

Turkey Coffee Shop Market Analysis 2013

Allegra STRATEGIES

Copyright: Allegra Strategies Limited, October 2013

All rights reserved. No part of this publication may be reproduced or stored in a retrieval system, in any form or by any means, electrical, mechanical, photocopying or otherwise without the prior consent of the publishers. The views and forecasts presented in this report represent independent findings and conclusions drawn by Allegra Strategies. Main sources of information include published information, opinions and information shared by interviewees with Allegra Strategies during the period of study.

This report has been produced under significant time constraints to ensure that the information contained is as up-to-date as possible.

Great care has been taken to ensure that all information contained in this report is accurate, free from bias, and fully describes the latest developments in the Turkey coffee shop market, as of October 2013.

However, Allegra Strategies can accept no responsibility for any investment decision made on the basis of this information or for any omissions or inaccuracies that may be contained in this report.

This report has been produced in good faith and independently of any operator or supplier to the industry. We trust that it will be of significant value to all readers.

Allegra Strategies Limited
No 1 Northumberland Avenue, Trafalgar Square, London WC2N 5BW

Tel: +44(0)20 7691 8800 Fax: +44(0)20 7691 8810 Email: <u>info@allegra.co.uk</u> Website: www.allegra.co.uk

Registered in England No: 3645920

INTRODUCTION AND BACKGROUND	1
1.1 Objectives and Scope	2
SECTION 1 – EXECUTIVE SUMMARY	3
1.1 Executive Summary	4
SECTION 2 – TURKISH MARKET OVERVIEW	5
2.1 Country Economic Overview	6
Table 2.1 – Key Economic Data, Turkey 2013	6
Table 2.2 – Major Cities by Population, Turkey 2013	7
2.2 Market Overview	8
2.3 Key Market Players	9
2.4 Key Societal and Consumer Trends	10
2.5 Key Success Factors	11
2.6 Main Industry Challenges	12
2.7 Market Outlook	13
SECTION 3 – OPERATOR PROFILES	14
3.1 Market Share of Branded Coffee-Focused Chains	15
Table 3.1 – Branded Coffee-Focused Operators Store Numbers and Market Share, Turkey 2012-2013	15
3.2 Market Share of Branded Coffee-Focused Chains	16
Table 3.2 – Branded Food-Focused Operators Store Numbers and Market Share, Turkey 2012-2013	16
3.3 Average Coffee Beverage Selling Prices	17
Table 3.3 – Average Coffee Beverage Selling Prices, Turkey, October 2013	17
Figure 3.1 – Turkey Branded Coffee Chain Average Espresso, Cappuccino and Latte Pricing 2012-2013	17
3.4 Price Comparisons by Operator – Espresso	18
Figure 3.2 – Price of a Single Espresso by Operators in Turkey, October 2013	18
3.5 Price Comparisons by Operator – Cappuccino	19
Figure 3.3 – Price of a Medium Cappuccino by Operators in Turkey, October 2013	19

3.6 Price Comparisons by Operator – Latte	20
Figure 3.4 – Price of a Medium Latte by Operators in Turkey, October 2013	20
3.7 Competitive Landscape – Positioning Map	21
Figure 3.5 – Market Positioning for Branded Coffee Shops, Turkey 2013	21
3.8 Market Size and Growth	22
Figure 3.6 – Turkey Branded Coffee Chain Outlets, Market Size and Forecasts, 2009 -2018F	22
3.9 Key Operator Profiles	23
Caffè Nero	23
Caribou Coffee	25
Gonul Kahvesi	27
Kahve Diyari	29
Kahve Dunyasi	31
Kocatepe Kahve Evi	33
Lavazza	35
Mado Cafe	37
Ozsut	39
Pelit	41
Robert's Coffee	43
Starbucks Coffee Company	45
Tchibo	47
 SECTION 4 – EUROPEAN MARKET COMPARISON	49
4.1 Market Size by Country – Branded Coffee Shop Market	50
Figure 4.1 – Market Size by Country, October 2013	50
4.2 Fastest Growing Countries – Branded Coffee Shop Numbers	51
Table 4.1 – Branded Coffee Shop Growth by Country, 2012-2013	51

4.3 Key Economic Indicator by Country	52
Table 4.2 – Key Economic Indicator by Country, 2013	52
4.4 Growth Potential for Branded Coffee Shops	53
Figure 4.2 – EU Comparative Analysis GDP / Capita and Branded Coffee Shops / Million Capita by Country, 2013	53
4.5 VAT Rates by Country	54
Table 4.3 – Vat Rate by Country, Regular and Foodservice Rates, 2013	54
4.6 Top 20 Market Players	55
Table 4.4 – Top 20 Branded Coffee Chains Across Europe, October 2013	55
4.7 Coffee Consumption by Country	56
Figure 4.3 – Per Capita Coffee Consumption by Country, Average of Year 2003 -2012	56
4.8 Price Comparisons by Country – Single Espresso	57
Figure 4.4 – Estimated Average Price of a Single Espresso by Country, October 2012 - 2013	57
4.9 Price Comparisons by Country – Medium Cappuccino	58
Figure 4.5 – Estimated Average Price of a Medium Cappuccino by Country, October 2012 - 2013	58
4.9 Price Comparisons by Country – Medium Latte	
Figure 4.6– Estimated Average Price of a Medium Latte by Country, October 2013	59
Appendix	60
A.1 Country Abbreviations	61
Table A.1 – Country Abbreviations	61
A.2 Key Terms and Definitions	62
Table A.2 – Key Terms Used Throughout Turkey Coffee Market Analysis	62