

# COFFEE SHOP GUIDE

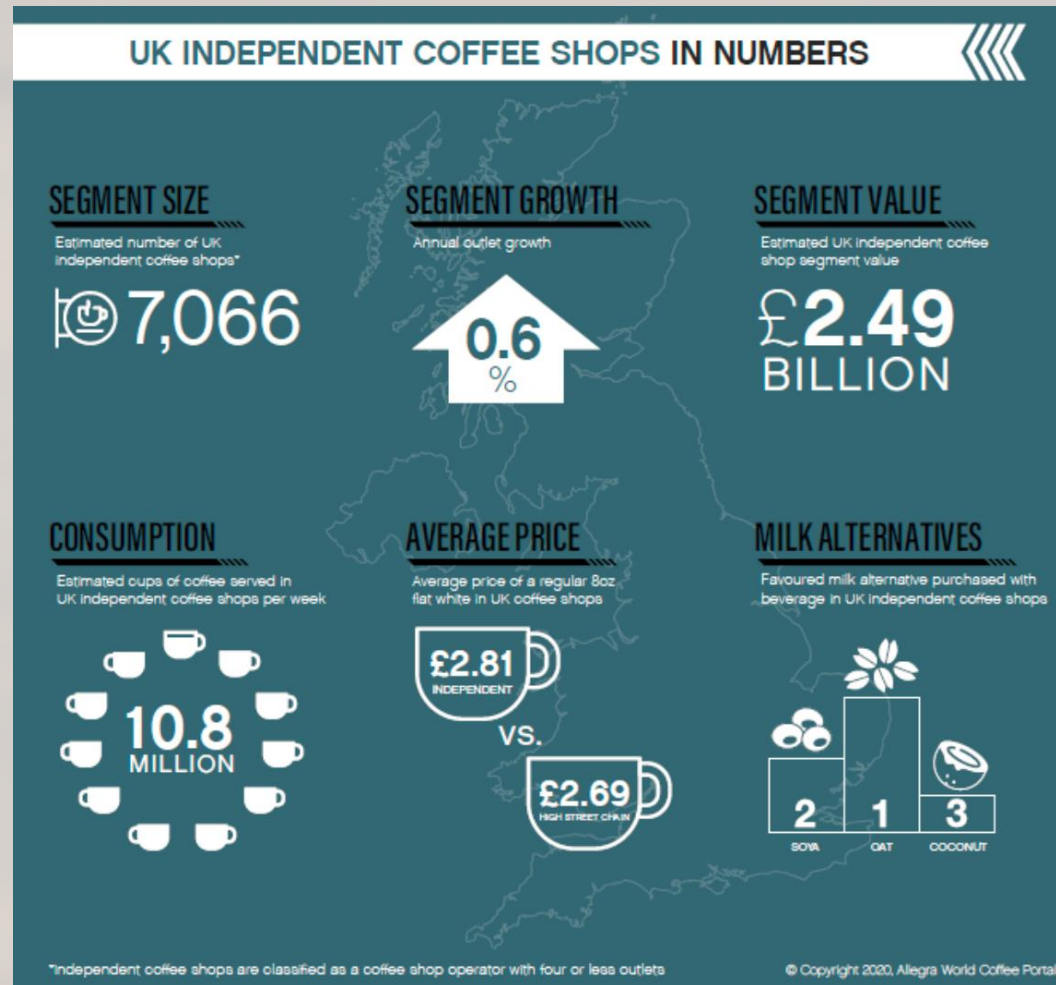


# Insight - Allegra

The results of the Coronavirus Impact Study reveal the difficult situation that UK coffee shops are currently facing and the uncertainty about the future of their businesses. Below are some of the key findings of the report, which is free to download [here](#).

- **92%** of coffee shop operators temporarily closed all (**82%**) or some (**10%**) venues
- **87%** said the coronavirus pandemic has negatively impacted their business
- The majority of coffee shop operators changed their trading model or patterns in response to the pandemic: **70%** switched to take-away only; **67%** reduced trading hours; **57%** reduced their menu; **53%** switched to cashless payment only
- 3 out of 4 participants believe that the pandemic will majorly impact their business in the short term and **35%** believe it will take two or more years for business operations to return to normal
- 8 out of 10 owners are worried about future business viability, while other concerns include immediate cashflow (**65%**) and inability to pay rent (**50%**)
- The majority of participants believe that long-term social distancing (**76%**) and lower customer footfall (**72%**) will be the key changes in customer behaviour as a result of this crisis, leading to further pressure on their businesses

# The UK Marketplace



## Allegra THE RISE OF INDEPENDENTS UK 2020

The Rise of Independents UK 2020 is Allegra World Coffee Portal's annual focus on the UK's innovative, diverse and competitive independent coffee shop segment. The report features market sizing, growth forecasts, key influential operator profiling and consumer trend analysis.

