



NETHERLANDS IN HOME COFFEEMARKET



NIQ-GFK INSIGHT
SUMMIT
NETHERLANDS 2024

Coffee: een **unique category!**



87%
Of NL HH buy
Coffee (GfK MAT Q3 '24)



#4
Cups/day (Koffie &
Thee NL)



Nr.1
Chosen drink after
water (Kantar)

Coffee: een **unique category!**



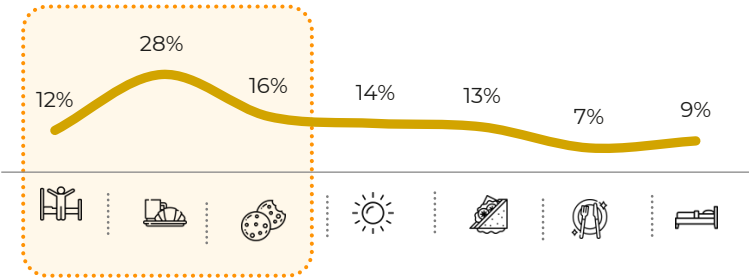
62%

Black



38%

White



2/3 CONSUMPTION MOMENTS BEFORE 12'O CLOCK

Coffee: important category for **retailers:**

Bron: GfK, MATQ1 2024 (SM)



