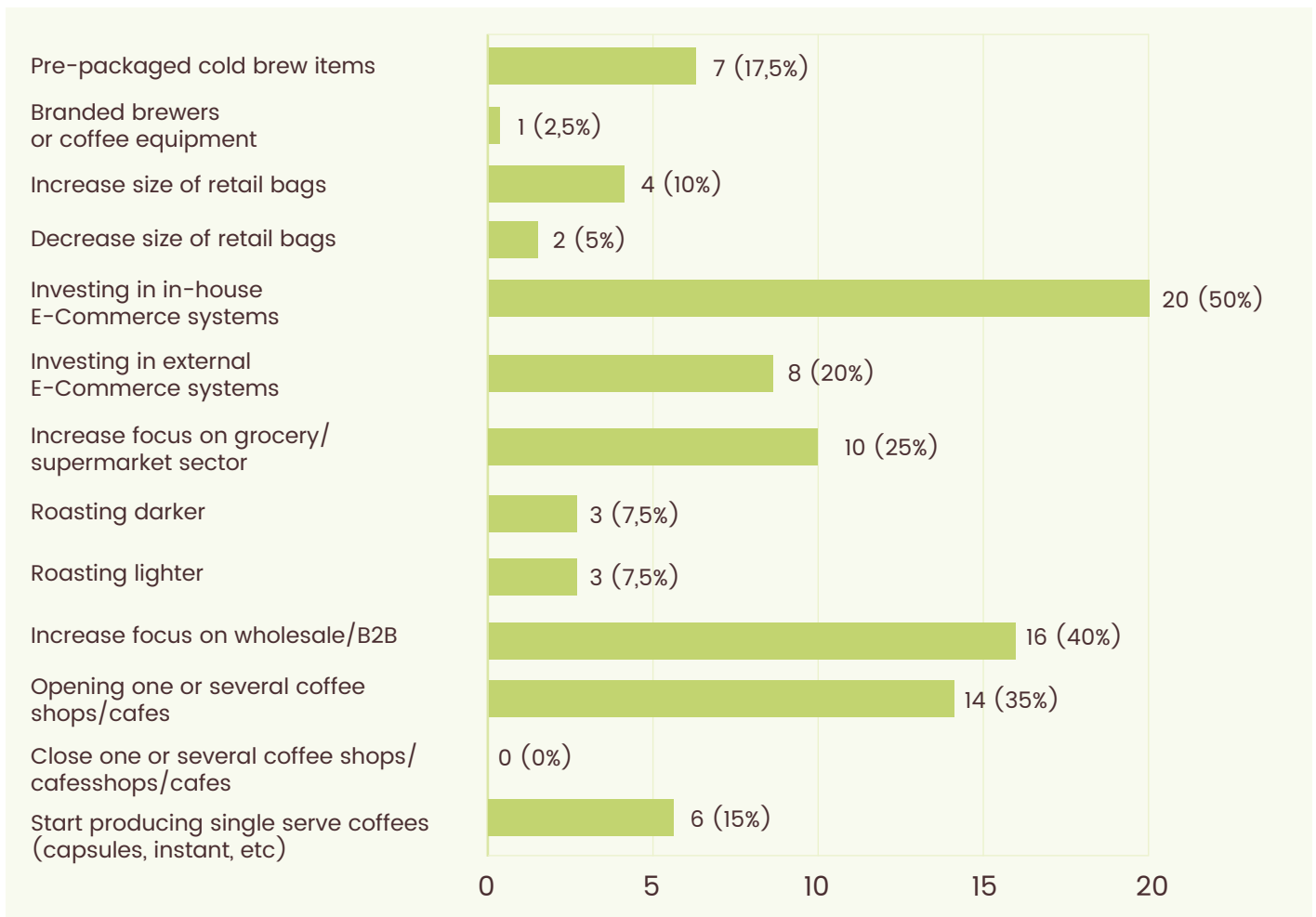
Areas of decline identified by respondents can be listed in this order:

1. Wholesale/B2B Sales (62.2%)
2. Machinery and Equipment Sales (16.2%)
3. Grocery Store (5.4%)
4. Retail Sales: In Person/In Store (5.4%)
5. Subscription Sales (5.4%)
6. Capsules/Pods (2.7%)

The author had expected to see large growths in E-Commerce sales for most respondents and large declines of B2B sales. However, it is noteworthy that 28.6% of respondents saw not declines but growth in their wholesale (B2B) sales. What was also surprising is that trends towards more specialty/craft roasters moving into capsules/pods seems not to be as large a trend as assumed. The growth of 'In Store' purchases does point towards a trend toward buying locally produced products, a topic that came up in several of the interviews conducted also.

**Outcome:** E-Commerce and in store sales are driving roasters businesses during the COVID-19 period. Business to business and equipment sales have suffered considerably during the last 12 months.

## Where are roasters investing?



Above is a chart of responses about where roasters are planning to invest in the coming year. The most common response (50.0%) was that roasters will be investing in internal E-Commerce systems (i.e. roasters own webshop). A further 20.5% stated that they will be investing in external E-Commerce systems (i.e. CoffeeDesk, Gustastory, Amazon, etc). These responses point clearly to the growth trend of online coffee sales.

However, the above chart also shows that traditional areas of growth for roasters continue to remain focal points for roasters. For instance, respondents point to: increasing focus on wholesale and B2B sales (38.5%) and opening new retail/café spaces (35.9%). The author also notes that in the interview series, some interviewees noted many new cafes opening even during the last twelve month period. For instance:

*“The only surprise for me [this year], is that there are many new cafes opening up. Mostly small shops, not too large, but a lot of them.”* – Adrian Simion, Guido Coffee

*“I still think there is an oversaturation of cafes. But when you watch consumers you see that they walk down one street and not the next; so [the market can sustain] many more coffee shops than you realise. People drink a lot of coffee these days!”* – Phil Wain, Caffeine Magazine

### **Capsule/Single serve trends**

Single serve coffee is growing in demand every year. In fact, the European coffee pods and capsules market is expected to grow at an average annual rate of 6.8% between 2020 and 2025. Increasingly we see specialty roasters and smaller roasting operations of all types, selling single serve coffees. As the excess to the technology required to make capsules and other single serve coffees is becoming increasingly accessible, this trend will only continue.

The CBI indicates that in 2018, France (32%), the Netherlands (31%) and Belgium (27%), were the three strongest markets for coffee pods and capsules.

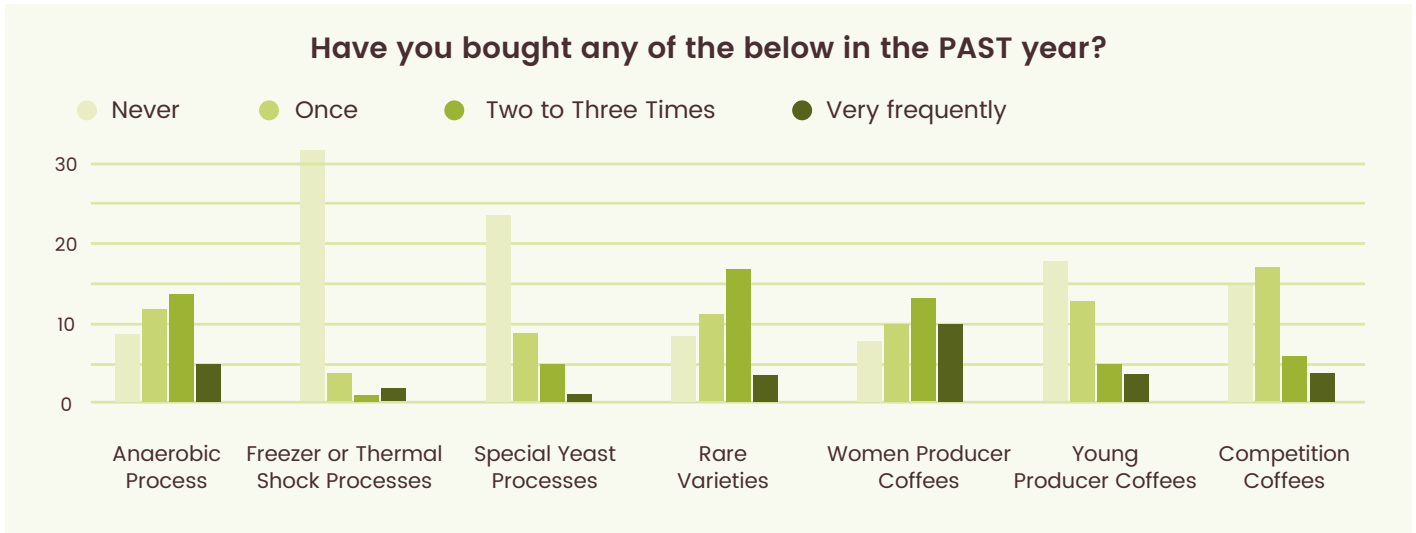
As a producer the importance of the capsule market is that the usage of coffee in any given coffee is very low: with on average most capsule containing 5-9g of coffee. This, in turn, means that roasters can make much increased margins on these products and, therefore, are able to purchase more expensive coffees to use in single serve products than they normally would be able to.

The survey points to only a small number of specialty roasters entering the capsule market sector (15%) and this only being an area of growth for 7.1% of respondents. What this may suggest is that the 'specialty' capsules sector is still relatively small and that this area will likely grow in the years ahead. What is currently happening is the trend for capsules, regardless of quality, is growing. The author believes that we may see a considerably higher number of roasters investing in capsule/single serve technologies in the coming years but this trend has yet to enter any level of normalcy among specialty roasters.



## Purchasing Trends

In the 'How you buy coffee and what you buy?' section of the survey there was a question asked about purchasing trends and how they might change with regard to coffee types. We notice some interesting trends here which will be handled on a case-by-case basis below.



### Anaerobic Process

Anaerobic processed coffees can be defined as coffees produced that undergo a fermentation stage without any exposure to oxygen through the use of bags, tanks or other means. This type of processing has become increasingly popular after its appearance in barista competitor routines over the past five years. While these coffees are still relatively rare, our survey showed that around 75–78% of roasters had purchased at least one of these coffees. Furthermore, a similar number of respondents (around 74%) reported a desire to purchase these coffees again with approximately 1/3 stating that they would like to use anaerobic processed coffees as part of their regular offerings.

**Outcome:** The trend for anaerobic processing is not fading and will likely continue to grow. The author predicts that the desire for higher consumption of these coffees will further normalize their production by coffee growers and reduce the prices/price expectations of these coffees.

### **Freezer or Thermal Shock Processes**

This type of processing has come to the attention of roasters over the last twelve months. While the author has seen experimentation with controlled temperatures of coffee fermentation at the farm level for two or three years, their presence in the European market place appears to be relatively recent. These coffees can be defined as coffee where the use of refrigeration or other mechanisms is employed to reduce the temperature of fermentation and as such extend the fermentation period of the coffee. The vast majority of respondents had not tried these coffees, but 28 of 38 respondents expressed an interesting in buying these coffees.

**Outcome:** The author believes this result points more to the fact that roasters are keen to try new, novel processing methods than the 'Freezer' method in particular. Roasters are still curious to try new processes and as such the production of small test runs of interesting processing methods may be successful in the European marketplace.

### **Special Yeast Processes**

Special yeast processes can be defined as coffee produced with the use of yeast inoculation or the introduction of foreign yeast to the fermentation of the coffee. The results here mirror those of the 'Freezer or Thermal Shock' coffee, but are overall less extreme. With more roasters having tried these coffees but the majority still having not purchased any coffee processed in this way. The author believes the outcome here is much the same as with the above outcome: that roasters are curious about new processing methods and are willing to try these coffees.

### **Rare Varieties**

This question in the survey was relatively vague, some roasters may consider Pink Bourbon to be a common variety or a special, more rare variety. However, in the survey examples of 'rare' varieties were listed as 'Pink Bourbon, Gesha and Wush Wush.' In response to this question, over 78% of respondents reported having purchased these coffees in the past. More significantly, 53% percent of respondents said they would like variety specific coffees to become part of their regular offerings.

**Outcome:** There seems to be a clear demand for variety specific coffees. This should be a sign to coffee producers that their existing and future efforts to invest in new coffee trees and varieties will likely be rewarded by the marketplace.

### **Women Producer Coffees**

Women Producer coffees can be defined as coffee marketed as being produced by a female coffee producers – this may refer to a co-operative run and managed exclusively by and for women, it may also refer to individual coffee farmers who identify as female. There was a large mix of responses to roasters existing consumption of these coffees, with around 25% of respondents stating that they already have these coffees as a significant part of their offering, and almost 80% stating that they had tried these coffees already. Around 58% percent of respondents stated that they would like to have these coffees in their regular offerings in the next year.

