

The background of the slide is a light blue-grey color, decorated with a large number of 3D-rendered spheres in various shades of blue and purple. These spheres are scattered across the right side and top of the slide, creating a dynamic, molecular-like pattern. On the left side, there is a dark blue curved shape that serves as a backdrop for the NielsenIQ logo and the summit title.

NielsenIQ

NESCAFÉ Dolce Gusto NEO

*From consumer insights to
breakthrough innovation in coffee*

**insight
summit**
2025

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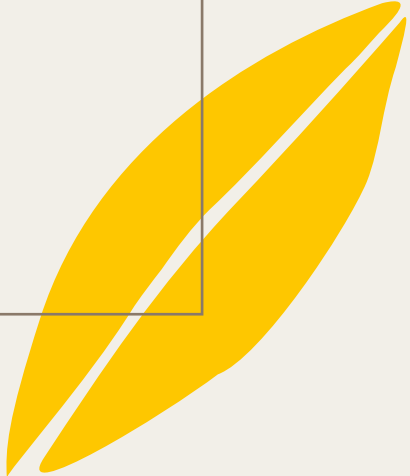


Coffee: a **unique category** that has become an indispensable part of our consumer's routine!



It's the #1 drink chosen after water!

Consumers love coffee because



Around 28% of all drinking moments is coffee



+/- 90%

Of all households have a coffeemachine.

1,7

Machines per household



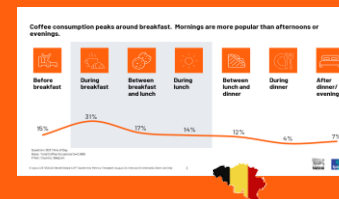
3,2

Average cups a day

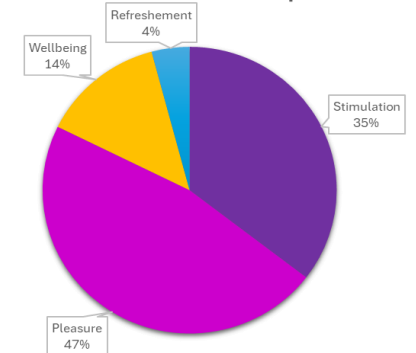


All day

Coffee is drunk throughout the day, with the consumption peak between breakfast & lunch)