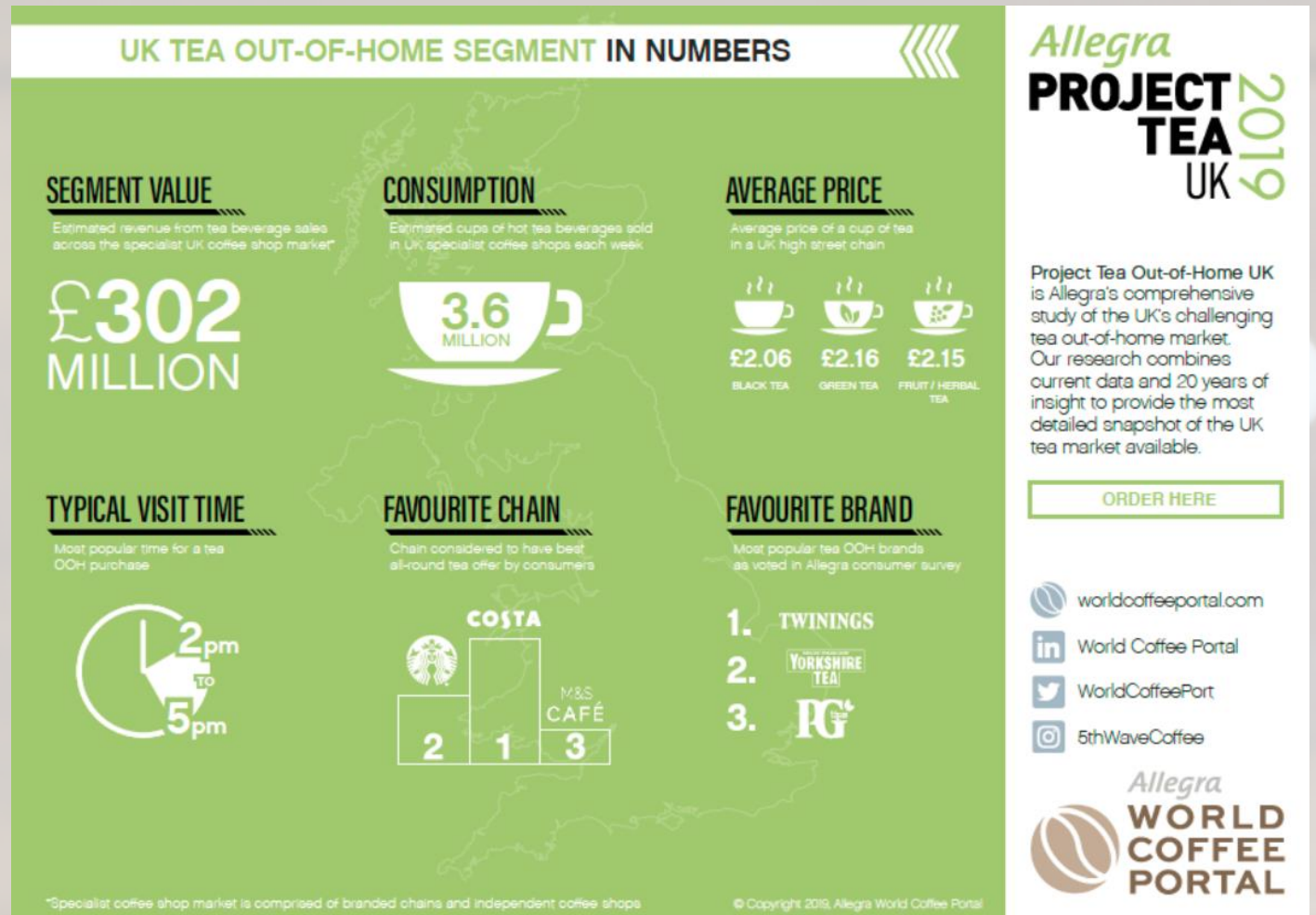
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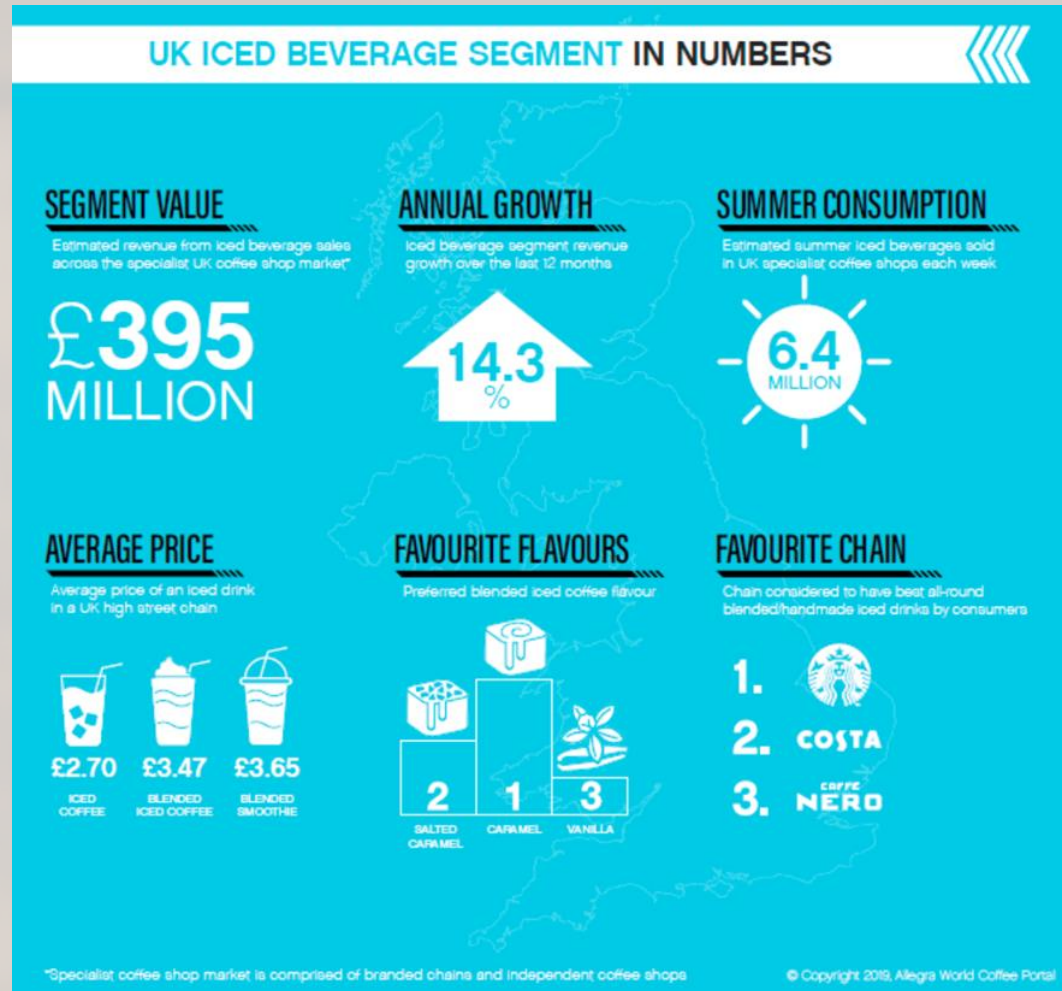
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# The UK Marketplace