**Outcome:** As with the Rare Varieties answer, it appears that there is a strong trend towards Women Producer coffees. This coffee type seems to be transitioning from a trend to a norm. As such, this may become less of a 'special coffee' for many roasters but the demand for these coffees will continue over time.

### Young Producer Coffees

Once again, the survey leaves the definition of 'Young Producer' vague. However, with the average age of coffee farmers across Africa being 60 and in Colombia 56, even an age of 40 years old could be considered young. This author would suggest that Young Producer would typically be understood to be producers to individuals under the age of 31. Of the respondents 22 of the 40 have purchased coffee in this category, but the remainder, 18 respondents, make up a large percentage of roasters yet to try these coffees. Of the respondents, 75% stated that they would like to try these coffees or make them part of their regular range in the coming year.

African Farmers Age - <http://www.ico.org/documents/cy2014-15/icc-114-5-r1e-overview-coffee-sector-africa.pdf>

Colombian Farmers Age - <https://scanews.coffee/2015/08/04/farmer-profitability-managing-risk-in-the-supply-chain/>

### Competition Coffees

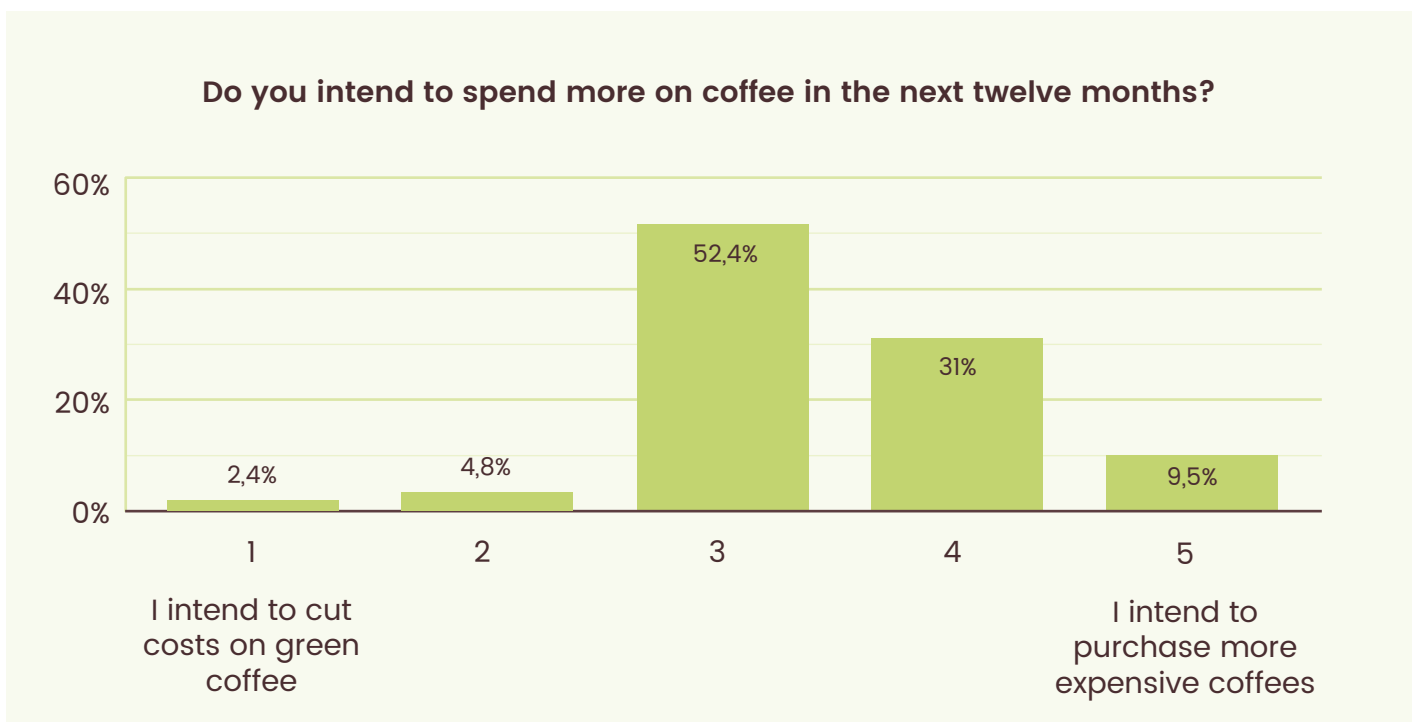
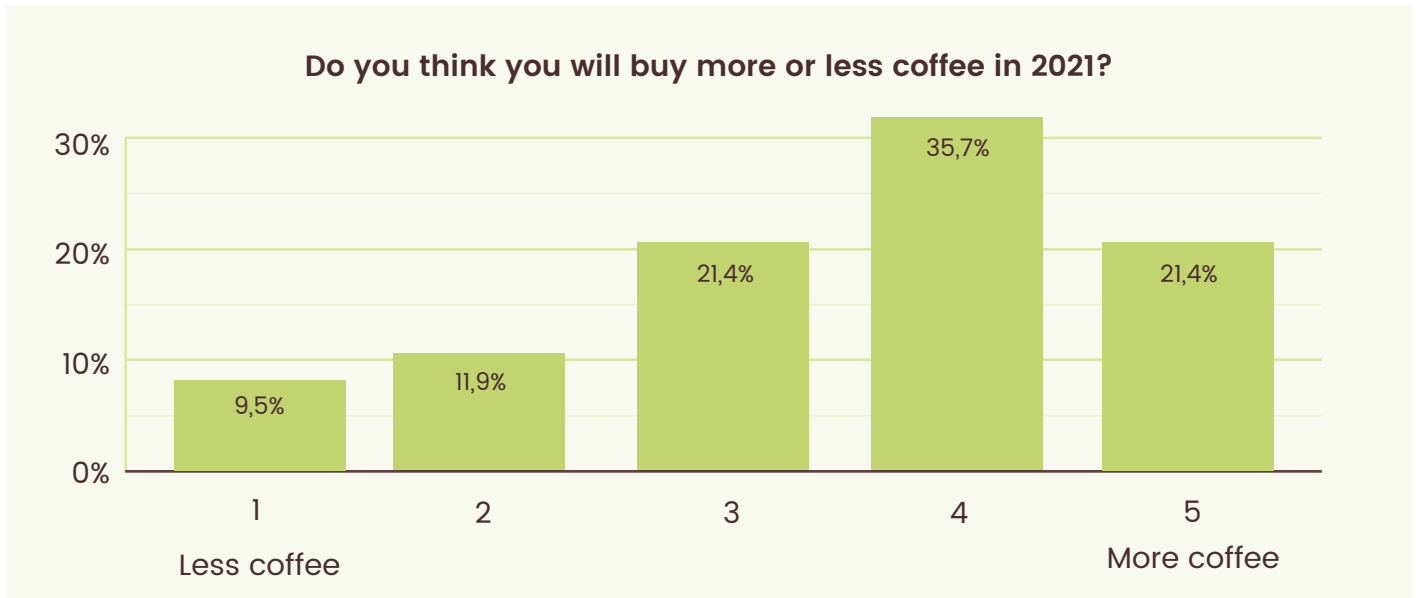
Over half of respondents reported having purchased Competition Coffees in the past. We notice that unlike in the cases of Rare Variety or Women Producer categories, an initial exposure to Competition Coffees does not correlate with a growing demand to make these coffees part of the roasters regular range. Instead, roasters report a strong interest (45%) to try these coffees once in the coming year but not more than that. This may be because of the high pricing of these coffees.

**Outcome:** While competition coffees are becoming more normalized and roasters are expressing strong interests to keep trying these coffees, it does not seem likely that these coffees will become part of many roasters' regular offerings.

**Overall Outcomes:** The areas of greatest potential for coffee producers, based on this survey, were rare varieties and lots separated out as produced exclusively by female farmers. Secondly, anaerobic processes and young producer separated lots also seem to be growing trends for roasters. There is also clear indication that roasters are still interested in trying new processing methods and exploring new coffee profiles. However, all of this data must be understood within the context of the early finding of the survey – that cup quality is significant in all purchases. If a coffee is considered rare or produced by a specific group of producers, that does not mean this element of marketability will necessarily trump considerations of cup quality.

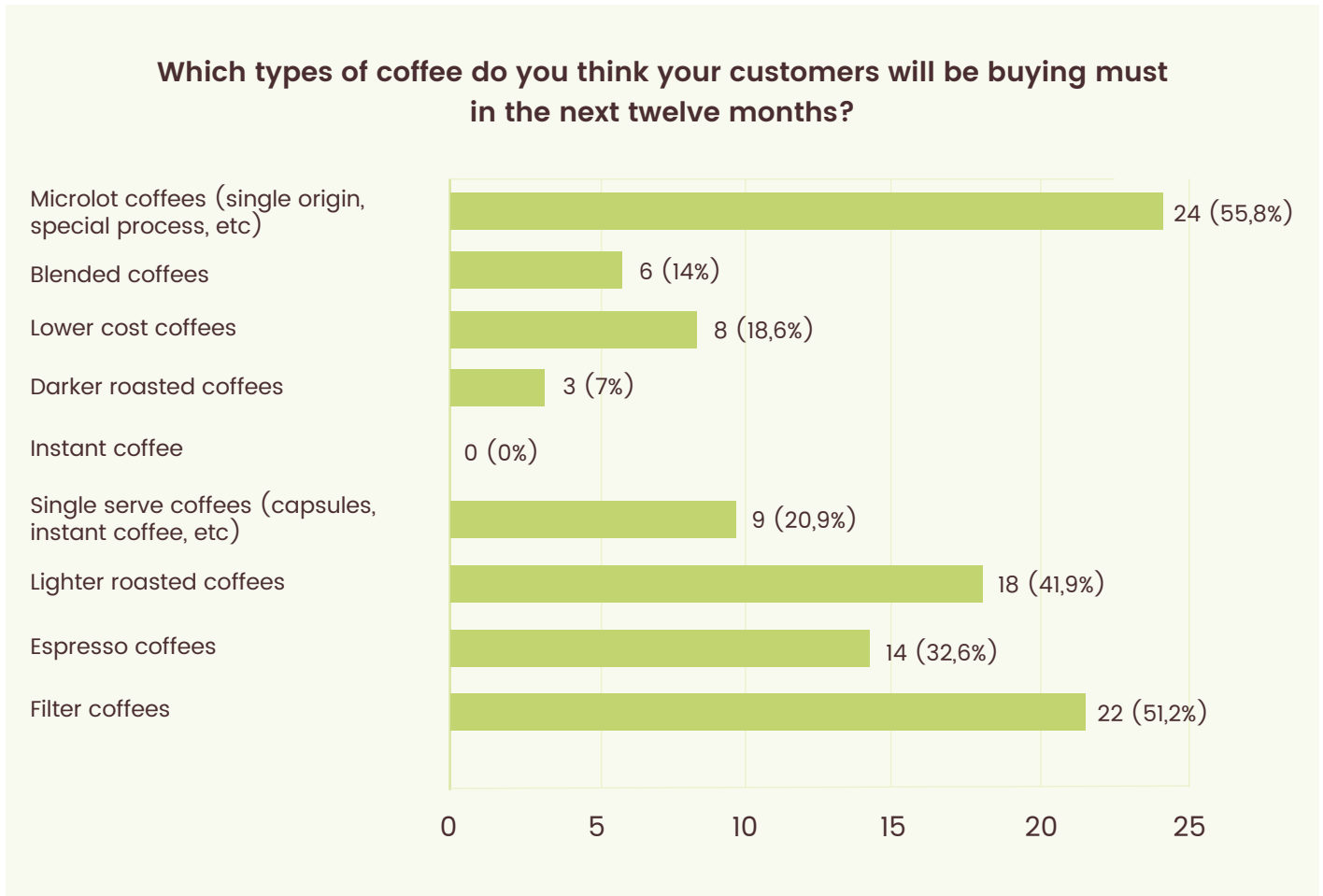
### Predictions on coffee purchasing for 2021

Below are two questions asking roasters about how much coffee they intend to purchase in 2021 and if they will be spending more on that coffee.



Of all the questions asked, the answers to these two questions paint the most positive outlook for the coffee industry in 2021. Obviously, there are some respondents who point to spending the less money and buying fewer coffees, but the vast majority of roasters we spoke to are looking at buying more coffee and spending more on coffee.