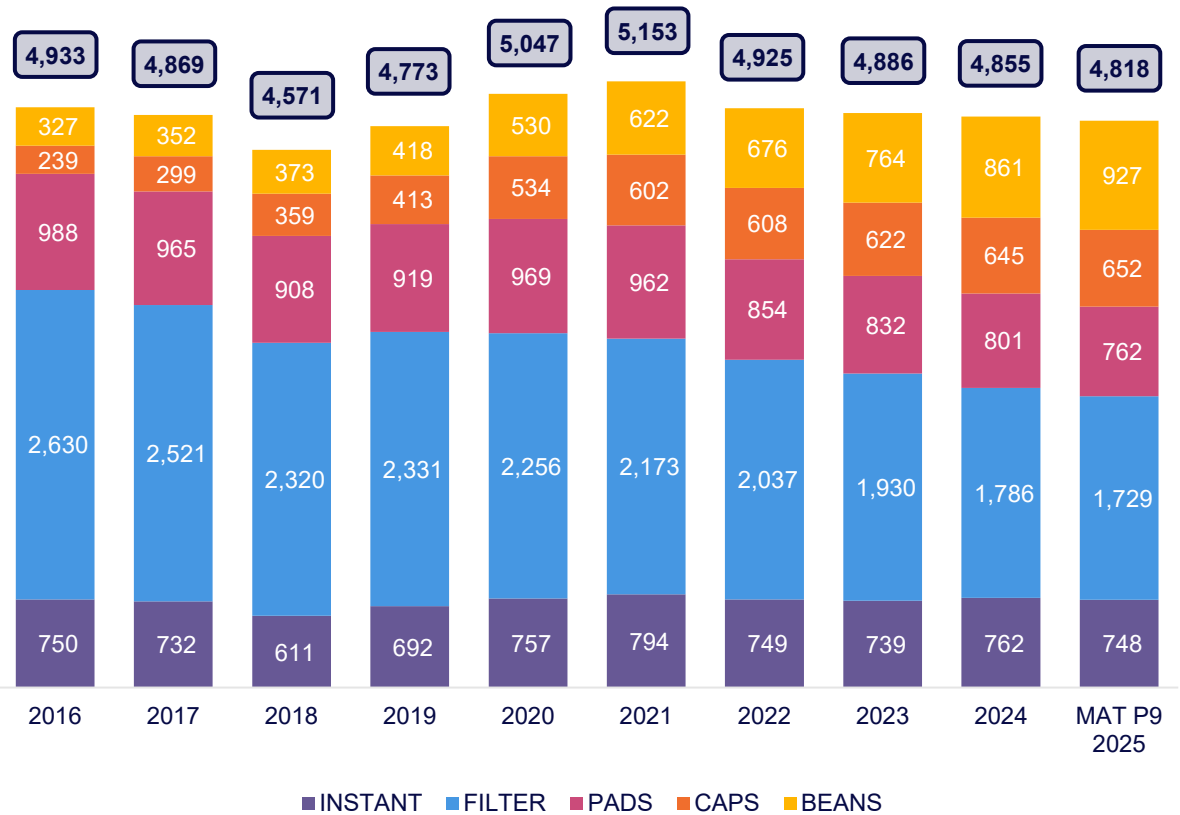
Reasons for coffee consumption BE



Coffee volume in 10 years is in slight decline...

Coffee Segments Volume in Cups (M)