Penetration

87%



purchase
Frequency

#12,3

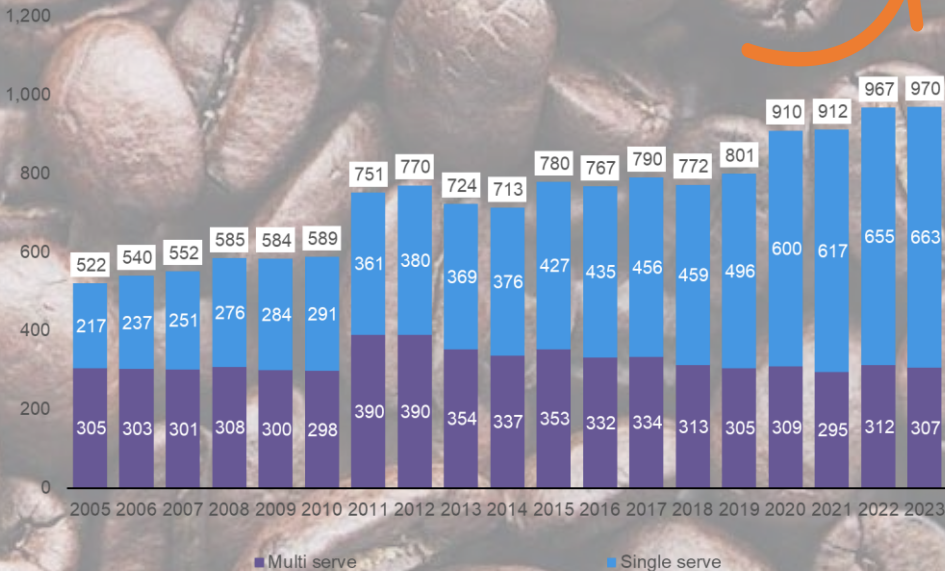


Spent
per trip

€8,46

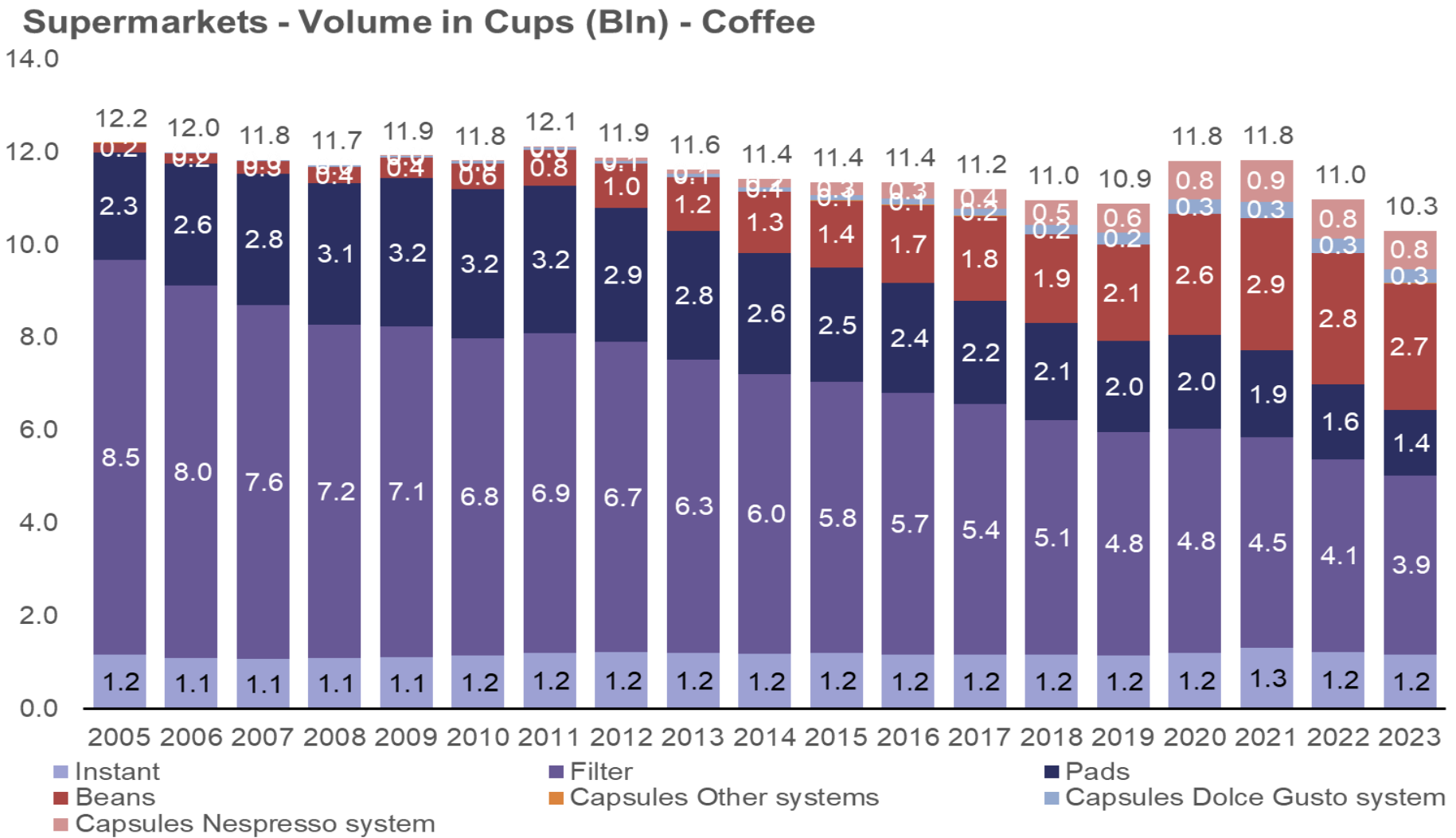
**And continues to grow
1 miljard!**

Supermarkets - Value in Euro (Mln) - Coffee



Total coffee market declining in cups