The author predicted before the survey that due to the large increase in e-commerce sales, roasters may actually be spending more on coffee in order to satisfy a demand for unique microlot coffees. We saw this also from the results of our questionnaire below:



We also see from this chart that roasters are exploring lots of new areas of growth and development in purchasing and coffee styles. With some roasting darker and some roasting lighter, some focusing on filter and others espresso. This broad range of responses may simply represent the varied businesses of those roasters surveyed.

**Outcome:**

Producers should be confident that roasters will continue to grow and expand purchasing. Furthermore, producers should slightly shift their attention to the production of microlot coffees. It is likely that the market will be able to sustain a greater volume of expensive single farmer or microlot coffees in the coming years via e-commerce sales.

## Final Comments Section

In the final comments section of the survey, we asked participants three questions:

1. If there was one message you would like to send to growers, what would it be?
2. What could producers do to help you in your business?
3. Any other thoughts?

Below are some notable responses to each of those questions.

### **If there was one message you would like to send to growers, what would it be?**

- Keep up the hard work!
- Get all the help you need and can get. If coffee is not the right crop anymore, look into new things, but try and do it slowly. With help from experts. Don't listen to people like me.
- I see you, I hear you and I believe in sustainability and the importance of a stable supply chain where everyone is paid well for what they produce. Your standard of living matters and I will try my best to be part of that change working towards an era where we are not in a price crisis.
- Quality not quantity, improve processing to achieve better cup quality.
- Know your costs and try to make it transparent to the green buyers. If you know your costs you know what you need to charge for your product. We want you to make a decent living. And if we know more about your costs we are more willing to pay a higher price as it is important to us that you stay in business.

### **What could producers do to help you in your business?**

- Direct communication is always welcome. We also appreciate producers who are interested in creating long terms relationships and also take into account our needs in terms of varieties processes etc. An open mind on both sides is always necessary.
- The more information the better, consumers love a story! A farmer showing their expertise in coffee is a great insight in moving towards transparency.
- As above, connect more to tell a full story. To help educate the roaster who can in turn help educate the consumer.
- Produce unique lots and share educational aspects about life as a producer, perhaps speak more often digitally and arrange an origin trip experience.

### **Any other thoughts?**

- Things are pretty bleak right now, but when a coffee plan undergoes significant environmental stress, it can produce delicious results. I'm looking forward to tasting the fruits of this lean period in a couple of years.
- Tell the farmers to keep up the great work. Without them there is no coffee

## Interview Analysis

Below is a series of thoughts that came out of the interview series and were not necessarily highlighted in the survey data. In addition to quotes from the interview, the author has included outside resources and data. To better understand how the interview process was created and how the interviews were conducted please see the 'Methodology' document.

### Optimism for the coming year:

The survey document does not go into extensive detail on the topic of market optimism; however, the author considers this a major takeaway from the Market Review. Overall, every single roaster the author spoke with was somewhat confident about the coming year. Even those who saw 40% declines in their business were quick to point out how much worse it could have been. This trait of resilience and optimism gives the author a lot of hope for the coming year and years ahead. Here are two quotes, one taken from a separate interview conducted by the author and the other from a news article:

*“By staying true to our core values and the quality of our product, together with our partners and customers around the world, we will emerge stronger than before.”* – Christina Meinel, Julius Meinel, Austria (Source: <https://www.comunicaffe.com/viennese-roaster-julius-meinel-is-positive-about-the-future-of-premium-coffee-post-covid/>)

*“We started our first café just a few months before the last financial crisis hit. We feel like we are in a good position to handle these financial situations and we will do well through it.”* – Klaus Thomsen, Coffee Collective, Denmark

This further quote from the CCO of Gruppo Cimbali from an interview conducted by Allegro, points us to a broad truth about the coffee industry which the author believes is well understood by roasters:

*“What I think is encouraging is the trend of upturns here and there...Coffee is a business that is anticyclical, that continues to grow in the medium-long term, despite some short-term drops, like the current one.”* – Enrico Bracesco, Chief Commercial Officer, Gruppo Cimbali

In conclusion, I believe that within the industry and especially amongst roasters there is a broad sense of optimism for the coming year.



### **Predictions of Growth in HORECA:**

A large number of roasters predicted significant growth in the HORECA/Hospitality trade in 2021. While this could be considered wishful thinking by roasters whose main business is HORECA/Hospitality, I believe most evidence points to this prediction being accurate. Consider the below:

When asked which of the following social outings they missed the most (with people being allowed three choices) of the 17 suggested social outings, an overwhelming number cited visiting cafes & coffee shops (second choice at 42%), restaurants (4th choice at 29%) and pubs and bars (fifth choice at 19%) as the thing they missed most during lockdown. (Source: <https://www.comunicaffe.com/going-to-coffee-shops-is-one-of-things-brits-miss-the-most-during-lockdown/>)

Under the present Lockdown, due to COVID-19 pandemic, the things that Croatians miss the most are spending time with their friends (78%), travel and outings (48%) and enjoying a cup of coffee in cafes (44%), according to a survey carried out by the Henda market research agency and coffee maker Franck. (Source: <https://www.comunicaffe.com/drinking-coffee-in-cafes-is-one-of-the-things-croatians-miss-most-under-lockdown/>)

These survey's correlate directly with the comments roasters made relative to their predictions for HORECA/hospitality industry:

*“From what I've heard from people, they really miss cafes and restaurants. People really want to get out there and make connections. To meet in person with each other. When the restrictions come down I think all of these places will be busy.”* – Lukasz Mrowinski, Etno Café, Poland

*“In my opinion, after a crisis or a war, there is like an elastic band that is released. That the tension is growing but when the elastic band is released, well consumption will go up a lot. Business will bloom. As a roaster, I'm expecting a very good 2021.”* – Davide Cobelli, Garage Coffee Bros, Italy

*“E-Commerce will drop off as people start going back to cafes and restaurants. It will be higher than before but it will drop off. People will get tired of sitting at home. I think there will be two types of people: one who think that buying goods to be delivered is nicer than going out, and then there will be those people – I believe the majority – who will be missing going out and will likely go out to buy everything and visit cafes a lot.”* – Raimonds Zadvornovs, Kalve Coffee, Latvia

*“I'd predict that restaurants will come back in a big way. People miss going out a lot and so HORECA trade will return as soon as the vaccine rolls out. What I'd expect is that some consumers will demand better coffee in restaurants; exactly because, as I said, they themselves are getting better at brewing coffee at home. I think this could be a great area for us as restaurant trade up from normal commercial coffees, to better commercial and low specialty options.”* – Niels te Vanhold, Mocca d'Or, Netherlands

In conclusion, the author believes that in 2021 we will see HORECA/hospitality business doing much better than in 2020 and in turn providing considerable new business growth for roasters.

### **Patterns of Purchasing are Changing with Roasters**

Multiple roasters commented that they have begun exploring working with new importers since the COVID crisis began. With e-commerce growth causing major shifts and pivots in roasters businesses, many have found themselves needing coffees they don't normally receive from their importers. Similarly, it has meant some roasters have had an excess of time and with that time they are reevaluating their business structures. As Claudia San Witty from Cafes El Magnifico put it: "[The biggest area of] Growth [for our company in 2020] was definitely in the organizing and the structure of the company."

This trend was smaller than other trends reported but significant enough to be mentioned in this report.

### **Patterns of Home Purchasing Changing**

Two trends were mentioned again and again in the interviews, with regards to consumption by consumers: firstly, the rise of e-commerce, and secondly, the use of better (especially espresso) equipment at home.

With regards to e-commerce, multiple roasters mentioned the figure of 400% growth. Regardless of the accuracy of this figure, it does appear that the online segment of coffee sales has exploded. Even the roasters who had not experienced this growth were aware that many other roasters had. Below are some examples of this trend:

*"In particular, our online sales went well because we were one of the first people with a webshop. We've been running a webshop for years. We had a good e-commerce system setup online and in the roastery; we just never really pushed it [to customers]. What we did find is that people who had subscriptions for maybe, one bag a month, moved their subscription to a bag or even two bags per week. Lots of new subscribers as well."* – Lisa Lawson, Dear Green Coffee

*"However, in my opinion, COVID helped us. It helped us to sell more online in particular. In terms of 'personal' sales, that is sales made in person, the wholesale part of our business was the most important segment. I'd say that before lockdown 80% of our sales were in wholesale and 20% was B2C. While we gained a lot of online sales, it could not compare with the losses made in our wholesale business. No matter how much you sell online, you can't sell that much coffee to one person."* – Davide Cobelli, Garage Coffee Bros

The other major trend, that of improved home user skills and equipment was noted by multiple interviewees (Lisa Lawson, Lukasz Mrowinski and Niels te Vanhold). In fact, these interviewees all pointed specifically to the idea that this growth in consumer education will be reshape the industry in the future.

Quotes below:

*“I think the home market has changed completely, at least in the UK. People who had instant [coffee] before, have upgraded to a French Press/Cafetiere. Those who were using a French Press have bought other new brewing equipment... In turn I think that shift will put pressure on hospitality. Because people might demand better coffee when they go out because they have better coffees at home.” – Lisa Lawson, Dear Green*

*“People have definitely had a lot of time to learn about coffee. To watch these new movies like Higher Grounds and Coffee Heroes. All of these tutorials and movies, I think consumers will be more educated than ever next year.” – Lukasz Mrowinski, Etno Café*

*“I really think a growth in home users is the new trend. A lot of people won’t go back to working in an office. That segment of the market is a really bad place to invest in, where a year ago it was seen as a great place to focus on [meaning offices]. A lot of people are getting much better home set ups – new espresso machines, better brewers and so forth. Those people will want good, chocolatey, simple coffees that are better than supermarket stuff but not super specialty. I think that will be the biggest area of growth, people getting coffee that’s low specialty for home consumption.” – Niels te Vanhold, Mocca d’Or*

As further evidence of this trend, one survey conducted by YourSay and Volcano Coffee Works, pointed to a £2.15 Billion spend by consumers in the UK on coffee equipment this year. (Source: <https://finance.yahoo.com/news/brits-spent-over-2bn-replicate-070000876.html>)

In conclusion, the author can comfortably predict that e-commerce and a growing improvement of home user coffee skills will be trends that will continue to impact the nature of coffee consumption and purchasing for the coming twelve months.

### **Growth in sales at grocery stores/bakeries**

The survey data did not suggest a trend of growing specialty coffee sales at grocery stores or bakeries. However, in interviews, four different interviewees all mentioned this sector as one of the strongest in the face of the pandemic. It is possible that this growth is regional and not reflected across all of Europe, nonetheless the author felt this was noteworthy. Here are some examples from the interviews:

*“There are stores in Sweden, that retail other brands, you could see them as distributors; they focus on just selling coffee and tea to end users. Those businesses seem to be doing well... The resilience of coffee businesses has been impressive. The way that roasters are finding ways to get more coffee to the end consumer. Bypassing the cafes, because they have been closed. Roasteries selling online or, I saw one roaster was selling their coffee in Lidl. All the Lidl locations in Sweden had their coffee for a few months. There are other ways to sell your products, and there are more markets. I think that exploration of more markets will keep happening next year. People will realise, if we do this and that, we can sell more coffee from our roastery to consumers directly.” – Ben Norman, Lykke*

*“[The best customers for us these days have been] bakeries. They are our best clients right now. They have seen strong increases. They are like other shops, you can go in buy bread or coffee, so they can stay open and stay busy.”* – Adrian Simion, Guido Coffee

And in some instances, coffee roasters are even changing their businesses to resemble more of a grocery store:

*“We have significantly changed our coffeeshops. We treat them much more like a shop now. A delicatessen you could say. We stock kinds of hummus, soups and these other grocery products.”*  
– Lukasz Mrowinski, Etno Cafe

Once again, this trend may not be as strong as others listed in these analyses, however, the author feels that grocery stores and bakeries are likely to retain some degree of specialty sales that they previously did not enjoy. It is possible also that more specialty roasters will find audiences via grocery stores and through outlets they have previously ignored.

### **New Importers poorly representing producers**

One topic that came up a number of times was how many importers are now in the market. Several roasters complained that there are too many importers now. In fact, this is a topic that the author has heard talked about a lot over the last few years. The reason the author draws the readers attention to this (slight) trend is the fact that good producers may be being poorly represented by bad importers. The owner of Kalve Coffee, for example, talked about purchasing some high quality coffees from a new importer but running into so many logistical problems with them that they will not purchase from this importer again. James Bailey from Workshop Coffee also mentioned an example of purchasing a Ugandan coffee one year and then reaching out to the exporter the following year and never hearing back from them; so, a repeat purchase was not made. What this suggests is that there is a weakness in the quality of service being offered by new importers and that this is potentially damaging to producers' sales prospects. This result in turn makes the Algrano platform potentially more suitable and desirable for producers who are worried about these problems.