Belgium – Retail In-Store – Yearly & MAT P9 2025

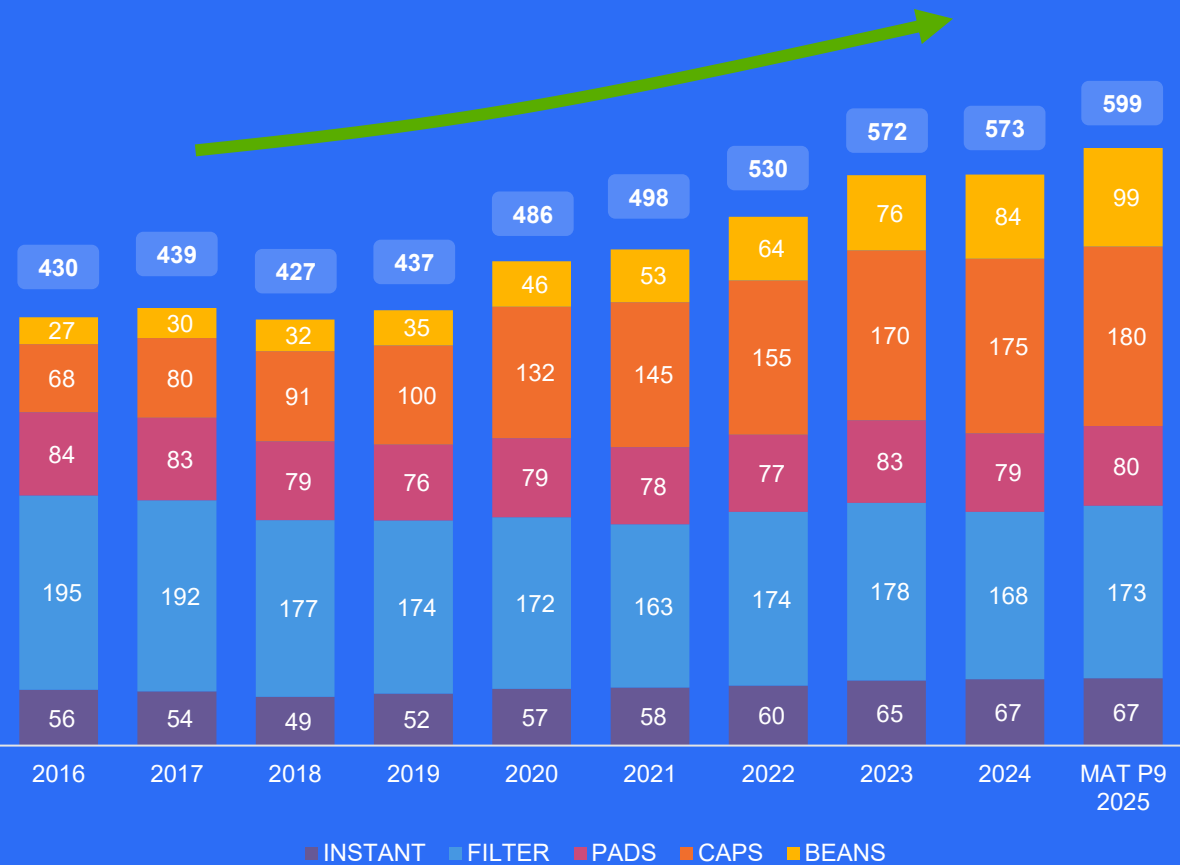


while in value it is booming

With 30% of value coming from Caps in 2025

Coffee Segments Sales Value (M €)

Belgium – Retail In-Store – Yearly & MAT P9 2025



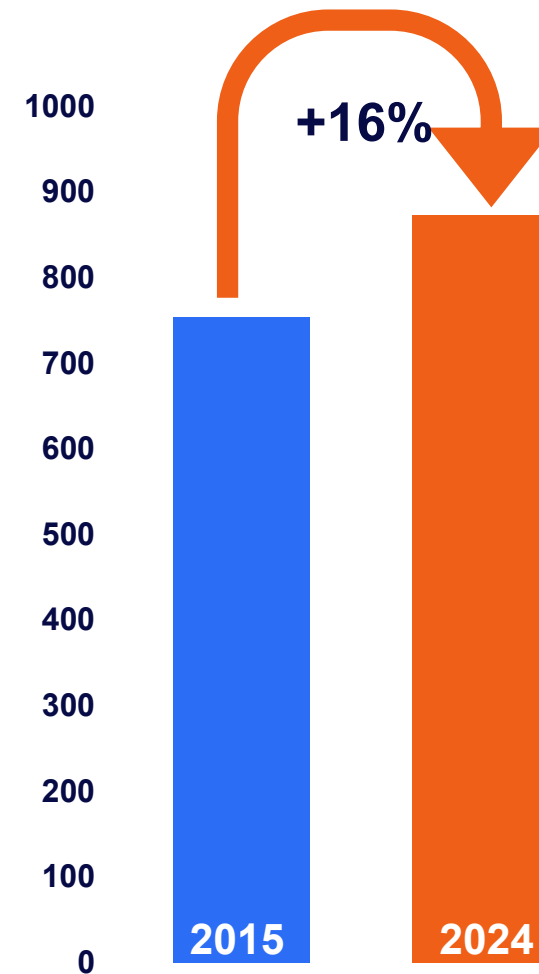
Coffee Machines
Are Brewing a
Boom with an
Average
Spend
Growth of
+57% in 10
years time