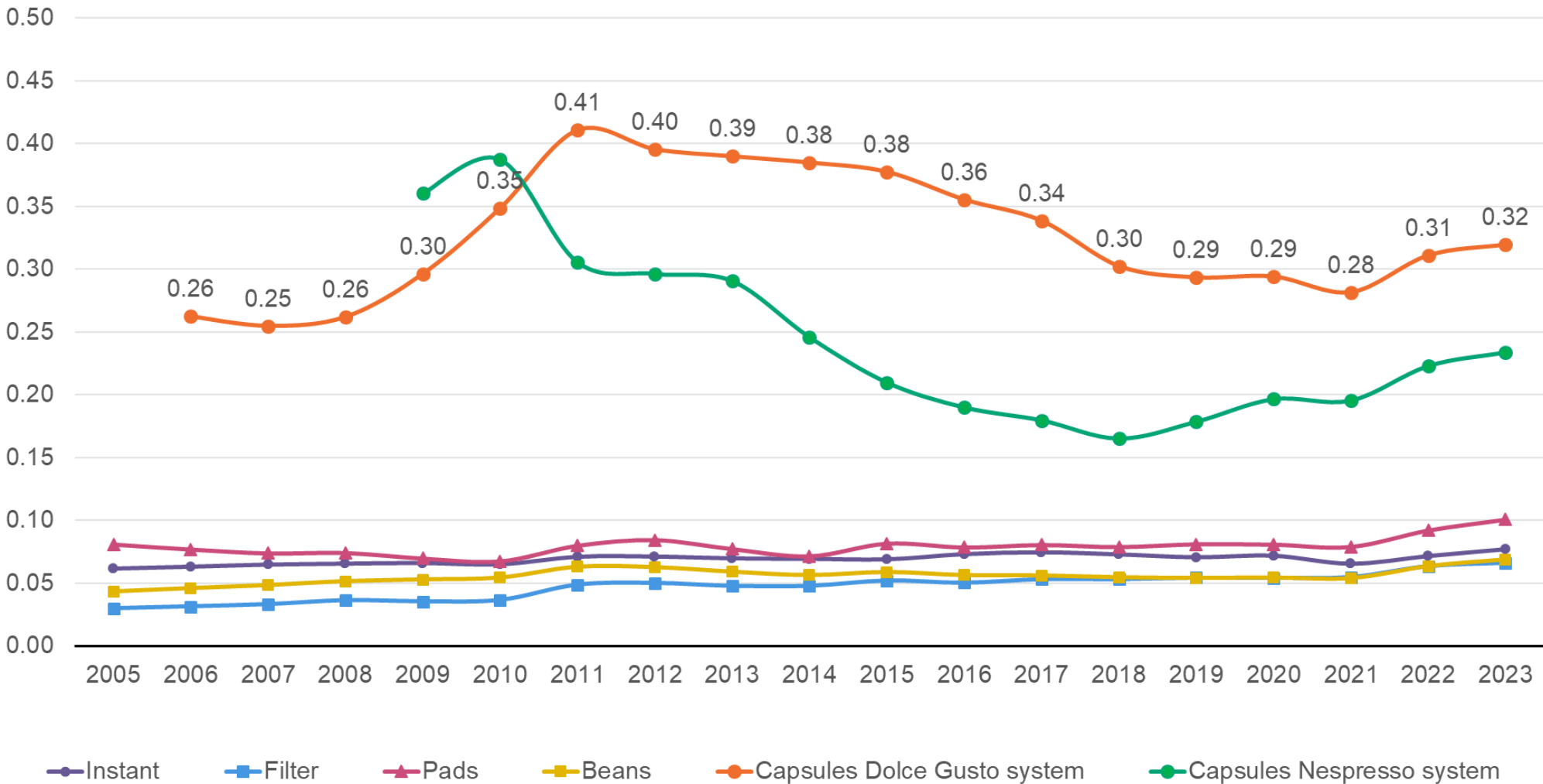
Driven by decline in filter and pads



Nescafé Dolce Gusto adds most value – with the highest price per cup

Note: Nespresso systems in Supermarkets channel is mainly other brands such as L’Or and Starbucks, not the Nespresso brand