### **Two Examples about Working with New Producer/Importer Partners**

As a case study, the author believes it is interesting to highlight two particular stories that came up during the interviews about roasters who began working with new importers/producers and what that was like.

In the first story, the interviewee and interviewer are exploring a look at how James Bailey of Workshop Coffee began their relationship with Promoting Peru:

“Our new Peru's are amazing. Where you working with us when Promoting Peru approached us?

**SR: No, that was after my time.**

**James Bailey:** We get a lot of cold call emails: ‘can I send you samples?’ We never say no. We always take the samples. But nine times out of ten our response is the same: ‘sorry, but these aren’t for us, but here are our notes.’ So [when Promoting Peru contacted us] the first thing I did was say ‘these samples are quite good, but we need to know more, we need to know traceability.’ So, I sent 40 questions. Really in-depth. Almost as an exercise of ‘just how far can I go with this’. And Promoting Peru, responded with detailed feedback having spoken to the Associations involved and really gave me so many details. So, we bought two lots. That was three years ago. Then we travelled with them the following year. And now that is one of our biggest origins – all from a cold email.”

The second story I’d like to highlight is that of Philipp Reichel from VOTE Coffee and their connection to the new importer CLIMA:

Philipp Reichel: “CLIMA is the newest importer we work with [paraphrased]. They were amazing, they are a new company and we had a lot of questions. When we had questions that they couldn’t answer, they wouldn’t try to avoid the questions but would go away and a week or two later bring those answers to us. So, that was also really interesting to see. Being able to see how honest they were convinced us to work with them.”

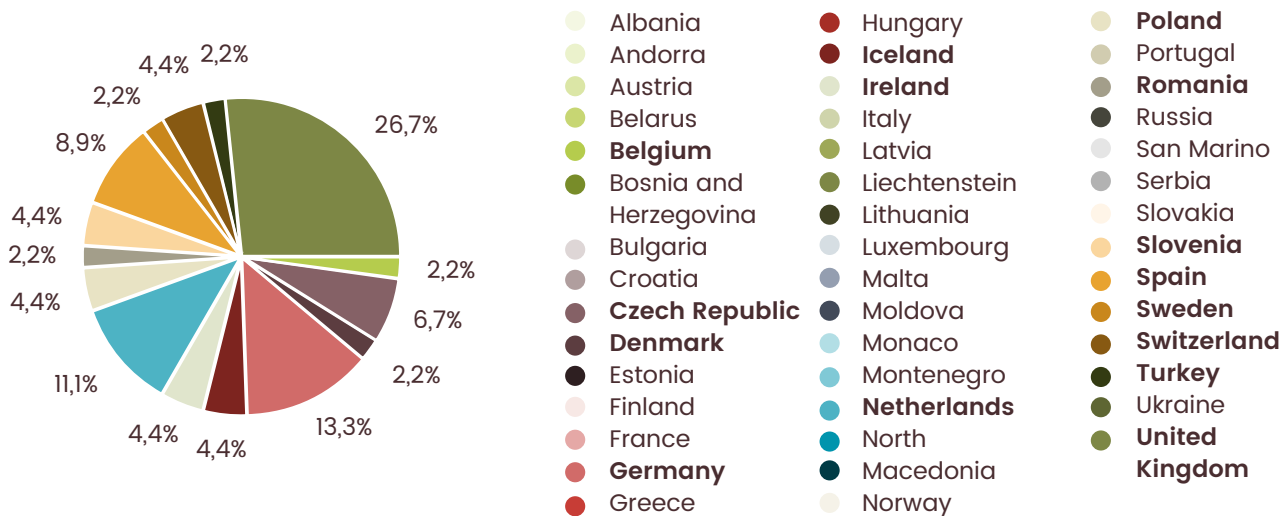
What is noteworthy from these two examples is the use of questions to secure trust. In both instances, the roasters asked a questions to the importer/producer in order to ascertain how well educated they were with regards to the coffees they were selling. A strong awareness of the coffees and a strong sense of honesty and trust helped bridge a gap between the roaster and the new partner. **What is significant for the market review here is that producers should be prepared to answer a lot of questions and to use information about their own business in order to build trust and security.**

*This concludes the interview analysis portion of the document.*

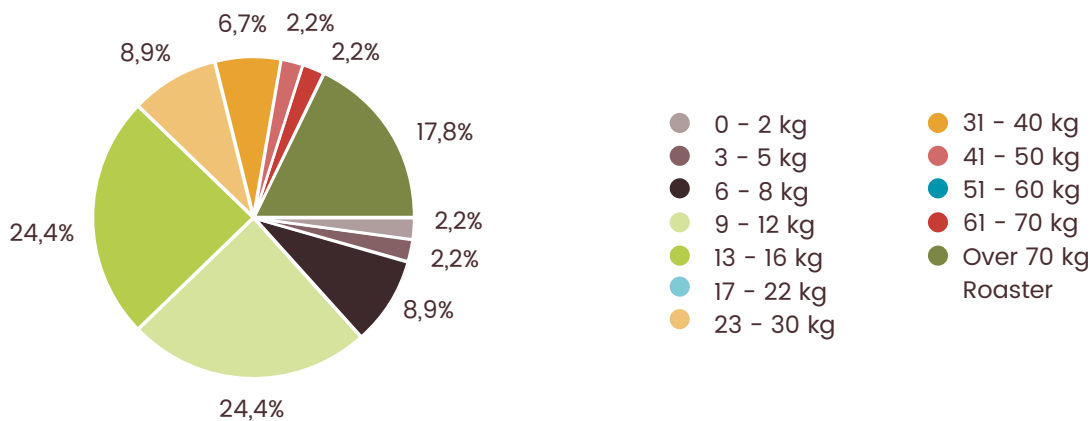
## Survey Results and Interview Transposition Documents

Below follows the full outcomes of the data from the survey in chart form and each interview in full. An Excel document of the survey results has also been made available to Algrano.

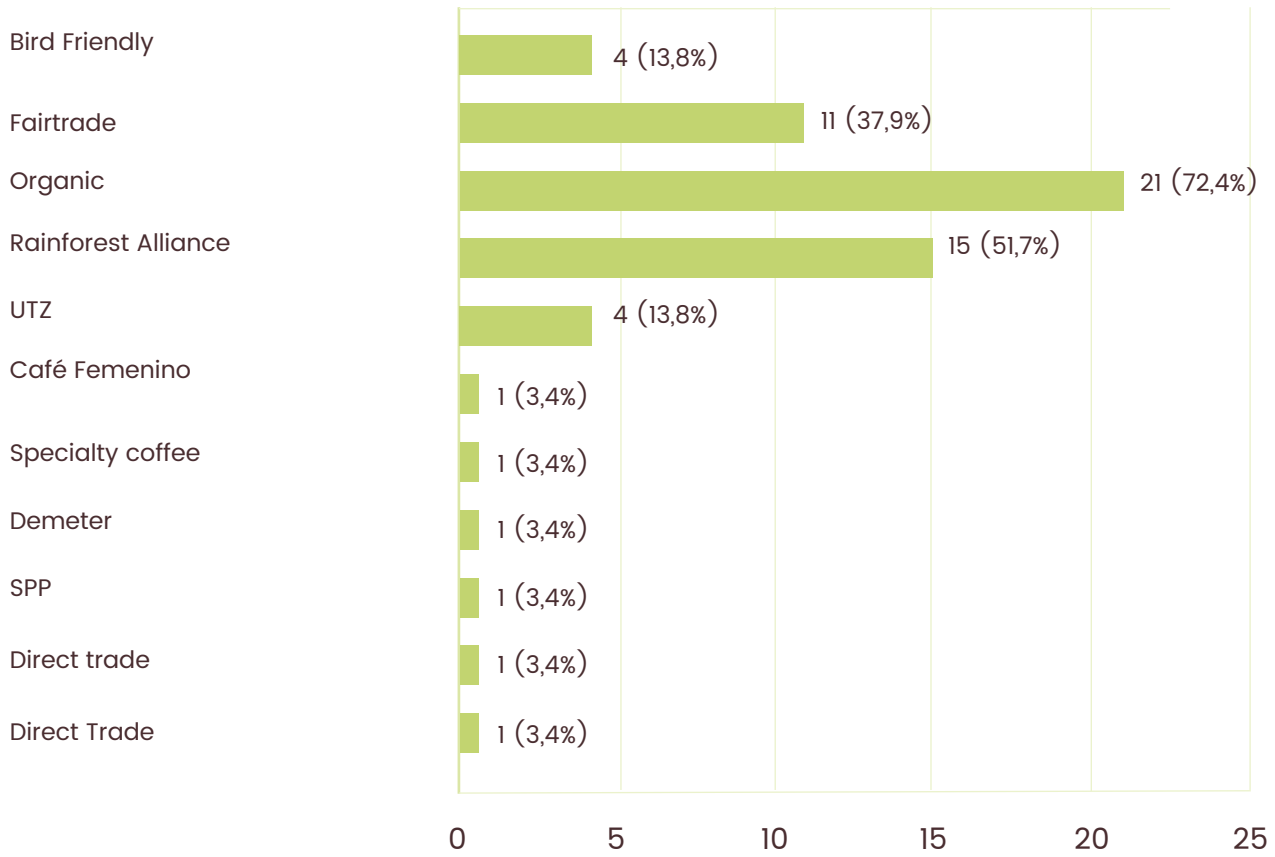
### Where are you based?



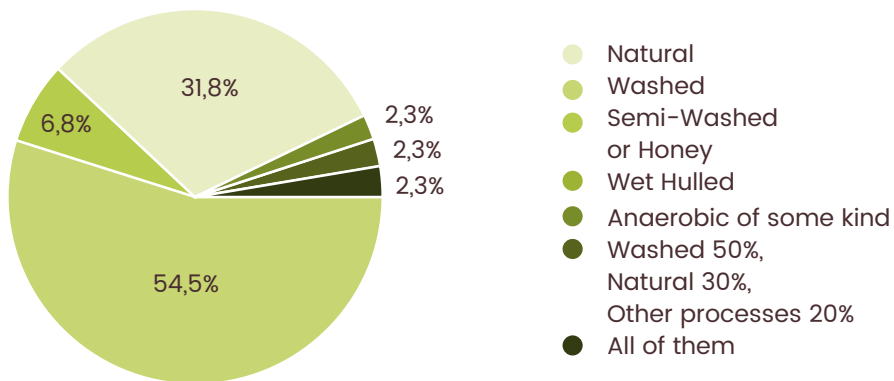
### What is the largest roaster you use (in kg)?



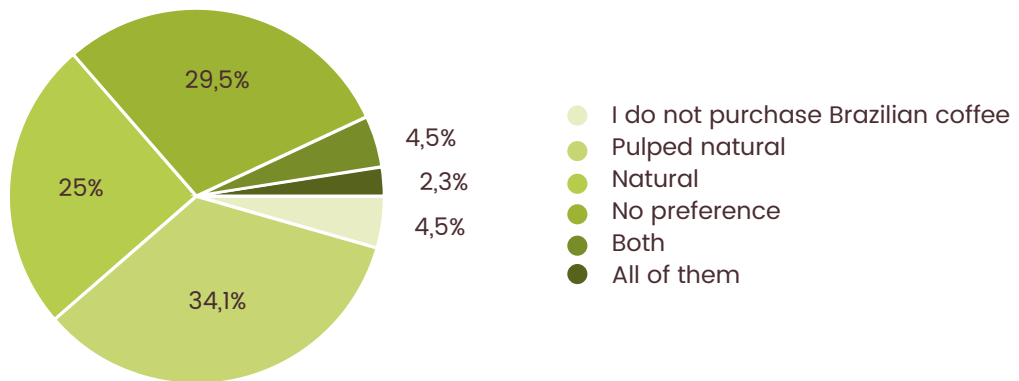
## Do you use any of the following certifications?



In volume terms, which processing method do you buy most?