While volume only grew by 16%

Coffee Machines Sales in BE in euro
Belgium – POS – 2015 vs 2024



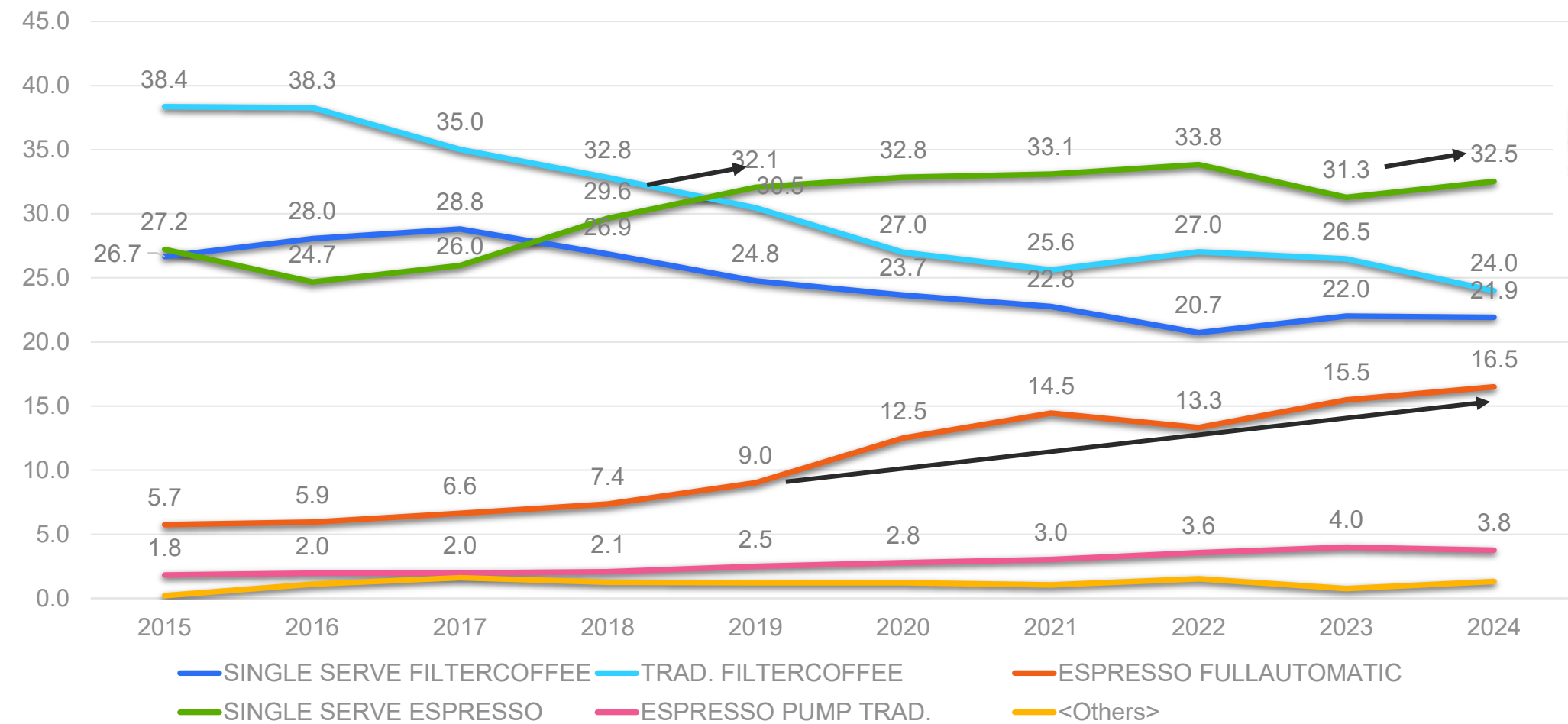
Coffee Machines Sales in BE in
volume (thousands)
Belgium – POS – 2015 vs 2024



