Insight Survey is a South African B2B market research company with more than 10 years experience, focusing on business-to-business (B2B) and industry market research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer B2B and Industry market research solutions to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal or external environment.

At Insight Survey, we believe in the advantage marketing research gives business leaders to fully understand their industry, facilitate business development strategy, highlight company performance, and nurture industry growth.
Our bespoke Competitive Business Intelligence Research can help give you the edge in a global marketplace, empowering your business to overcome industry challenges quickly and effectively, and enabling you to realise your potential and achieve your vision.

From strategic overviews of your business’s competitive environment through to specific competitor profiles, our customized Competitive Intelligence Research is designed to meet your unique needs.

OUR RESEARCH SOLUTIONS

- Competitor Pricing Research
- Store Visits and Store Checks
- Competitor Interviews
- Customer Interviews
- Company Website Analysis
- Governmental Held Records
Our Food and Beverages Industry Landscape reports have been purchased by global and South African companies:

- Burger King
- Coca-Cola
- FairTrade
- Hungry Lion
- KFC
- McDonald's
- Nando's
- Nature's Choice
- Nestle
- Pioneer Foods
- Premier
- RCL Foods
- Roman's Pizza
- Taste Holdings
- Vital
The South African Coffee Industry Landscape Report (128 pages) provides a dynamic synthesis of industry research, examining the local and global Coffee industry from a uniquely holistic perspective, with detailed insights into the entire value chain – from manufacturing to retailing, market size trends, industry trends, industry drivers & challenges, competitor and pricing analysis.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Coffee Industry Section:
- What are the current market dynamics (production, consumption, pricing) of the Global Coffee industry?
- What are the Global Coffee industry trends, drivers, and restraints?

For the South African Coffee Industry Section:
- What are the current market dynamics (market environment, production, consumption, pricing, importing, sustainability) of the SA Coffee industry?
- Who are the key manufacturing players and importers/roasters in the SA Coffee industry?
- What are the South African industry trends, drivers and challenges?

For the South African Retail and Pricing Analysis Section:
- Who are the key retail players (retail outlets, independents and supermarkets) in the SA Coffee industry?
- What are the prices of the most frequently purchased Coffee (OOH, instant, ground beans, capsules) across SA retail outlets?
Global coffee consumption reached 157.4 million 60kg bags in the 2016/17 period, which is an increase of 1% over the 2015/16 period, as can be seen from the graph below.

This is slightly lower than the production total of 158.9 million 60kg bags in the same time period. However, it is possible that some of this change can be attributed to increases in pipeline stocks which are not officially recorded, rather than actual consumption.

This difference could put pressure on coffee pricing, but as the deficit is not as pronounced as the previous year, the impact should be relatively small.

The table below shows the top 5 coffee consuming countries for the 2016/17 period and number of bags consumed and percentage change from 2015/16 to 2016/17.

Europe is predicted to remain a highly lucrative market for coffee with European cultural influences driving consumption of coffee-based beverages globally.
South Africa’s green coffee imports have experienced a decline from 600,000 60kg bags imported in 2016 to 520,000 60 kg bags imported in 2017.

### South Africa Green Coffee Imports By Year: 2011-2017 (in thousand 60kg bags)

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<td>Growth Rate</td>
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### Changing Lifestyles Offering Benefits to Coffee Industry

- South African consumers are constantly changing their lifestyles according to global trends. In the Coffee industry specifically, there has been an increase in popularity of coffee shops amongst millennials in South Africa.

- In addition to this, coffee pod machines have become part of SA consumers' everyday lifestyles. As it is only fresh ground coffee used within the pods, consumers can have a cup of fresh coffee in less time without added sugar or creamer.

### Coffee On-the-Go: More Popular Than Ever

- Coffee franchise outlets are situated, and now more visible than ever, at the service station forecourts on every major road route in South Africa, ensuring that the South African coffee drinker can get their daily caffeine fix while traveling.

### Changing Market Demands and Demographics

- There is increasing demand for better quality coffee made from ethically sourced products, as well as growth in Café culture in South Africa.

- Also, the general profile of the coffee drinker in South Africa has been changing, with an increase in young, black consumers making coffee their beverage of choice.

**Source:** Business Report Lifestyle

**Image Source:** Millennials Coffeetogo Pixabay
AVI Limited manages and promotes many of SA’s leading and best-loved brands. The company is listed on the JSE in the Food Products sector and is centered on the FMCG market.

- AVI’s extensive brand portfolio includes more than 50 brands across several industries.
- According to the AVI 2017 Integrated Annual Report, revenue increased by 8.2% up to R13.2 billion while operating profit rose 10.7% to R2.4 billion in 2017.
- Entyce Beverages’ (Part of AVI) revenue increased by 9.8% to R3.8 billion due to higher selling prices offset by lower sales volumes. The coffee division of Entyce recorded an increase of 11.8%.
- Entyce’s selling and administration costs are well contained due to lower marketing and incentive expenditure, as well as improved efficiency as a result of the organisational restructuring.
- Entyce’s premium category was boosted by growth of the specialty Hug in a Mug instant cappuccino product falling under the House of Coffees brand.
- The CIRO Full Service Coffee Company’s (Part of Entyce) revenue for 2017 grew by 5.6% as a result of selling price inflation while being offset by an increase in raw material costs and an ultra-competitive market.

AVI COFE BRANDS/ PRODUCTS

- Frisco
- Douwe Egberts
- Cafitesse
- House of Coffees

- Koffiehuis
- Ciro
- Lavazza

Source: AVI Integrated Annual Report 2017; CIRO Full Service Coffee Company

Image Source: Colourbox; AVI; CIRO; Frisco
Dunkin’ Donuts South Africa recorded earnings of R18.5 million in 2017, an increase of 499% when compared to 2016 (R3.7 million).

- In January 2016, Grand Parade Investments acquired the South African master franchise license for Dunkin’ Donuts and Baskin-Robbins from the Dunkin’ Brands group.
- During October 2016, Dunkin’ Donuts made its entry into the South African market and opened its first restaurant in Cape Town, South Africa.
- By January 2018, Dunkin’ Donuts had grown significantly with 11 stores located in the Western Cape. Another 7 stores are scheduled to open their doors in Gauteng by June 2018, where they will attempt to compete directly with Krispy Kreme.
- Dunkin’ Donuts offers a wide range of hot, cold, and iced beverages in small, medium, and large portion sizes. Along with the beverages, Dunkin’ Donuts offers bakery goods, such as donuts, and a variety of other dishes on their menu.
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