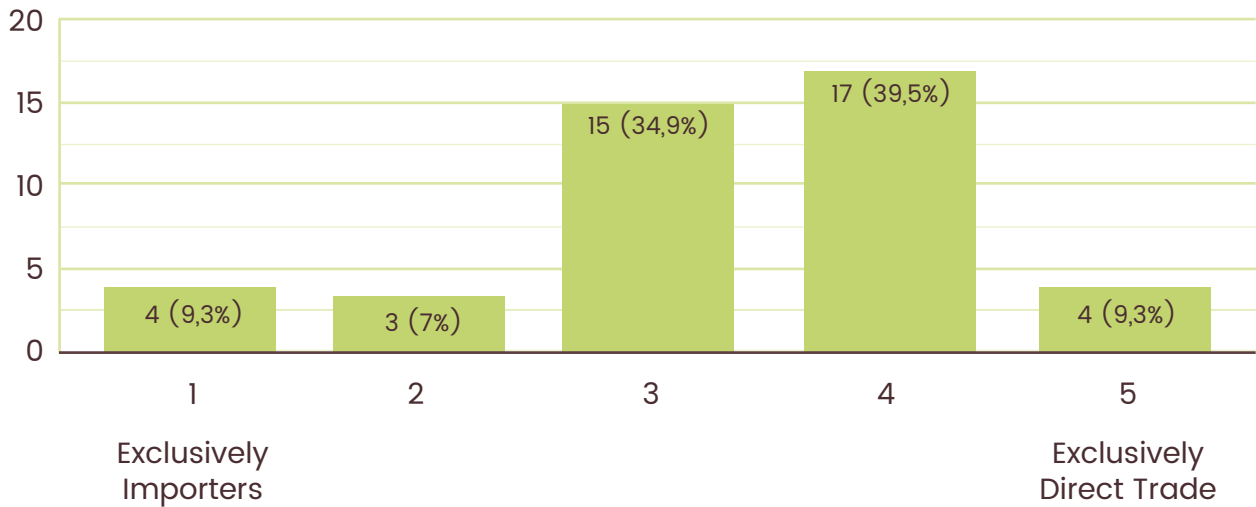


If you regularly purchase Brazilian coffees, do you prefer pulped natural or full naturals?

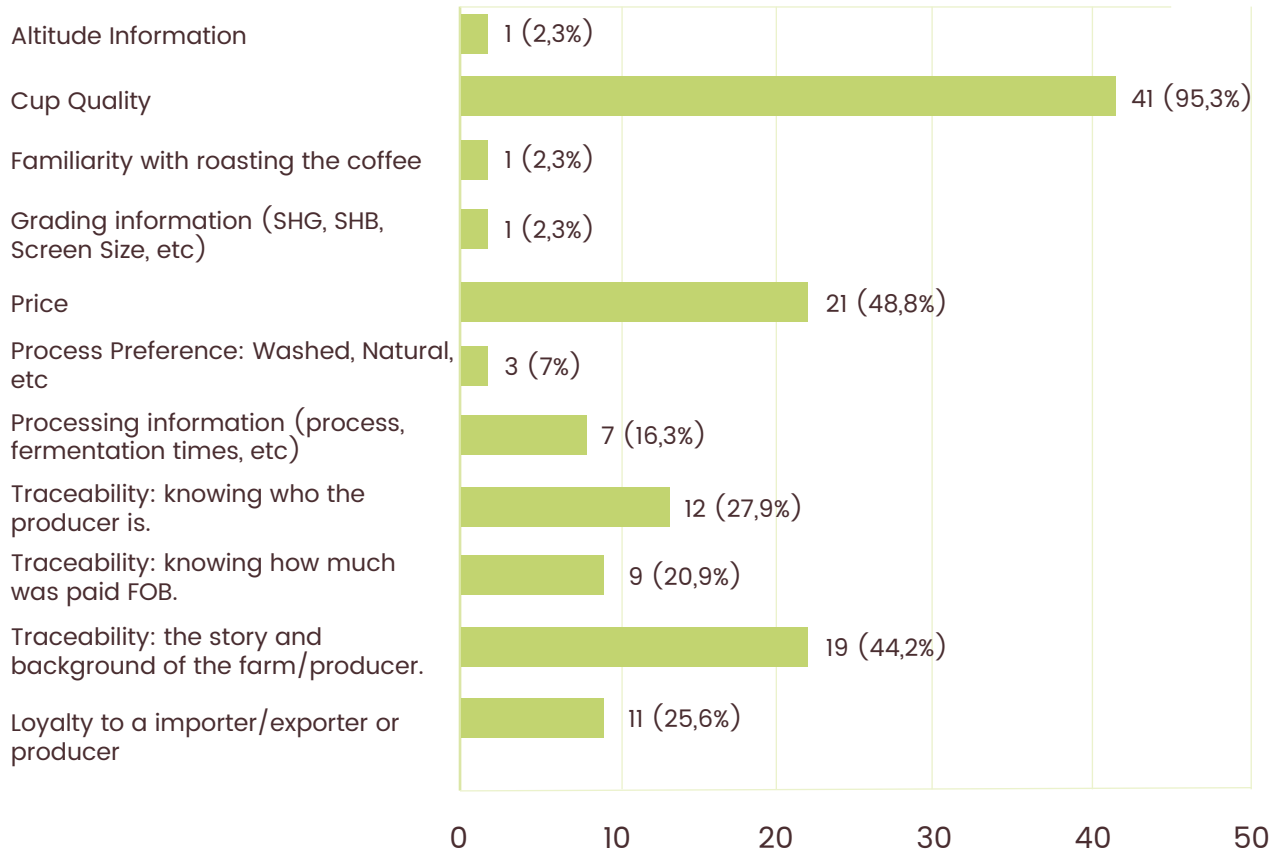




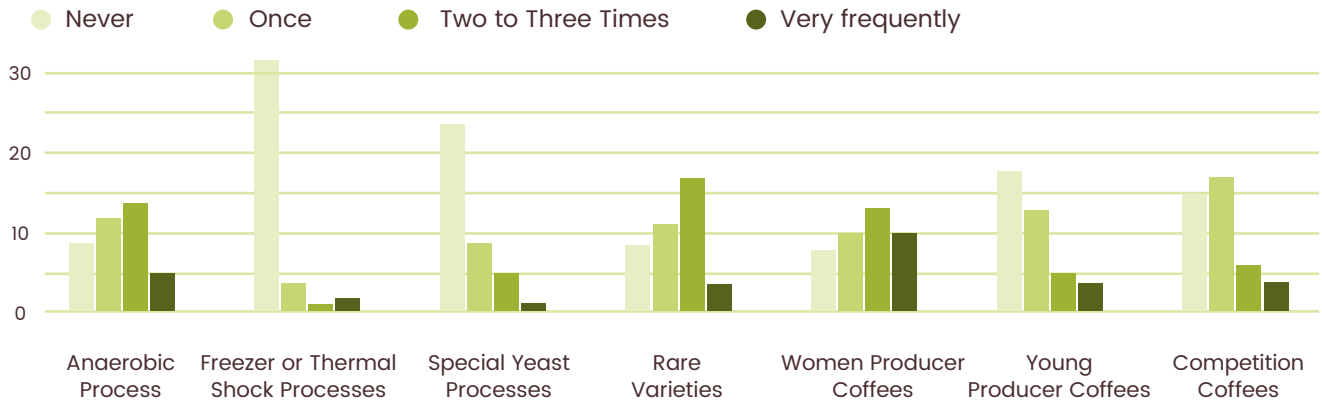
**Is it your preference to work more with importers or more with direct trade options?**



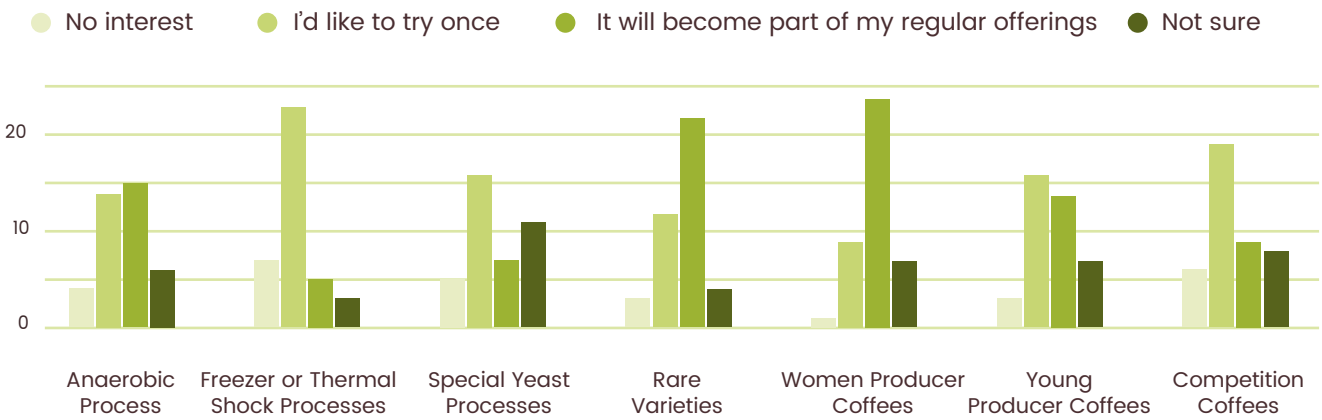
**Please select the THREE most important criteria for making a coffee purchase:**



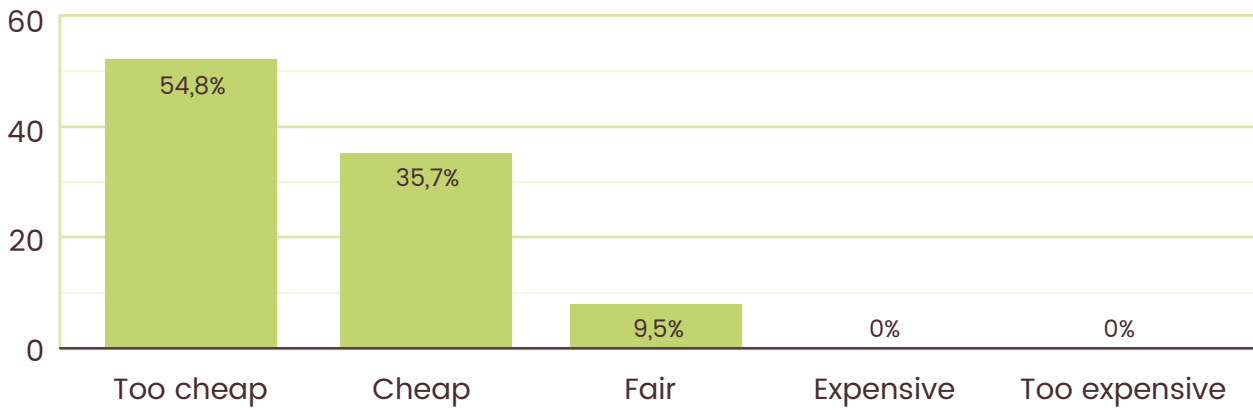
**Have you bought any of the below in the PAST year?**



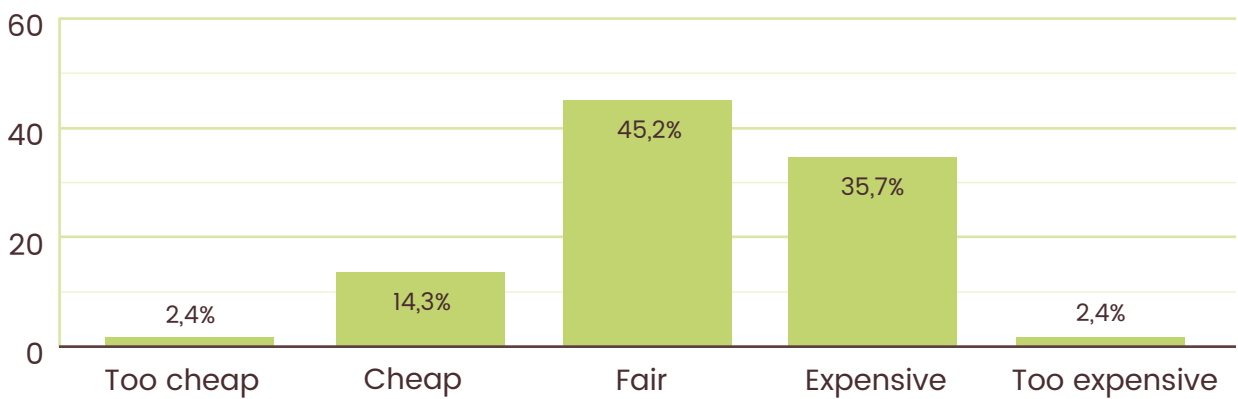
**Would you like to purchase any of these coffees in the NEXT twelve months?**



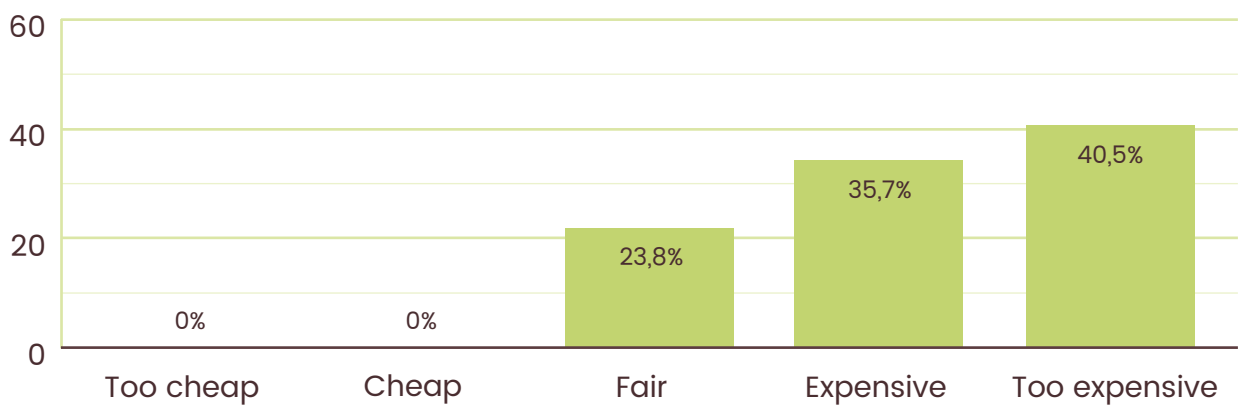
Do you consider \$2.30 (€2.00) per kg FOB a fair price for an 82 point coffee?