Source: NIQ Point of Sales data

Single serve espresso takes the crown in units

Unit share type Coffee Machine



Source: NIQ Point of Sales data

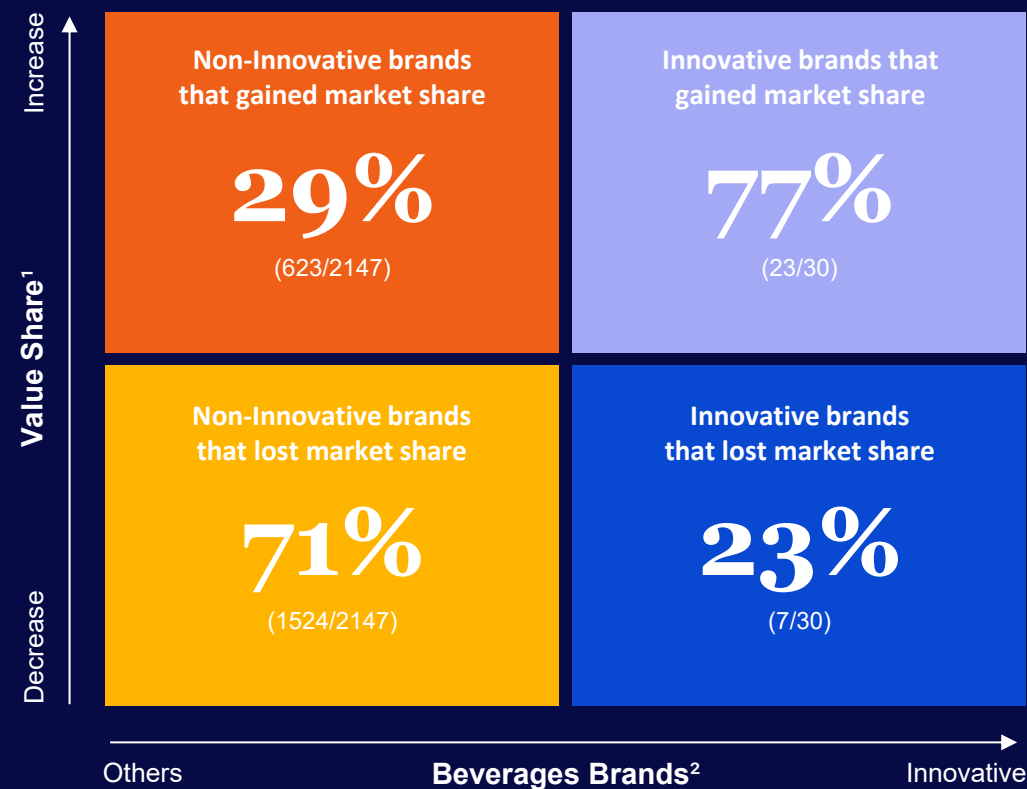
Innovation Drives Growth in Beverages

77% of Innovative Brands
Gained Market Share vs. only
29% of Non-Innovative
Brands



Value Market Shares Gains/Losses Matrix

Belgium – Retail In-Store – Beverages Brands – FY 2024 vs. 2023



Source: NIQ Belgium RMS Scantrack

¹Sales Value Share in Total Beverages (Brands WD>5 & Sales Value >50k€; FY 2024) vs. FY 2023 | ²Alcoholic Beverages & Non-Alcoholic Beverages Brands with WD>5 & Sales Value >50k€; FY 2024 | *An innovation is a new variety (WD>5 & Sales Value>50k€; FY 2024); might include relaunched