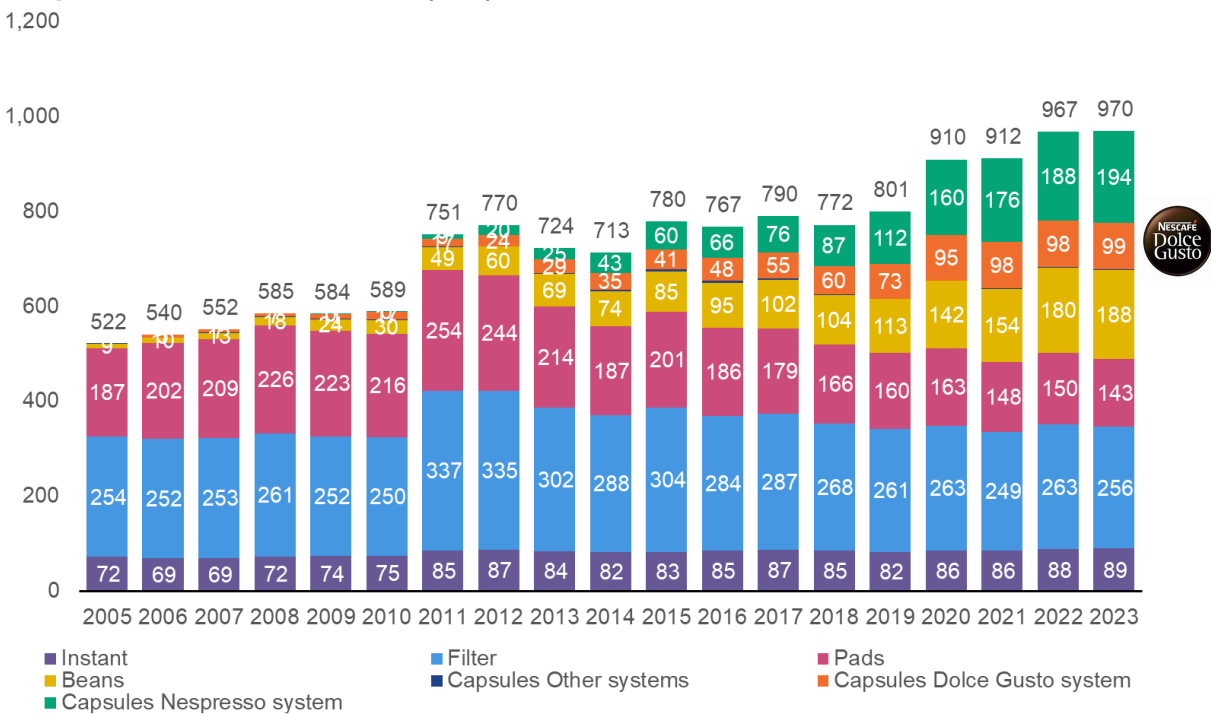
Supermarkets - Price per Cup - Coffee



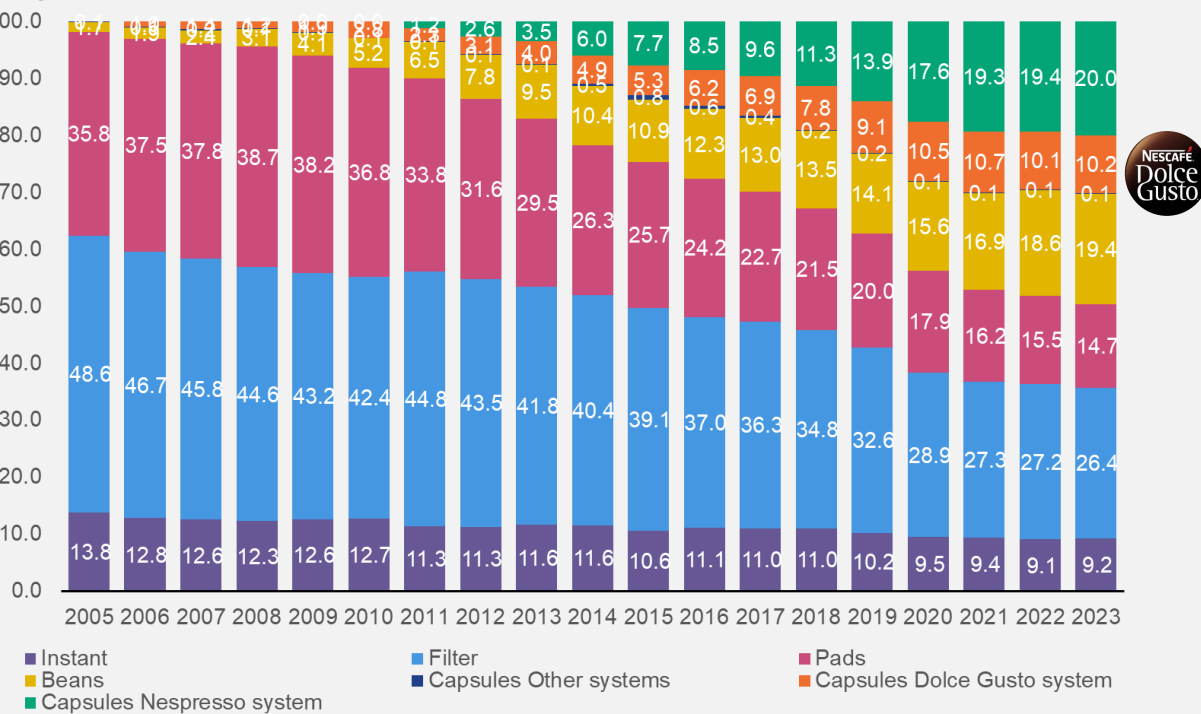
NL Supermarkets – Coffee value growth driven by capsules & beans

Value in Euro (Mln)