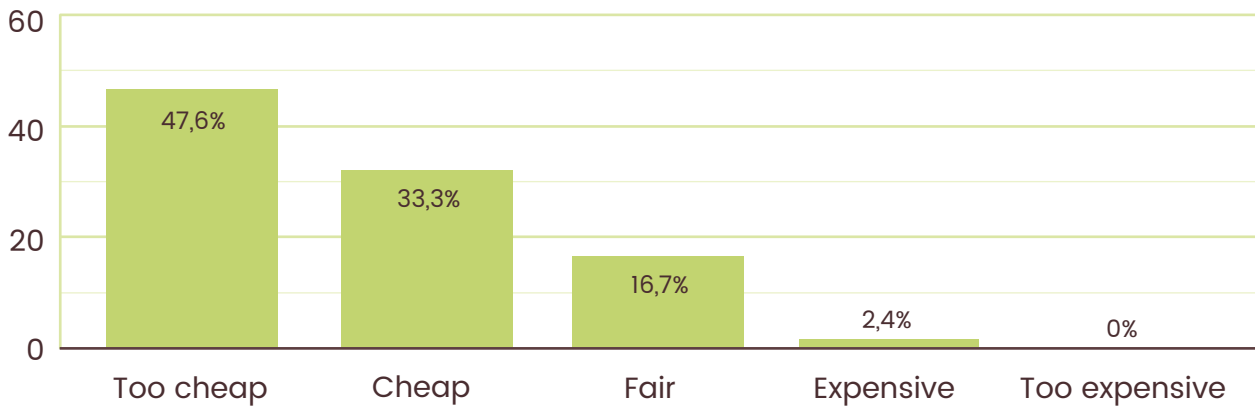
Do you consider \$5.30 (€4.50) per kg FOB a fair price for an 82 point coffee?



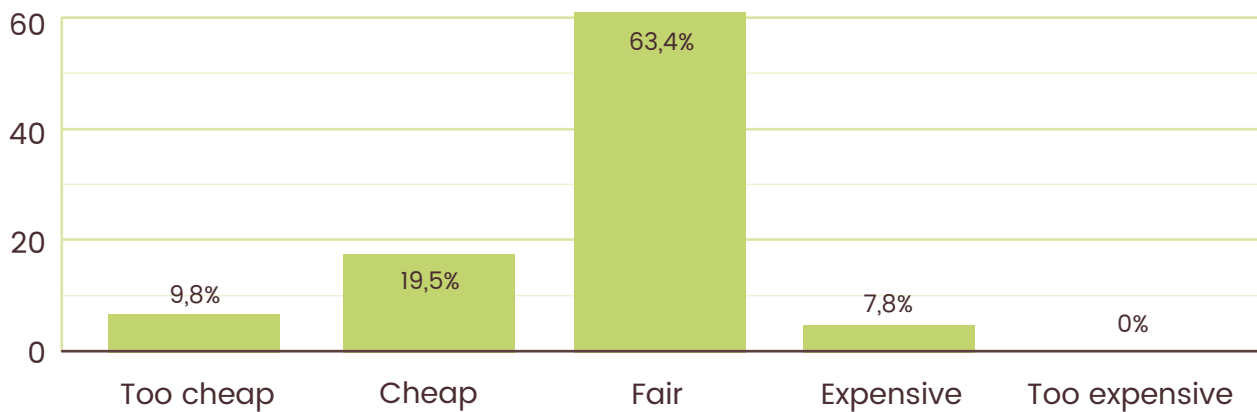
Do you consider \$7.00 (€5.90) per kg FOB a fair price for an 82 point coffee?



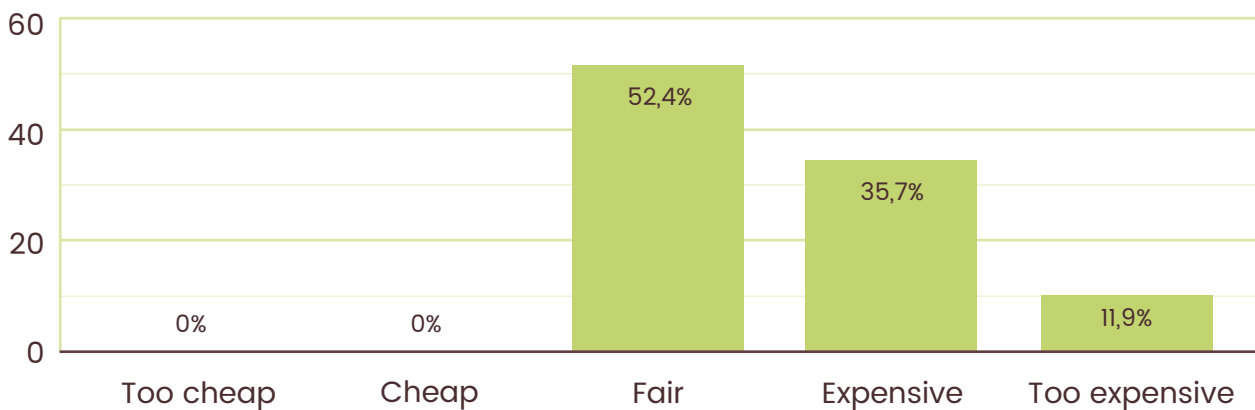
Do you consider \$3.80 (€3.20) per kg FOB a fair price for an 84 point coffee?



Do you consider \$5.80 (€4.90) per kg FOB a fair price for an 84 point coffee?



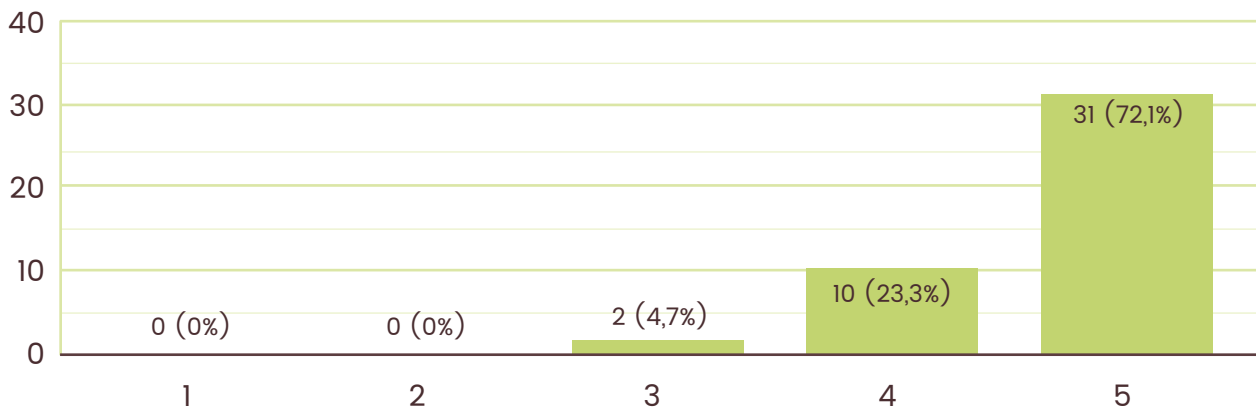
Do you consider \$7.50 (€6.30) per kg FOB a fair price for an 84 point coffee?



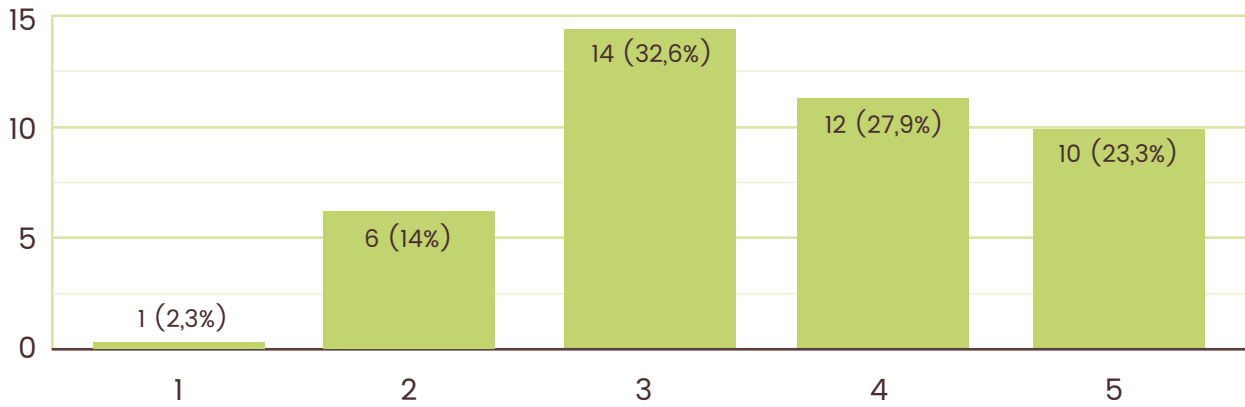
**At what price point is a coffee too expensive regardless of quality. Prices per KG.**



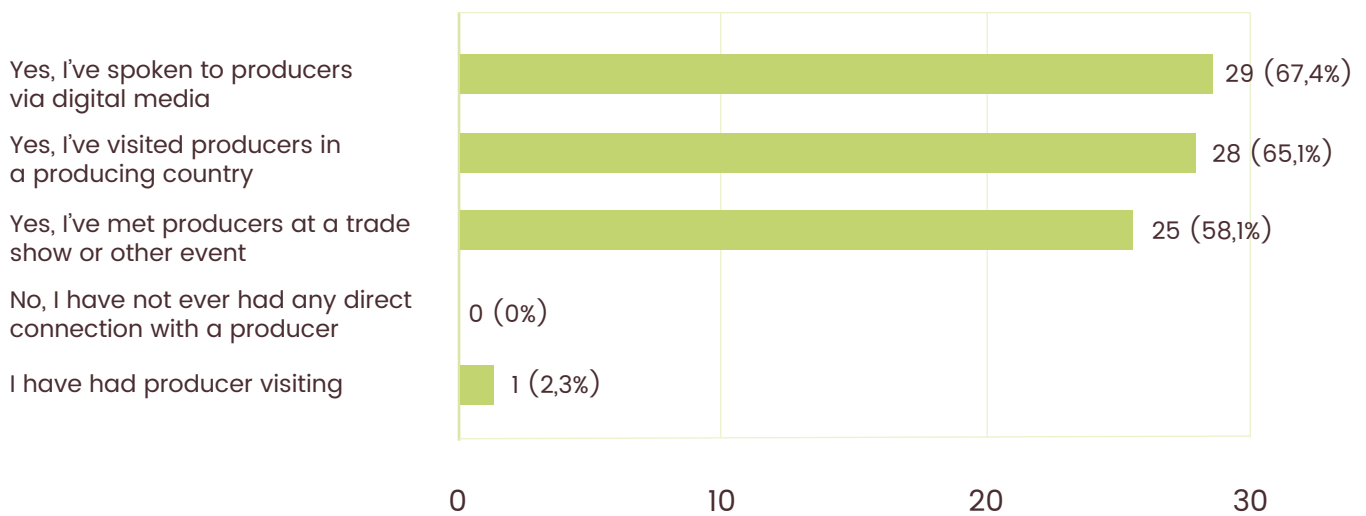
**How important for you is it that producers are well paid for their work?**



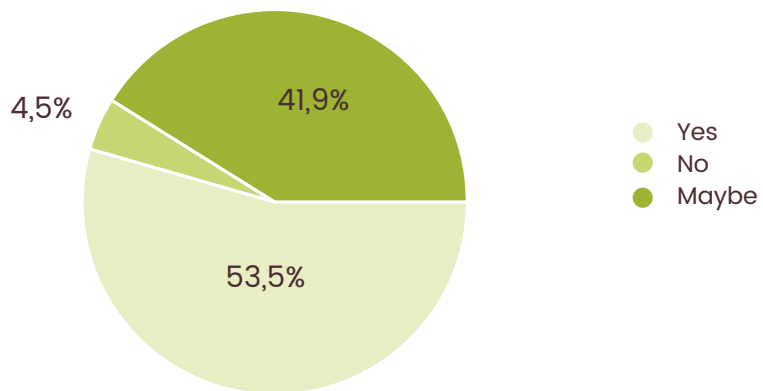
### How much certainty do you have that producers you work with are well paid?