NDG IN BELGILUX



Since 15 years,
NDG is the bright side of coffee

BEYOND
LIMITS

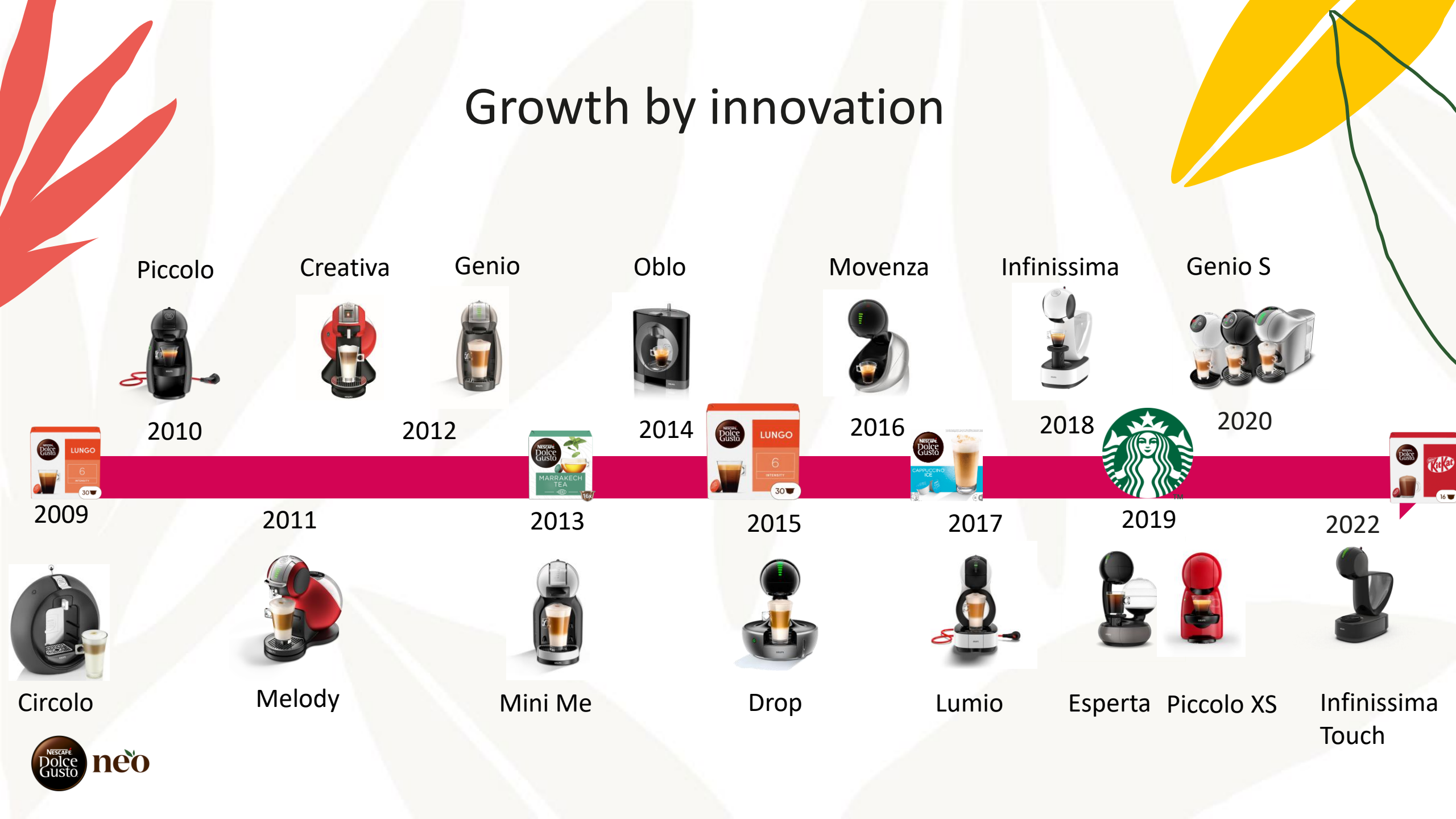
CHANGE YOUR COLORS,
CHANGE YOUR COFFEE STYLE.
NEW COLORS* ONE MACHINE, MANY POSSIBILITIES. FOR ONLY XX€.

Nescafé
Dolce Gusto

COFFEE IS NOT JUST BLACK

CATUAI
THE BRAZILIAN WAY TO SAY
VERY GOOD

Growth by innovation



In >15 years,
we have sold



3.000.000 MACHINES



135.000.000 BOXES

MENU

Espresso



Lungo & Grande



Cappuccino & Latte



Starbucks by NDG



Light & Decaf



Tea & Special.T



Chocolate



NESCAFÉ Dolce Gusto is a distinctive & meaningful brand to our consumers with 91% awareness



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 at home**



WHY LAUNCH NEO



Our consumers expect more



What consumers would like to see more...

1

Offer a superior taste

2

Offer a 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

A vibrant, abstract collage of tropical leaves in various shades of green, yellow, and pink/red, creating a layered, jungle-like effect. The leaves are of different shapes and sizes, some with natural holes, and are arranged in a dense, overlapping pattern.

**After five years
in the making**

A powerful value proposition !

01



FOR NESTLE

Why NEO

NEO brings growth potential through increased distinctiveness vs competition.

02



FOR CONSUMERS

Superior VP

- High quality coffees, impeccable foam
- Four brewing technologies, huge variety
- Paper based pods & sachets
- -20% CO2, -60% plastic content (vs. G1)
- Connected, at heart!