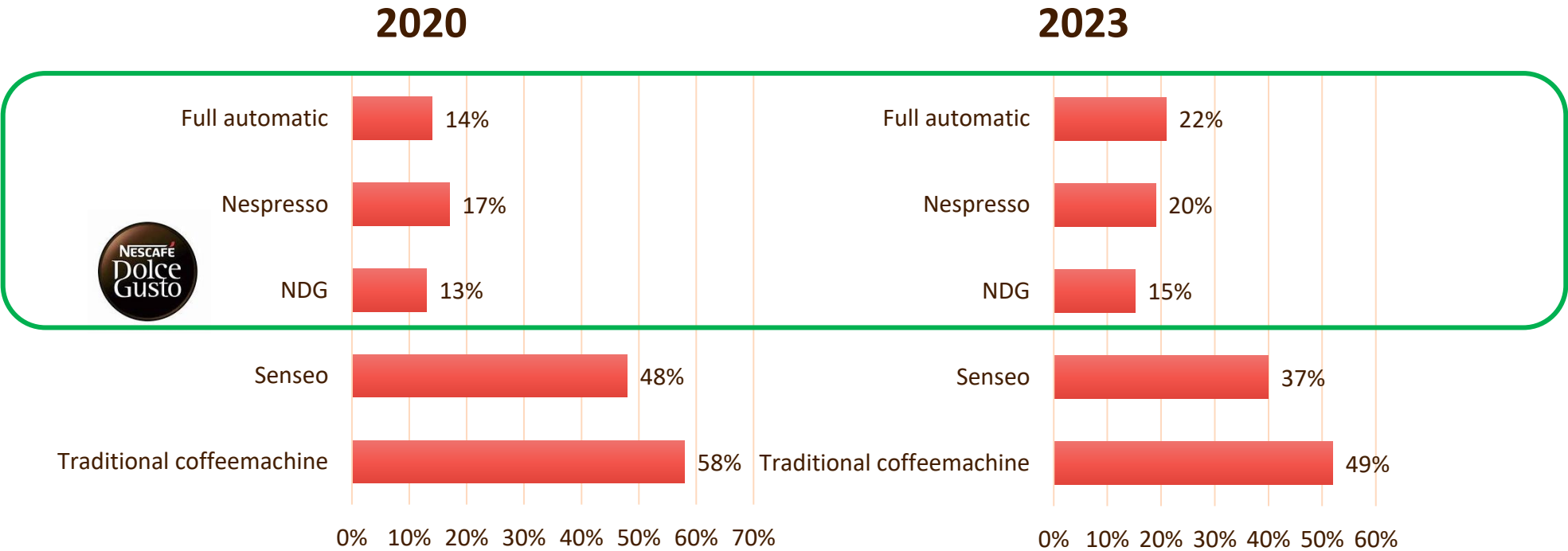
Supermarkets - Value in Euro (Mln) - Coffee



Supermarkets - Value Share - Coffee



Shift towards capsules & beans has been driven by increased machine ownership of capsules machines & full automats



*GFK MACHINE OWNERSHIP 2020 - 2023

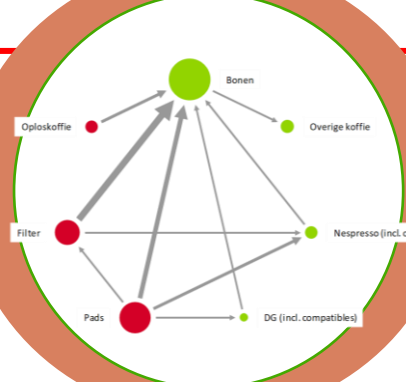
The coffee category has been growing in value over the last years, but faces some important challenges



**VOLUME PER SHOPPER /
FREQUENCY &
PENETRATION ARE
DECLINING**



REDUCING #CUPS
-7,7%
-860.000.000
(‘23 vs ‘17)



**INCREASING
CONSUMPTION
OF BEANS WITH
LOWER PRICE PER
CUP (7 CENTS)**



**SUSTAINABILITY
PERCEPTION OF
CAPSULES**



- RISK FOR ALL STAKEHOLDERS -



NESCAFÉ DOLCE GUSTO IN THE NETHERLANDS



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Coffee shop trends continue to shape consumers' in-home expectations

INDULGENCE



COLD



ALTERNATIVE MILKS



ORIGINS



SUSTAINABILITY



ROASTING



EDUCATION



HAND BREWED





Our ambition

Bring the excitement of
coffee shop culture into
every home.

DRIVE
value creation
FURTHER.