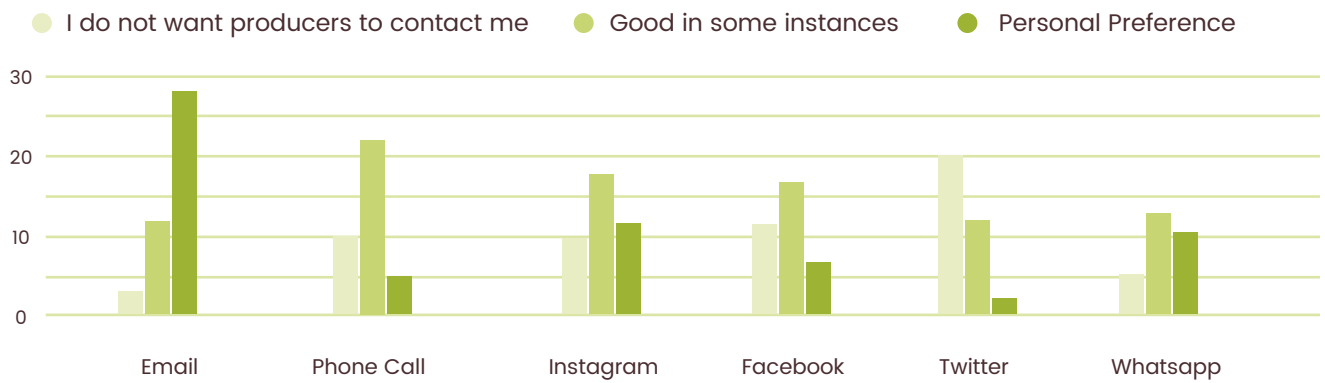
### Have you had any direct connection with farmers in the past?



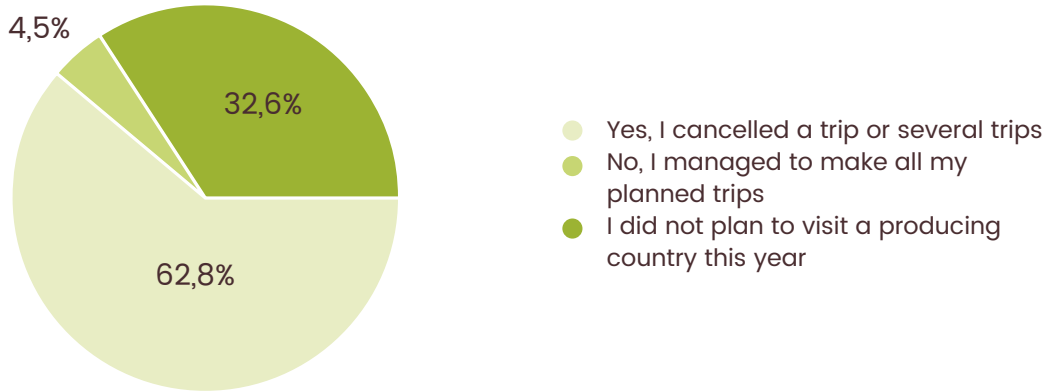
## Would you like producers to reach out to you directly?



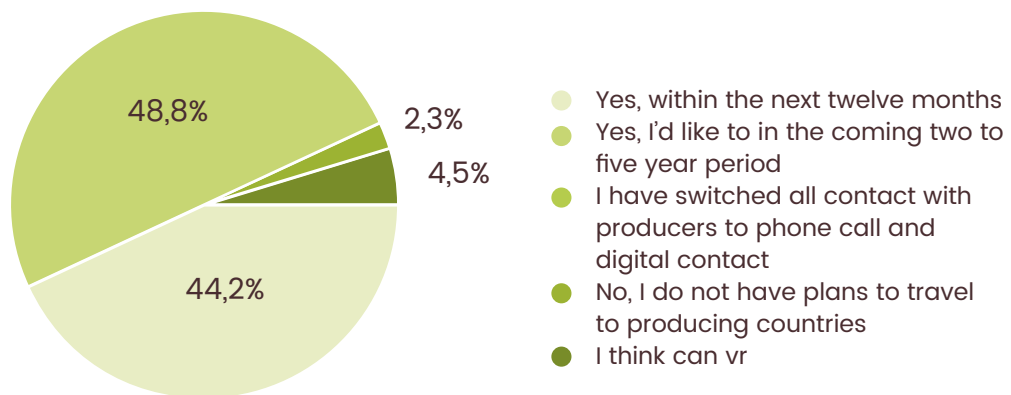
## What would be the best way for a producer to contact you?



**Since the beginning of COVID-19, have you cancelled any plans to go to a producing country?**

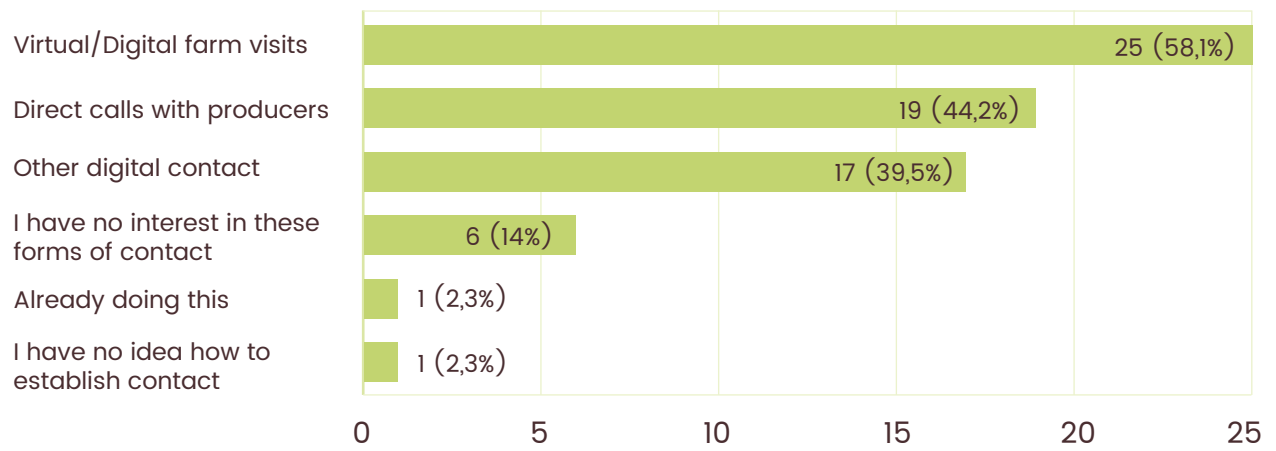


**Do you plan to visit a producing country in the future?**

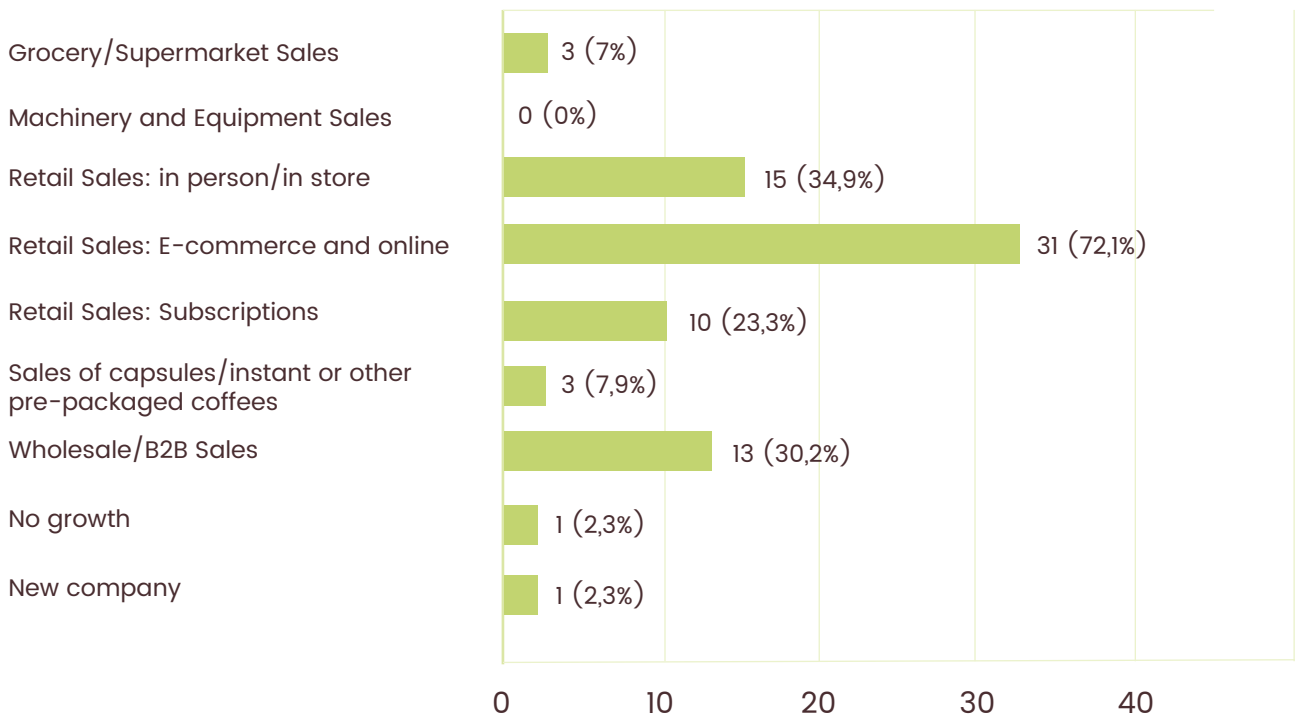




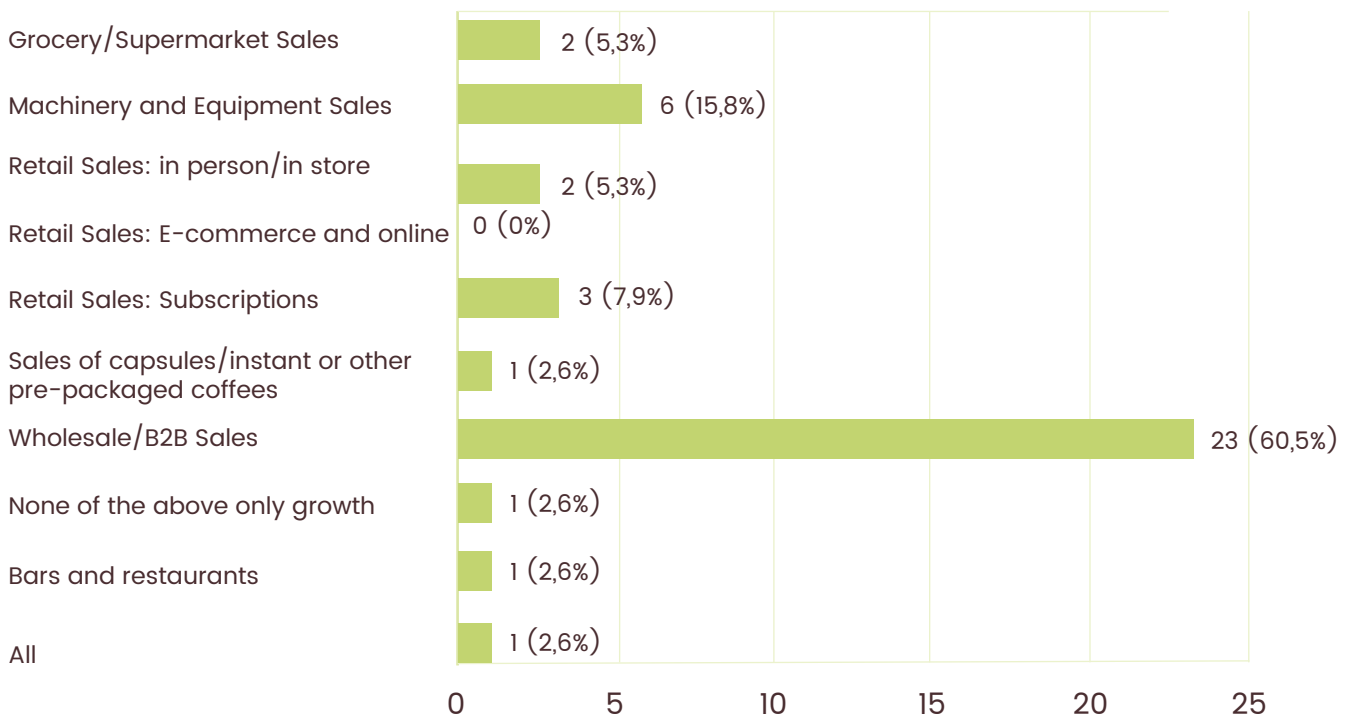
**Do you have interest in virtual/digital farm visits, phone calls with producers/exporters, or any form of digital connection with producers?**