03



FOR CUSTOMERS & PARTNERS

Grow portioned category

Trigger transition to NEO to grow overall penetration & sustain critical mass.
Source of business: Acquisition+ Upgrade

04



FOR ALL

More to come

There are still many tools to leverage to speed up NEO access to consumers, bring excitement to the category & grow overall NDG business

Trigger the transition to NEO to grow
overall penetration of NDG

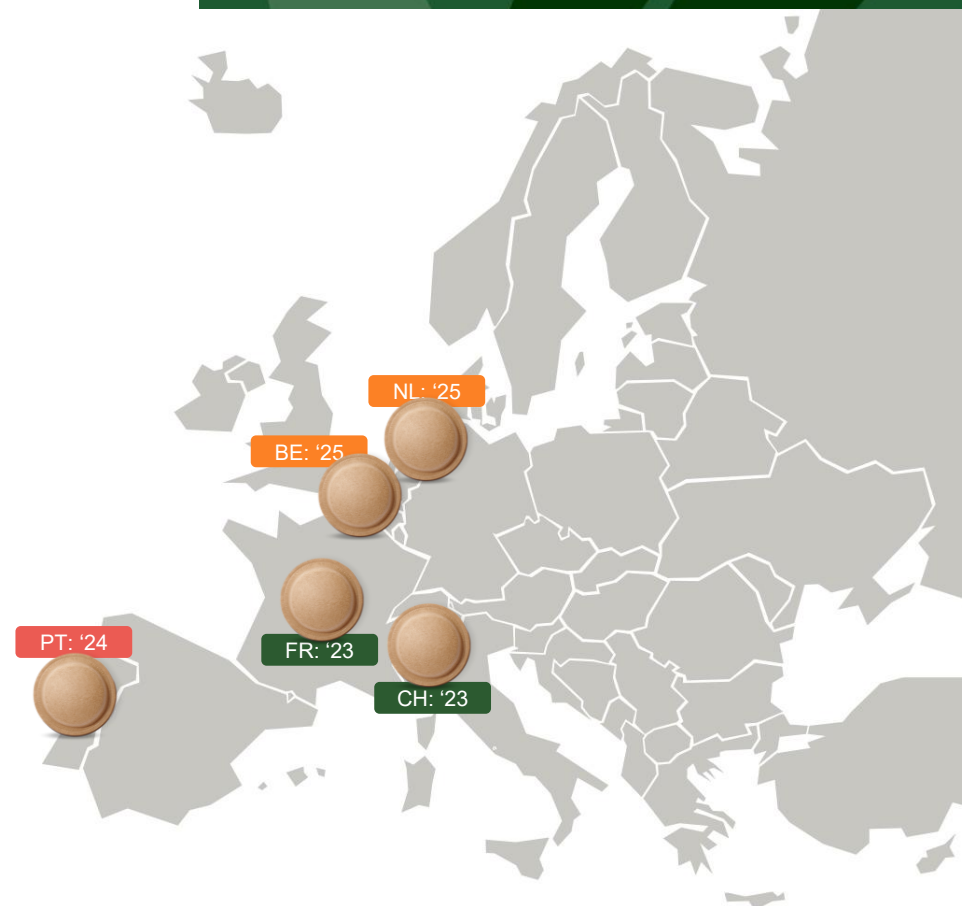
neò **UPGRADE**

NESCAFÉ DOLCE GUSTO

neò **ACQUISITION**

OTHER COFFEE SYSTEMS

NEO IN BNL: launch 08 2025



Launching 2 types of machines, both models in black and white

neò
-LATTE-

For black &
white coffee
lovers



neò
-CAFFÈ-

For black
coffee lovers





BLACK COFFEE (ESPRESSO)

ESPRESSO INTENSO
LUNGO
LUNGO DECAF



BLACK COFFEE (SLOW BREW)

GRANDE



STARBUCKS

BLACK COFFEE

BREAKFAST BLEND AMERICANO

CREAMY LATTE

LATTE MACCHIATO CARAMEL



LATTE (1 SACHET)

CAFÉ AU LAIT

CREAMY LATTE (1 POD + 1 SACHET)

CAPPUCCINO
LATTE MACCHIATO



CHOCOLATE & TEA

HOT CHOCOLATE
MARRAKESH TEA







Delight Consumers & Shoppers

Grow the Coffee Category

...for the next 15 years to come !

Thank you

