



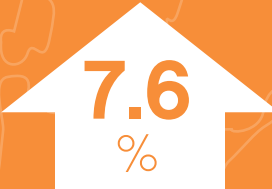
## MARKET SIZE

Total branded coffee house outlets

 **622**

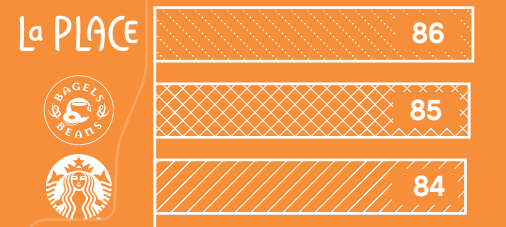
## MARKET GROWTH

Total branded coffee house outlet growth over the last 12 months

 **7.6**  
%

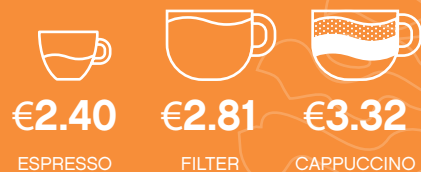
## LEADING BRANDED CHAINS

By total number of outlets



## TYPICAL PRICE


Typical price of a regular drink across major Dutch chains



## SPECIALTY COFFEE

Across the largest branded chains

**3** OF THE **5**  
MAJOR CHAINS HAVE A  
SPECIALTY COFFEE FOCUS



## COFFEE QUALITY

Consumer's take on what makes a high quality coffee

-  **GOOD TASTE**
-  **COFFEE STRENGTH**
-  **TEMPERATURE**

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