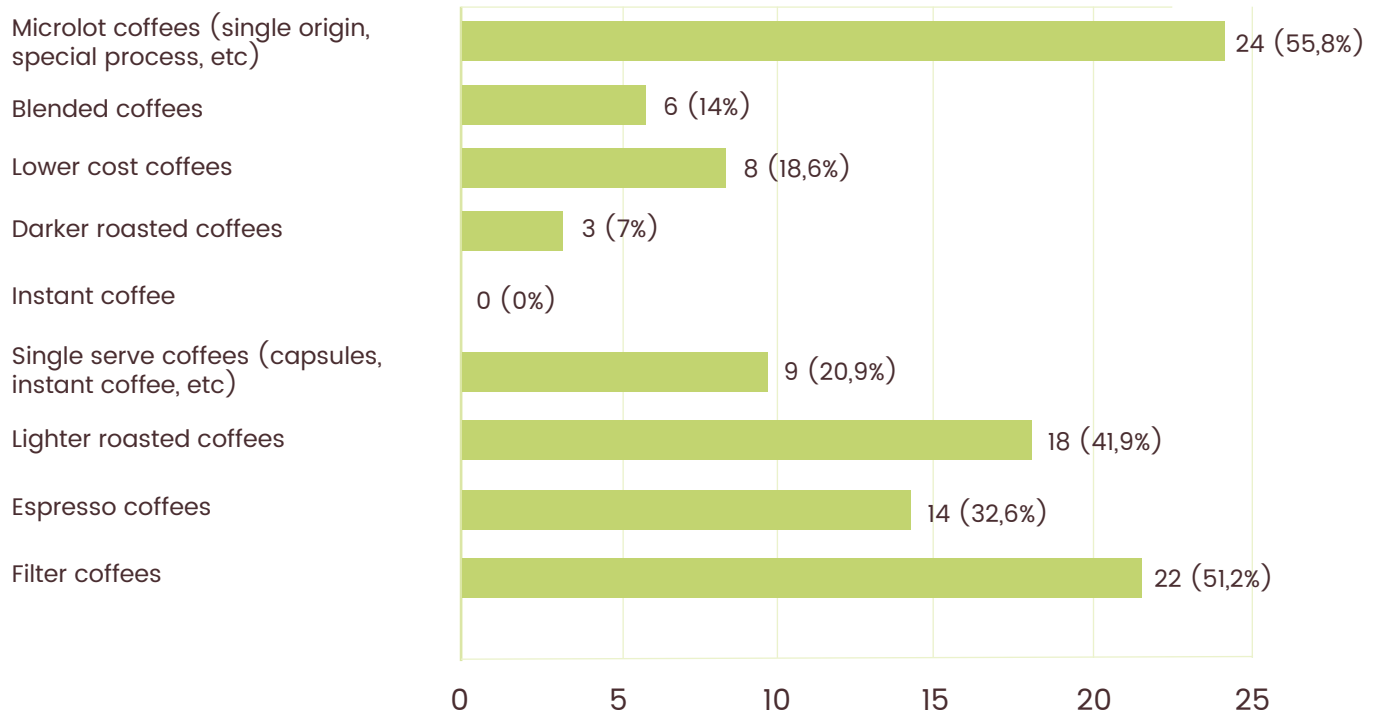
**Where have you seen the largest growth in your business over the past twelve months?**



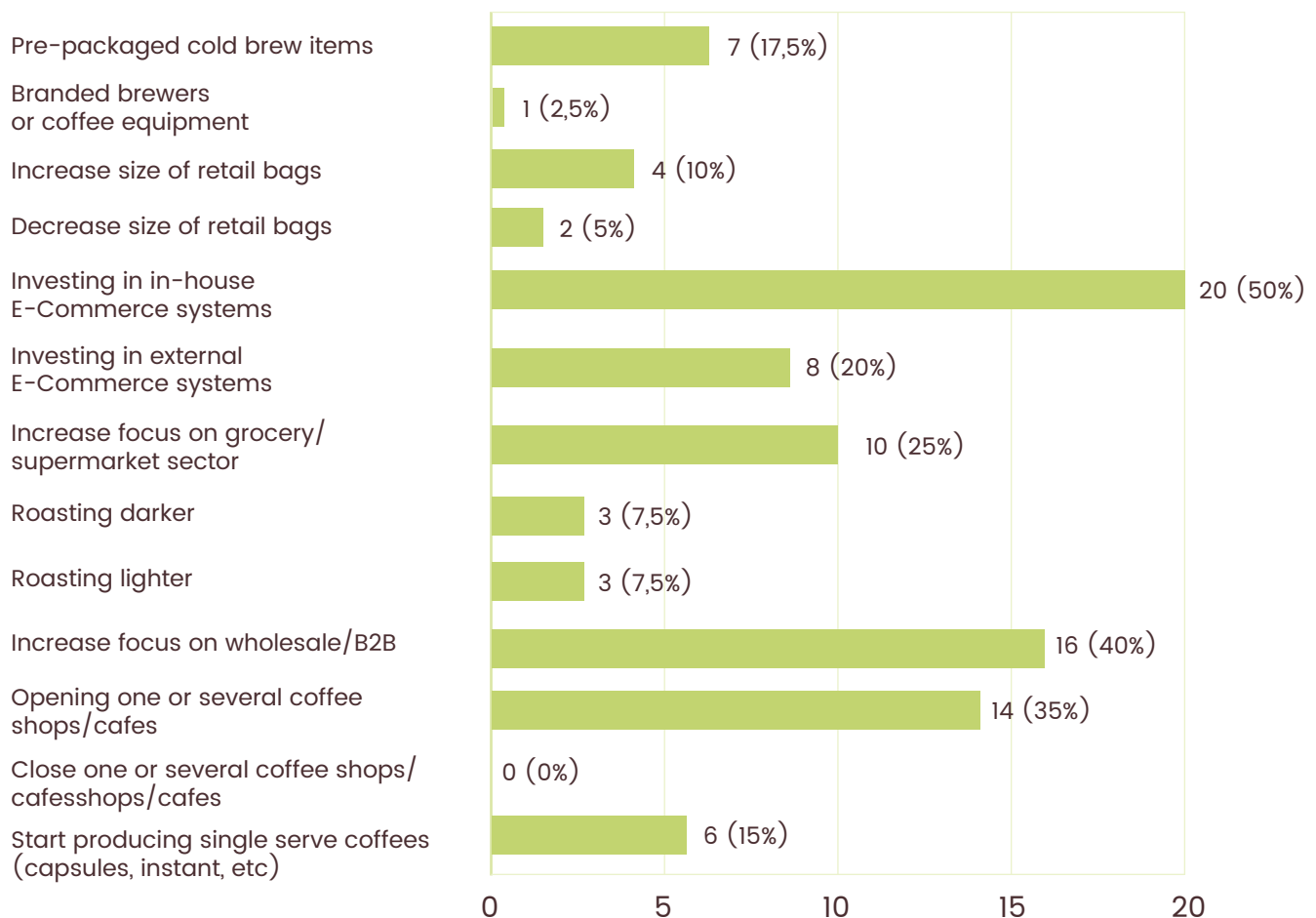
**Where have you seen the largest decline in your business over the past twelve months?**



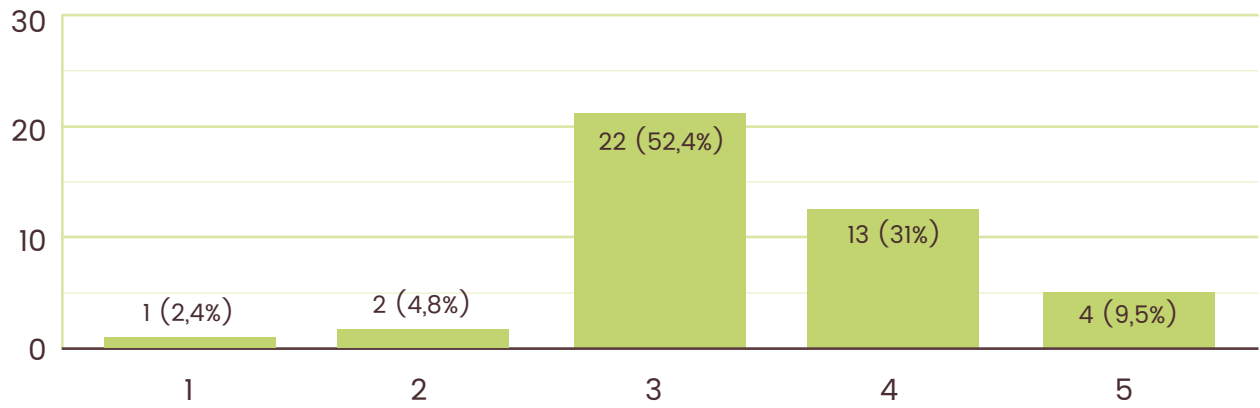
## Which types of coffee do you think your customers will be buying most in the next twelve months?



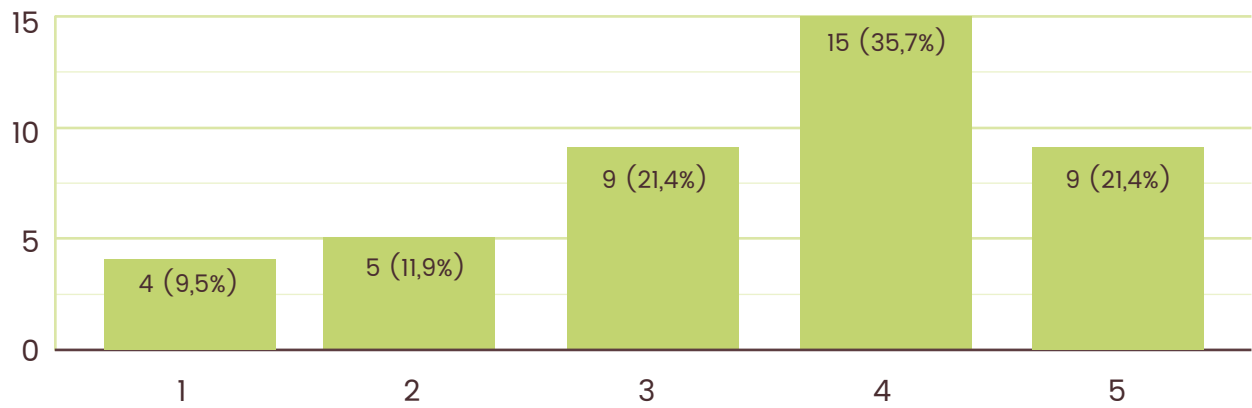
## Do you plan to start any of the below projects or making these changes?



**Do you intend to spend more on coffee in the next twelve months?**



**Do you think you will buy more or less coffee in 2021?**



## References:

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<http://www.ico.org/documents/cy2019-20/cmr-0620-e.pdf>

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Global Coffee Festival interview with Enrico Bracesco, CCO of Gruppo Cimbali

Key Note Presentation on COVID-19 and Coffee at the Middle Eastern Coffee Conference, Stuart Ritson



