

# THE BRANDED CAFÉ MARKET DEBUT HEAT MAP

INTERNATIONAL MARKET ENTRIES OVER THE LAST 12 MONTHS

**TOP 3 COFFEE CHAINS ON THE MOVE**

**COSTA COFFEE**

**9 NEW ENTRIES** →  
USA, OMAN, MOROCCO, GEORGIA, PAKISTAN, AUSTRIA, AZERBAIJAN, UZBEKISTAN, JAPAN

**★ PRET ★**

**5 NEW ENTRIES** →  
IRELAND, KUWAIT, LUXEMBOURG, ITALY, INDIA

**% ARABICA®**

**5 NEW ENTRIES** →  
TAIWAN, SOUTH KOREA, CANADA, VIETNAM, PHILIPPINES

Number of new entries



**NORTH AMERICA**

|     |                              |
|-----|------------------------------|
| USA | Costa Coffee (UK)            |
|     | Grind (UK)                   |
|     | Coffee Fellows (Germany)     |
|     | Coco Safar (South Africa)    |
| CAN | Tealive (Malaysia)           |
|     | % Arabica (Japan)            |
|     | Paris Baguette (South Korea) |
| JAM | Krispy Kreme (US)            |

**SOUTH AMERICA**

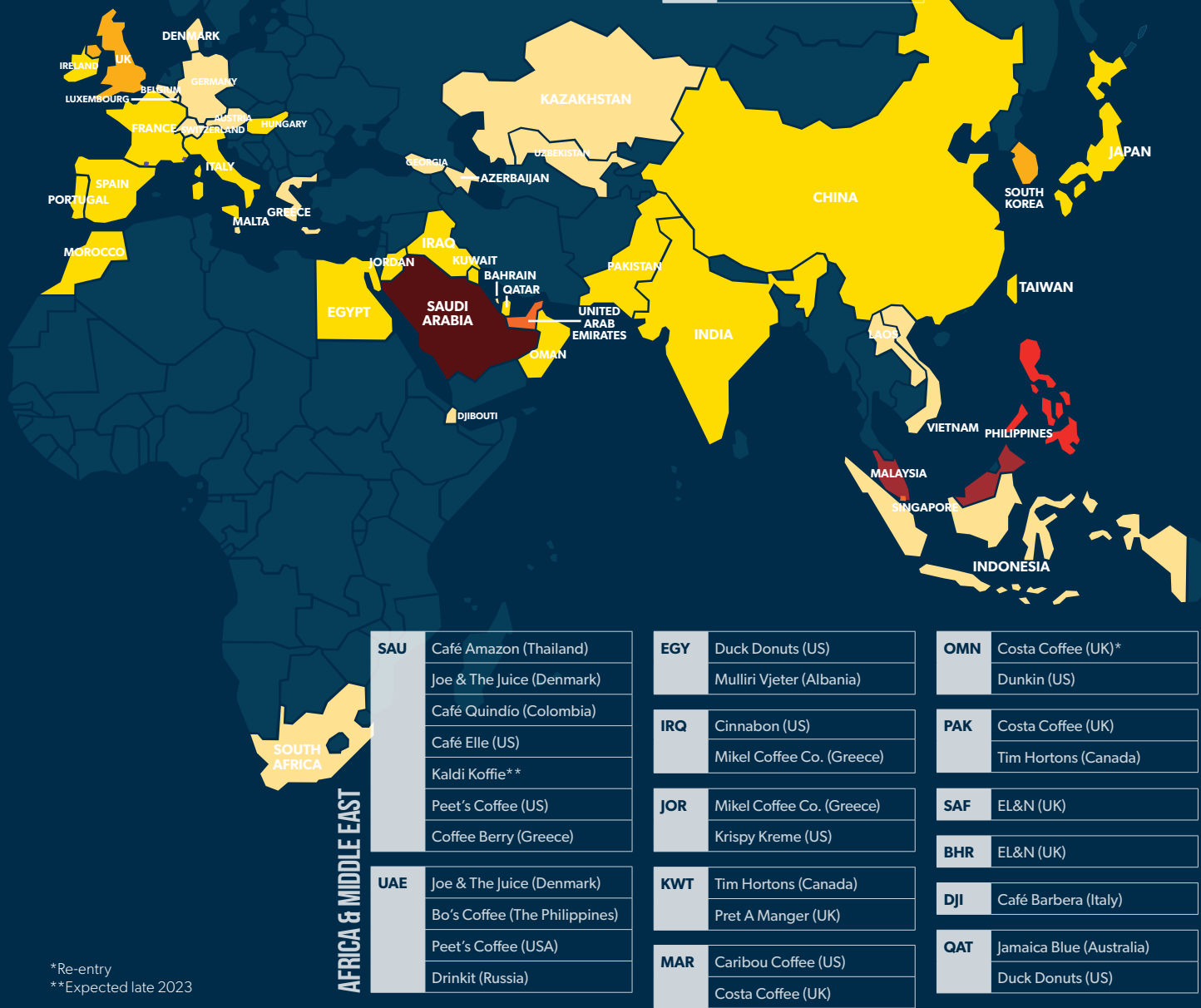
|     |                     |
|-----|---------------------|
| CHL | Krispy Kreme (US)   |
| PRY | Starbucks (US)      |
| PER | The Coffee (Brazil) |