Our coffee shop
at home

MENU



BLACK COFFEE

RISTRETTO ARDENZA
RISTRETTO BARISTA
RICORÉ BLACK
ESPRESSO
ESPRESSO INTENSO
LUNGO
LUNGO INTENSO
AMERICANO
GRANDE
AMERICANO INTENSO /
GRANDE INTENSO

GRANDE MILD
BUONDI
BUONDI INTENSO
SICAL
BONKA
DALLMAYR (Prodomo, Crema D'oro
& Crema D'oro Intenso)
ZOEAGS (Espresso, Mollberg &
Morning Blend)

MISCELA ROBUSTA



LATTE (ONE CAPSULE)

CORTADO
FLAT WHITE / SICAL MEIA DE LEITE / CAL DELICATO
CAFÉ AU LAIT
CAFÉ AU LAIT INTENSO
RICORÉ AU LAIT
INCAROM

PLANT BASED LATTE

OAT CAFFÉ LATTE
ALMOND CAFFÉ LATTE
COCONUT CAFFÉ LATTE

CREAMY LATTE (TWO CAPSULES)

CAPPUCCINO
CAPPUCCINO SKINNY/UNSWEETENED
LATTE MACCHIATO
LATTE MACCHIATO CARAMEL
MOCHA
CAPPUCCINO ZOEAGS



DECAFFEINATO

ESPRESSO DECAFFEINATO
ESPRESSO INTENSO DECAFFEINATO
LUNGO DECAFFEINATO
CORTADO DECAFFEINATO
CAFÉ AU LAIT DECAFFEINATO

COFFEE +

DOUBLE CAFFEINE

CHOCOLATE

CHOCOCINO
NESQUIK
KITKAT



TEAS

MARRAKESH TEA



BLACK COFFEE DESTINATIONS

ESPRESSO MILANO
ESPRESSO NAPOLI
ESPRESSO PALERMO
ESPRESSO ROMA

AMERICAN CAFÉ MIAMI
AMERICAN CAFÉ NEW YORK



STARBUCKS

BLACK COFFEE

BLONDE ESPRESSO
ESPRESSO ROAST
VERANDA BLEND
HOUSE BLEND
SUNNY DAY BLEND

DESTINATIONS/OVER ICE

ESPRESSO COLOMBIA

LATTE

CAFFÉ LATTE

CREAMY LATTE

CAPPUCCINO
LATTE MACCHIATO
LATTE MACCHIATO CARAMEL
LATTE MACCHIATO VANILLA
TOFFEE NUT LATTE
WHITE MOCHA

NESCAFÉ® Dolce Gusto®

Target Consumer

THE TRIBES OF PRAGMATIC HEDONISTS

All those who share the philosophy that life is meant to be enjoyed. Drinking coffee and hot beverages is an important personal ritual to enjoy every day.

Experience-driven, they like to indulge in quality moments – even better when shared with like-minded people! They seize opportunities to explore, discover and experience new things, always with an open mind.

No wonder they're particularly drawn to coffee shop moments & culture.

But as they're easily swept away by the daily routines and constraints of their busy lives, they favour – and will pay for – pragmatic solutions enabling them to make their everyday more enjoyable on any occasion.



Perfectionists



Explorers



NDG is an aspirational, distinctive brand for the dutch consumer

Strong potential to further increase penetration in coming years

Strong brand awareness & consideration



Consumers applaud us for ...

- 1 Offer a wide variety of coffee blends & flavours
- 2 Are always bringing innovation to the market
- 3 Enables me to personalize my coffee
- 4 Makes me discover new ways to enjoy my coffee
- 5 Brings a coffee experience to my home

But would like to see more...

- 1 Offer a superior taste
- 2 Offer superior coffee quality
- 3 Offer coffee origins from around the world
- 4 Act to limit their environmental waste impact
- 5 Is my prepared choice for breakfast





Our mission

is to invent the future
OF **MULTI-BEVERAGE
SYSTEMS**

by designing a coffee shop
at home experience as it
should be.

Engaging locally



ACCELERATE
CAPSULE RECYCLING



Launching Recycling Association with coffee producers



both brands and private labels



Representing approximately 90% of the current coffee capsule market in the Netherlands.





**Introducing the future
of coffee shop at home.**





**After five years
in the making**



**...AND WE WILL
CONTINUE TO
DELIGHT OUR
CONSUMERS,
SHOPPERS AND
CUSTOMERS**





THANK YOU



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Q&A