**EUROPE**

|     |                              |
|-----|------------------------------|
| UK  | Paris Baguette (South Korea) |
|     | Roladin (Israel)             |
|     | Chun Fun How (Taiwan)        |
| IRL | Pret A Manger (UK)           |
|     | Caffè Vergnano 1882 (Italy)  |
| FRA | Gong cha (Taiwan)            |
|     | Saddle Café (UAE)            |
| BEL | Gong cha (Taiwan)            |
| LUX | Pret A Manger (UK)           |
| DNK | Waynes (Sweden)              |
| SWZ | Krispy Kreme (US)            |
| DEU | Mikel Coffee Co. (Greece)    |
| AUT | Costa Coffee (UK)            |
| PRT | Panther's Coffee (Spain)     |
|     | Gong cha (Taiwan)            |
|     | Santagloria (Spain)          |
| ESP | The Barn Berlin (Germany)    |
|     | The Miners (Czech Republic)  |
| AZE | Costa Coffee (UK)            |
| GEO | Costa Coffee (UK)            |
| GRC | 12oz (Italy)                 |
| HUN | 5 to go (Romania)            |
|     | Caffè Vergnano 1882 (Italy)  |
| MLT | Coffee Fellows (Germany)     |
| ITA | Pret A Manger (UK)           |
|     | Paul (France)                |

**ASIA**

|     |                                |
|-----|--------------------------------|
| MYS | Ralph's Coffee (USA)           |
|     | Kopi Kenangan (Indonesia)      |
|     | Paris Baguette (South Korea)   |
|     | Tanamera (Singapore)           |
|     | Bacha Coffee (Morocco)         |
|     | EL&N (UK)                      |
| SGP | Café Kitsune (France)          |
|     | Cinnabon (US)                  |
|     | Luckin Coffee (China)          |
|     | Ralph's Coffee (US)            |
| PHL | Paik's Coffee (South Korea)    |
|     | OldTown White Coffee (MYS)     |
|     | % Arabica (Japan)*             |
|     | Paris Baguette (South Korea)** |
|     | Common Man (Singapore)         |
| IND | Tim Hortons (Canada)           |
|     | Pret A Manger (UK)             |
| KOR | % Arabica (Japan)              |
|     | Terres de Café (France)        |
|     | Cotti Coffee (China)           |
| CHN | Trung Nguyen Legend (VNM)      |
|     | Bacha Coffee (Morocco)         |
| TWN | % Arabica (Japan)              |
|     | Café Kitsune (France)          |
| IDN | Komeda's Coffee (Japan)        |
| JPN | Segafredo Caffé (Italy)        |
|     | Costa Coffee (UK)              |
| KAZ | Drinkit (Russia)               |
| LAO | Starbucks (US)                 |
| UZB | Costa Coffee (UK)              |
| VNM | % Arabica (Japan)              |



**AFRICA & MIDDLE EAST**

|     |                               |
|-----|-------------------------------|
| SAU | Café Amazon (Thailand)        |
|     | Joe & The Juice (Denmark)     |
|     | Café Quindio (Colombia)       |
|     | Café Elle (US)                |
|     | Kaldi Koffie**                |
|     | Peet's Coffee (US)            |
|     | Coffee Berry (Greece)         |
| UAE | Joe & The Juice (Denmark)     |
|     | Bo's Coffee (The Philippines) |
|     | Peet's Coffee (USA)           |
|     | Drinkit (Russia)              |

|     |                           |
|-----|---------------------------|
| EGY | Duck Donuts (US)          |
|     | Mulliri Vjeter (Albania)  |
| IRQ | Cinnabon (US)             |
|     | Mikel Coffee Co. (Greece) |
| JOR | Mikel Coffee Co. (Greece) |
|     | Krispy Kreme (US)         |
| KWT | Tim Hortons (Canada)      |
|     | Pret A Manger (UK)        |
| MAR | Caribou Coffee (US)       |
|     | Costa Coffee (UK)         |

|     |                          |
|-----|--------------------------|
| OMN | Costa Coffee (UK)*       |
|     | Dunkin (US)              |
| PAK | Costa Coffee (UK)        |
|     | Tim Hortons (Canada)     |
| SAF | EL&N (UK)                |
| BHR | EL&N (UK)                |
| DJI | Café Barbera (Italy)     |
| QAT | Jamaica Blue (Australia) |
|     | Duck Donuts (US)         |

\*Re-entry  
\*\*Expected late 2023