# The UK Marketplace



## Allegra PROJECT ICED 2019 UK

Project Iced Beverages UK is Allegra's extensive study of the UK's fast-growing iced and blended beverage market. Our research reveals market size and growth projections, branded food and coffee-focused developments, key price comparisons and more.

- [worldcoffeeportal.com](http://worldcoffeeportal.com)
- [World Coffee Portal](#)
- [WorldCoffeePort](#)
- [5thWaveCoffee](#)

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# IGD identify three key emerging food to go trends

IGD has commented on the food-to-go market in its quarterly Shopper Vista report. Introducing the idea of it being a 'mission' to find something to eat, Shopper Vista says 'the third national lockdown resulted in a decrease in food-to-go missions, but not to the extent of the first, and interestingly, evening food-to-go missions became more common than lunch. There was a 3% increase in dedicated 'food-to-go' missions between February and March 2021 which is a reassuring indicator for the industry. But shopper behaviours have shifted significantly during the pandemic and as a result, we are seeing key trends emerge that operators, retailers and suppliers should consider.'

The three key trends are:

## **1. Evening food-to-go is on the rise**

In the most recent lockdown, evening food-to-go missions reached their highest recorded level, becoming more common than lunch missions. This could be a result of the growth of delivery services, which have made a wider range of products more accessible. It also raises the question of whether shoppers will continue to choose food-to-go in the evenings, as restrictions ease and the out of home sector reopens.

## **2. Demand for hot food-to-go options is increasing**

Hot food-to-go options are becoming more popular. Demand for a range of food-to-go choices which are less portable could increase as levels of working from home are expected to be elevated compared to pre-pandemic times.

## **3. Convenience is influencing purchasing choices**

Demand for convenience and new service expectations have been set, particularly amongst younger shoppers. 40% of 18-24 year-olds state that having the ability to pre-order is an important consideration in deciding where to purchase food-to-go.

The report also reveals that food-to-go purchases continue to be driven by a typical 9-5 weekday working pattern, despite more people working from home. This behaviour could continue to be supported by a 'suburban shift' as food-to-go businesses shift away from city centres into suburban areas to follow the consumer. A lower density footfall compared to city centres and transport hubs, combined with different peak times and shopper profiles, will mean new operating models will evolve to meet consumer needs.



## Brakes Spring 2021 – Market Update

### Limited production and high demand has increased dairy prices



The EU Dairy category index tracked by Mintec showed an increase of 3.9% in the first quarter of 2021. Europe experienced a slow start to its milk production season as cold weather and Siberian winds limited output. This resulted in a production decline for the main categories of milk products.

Butter was particularly impacted with EU commodity prices rising 17% in Q1. With increased activity from the re-opening of the foodservice sector now adding additional demand to the market, prices could rise further.

The average price of European milk rose by 3% over the winter with prices supported by strong export demand from Asia and Middle Eastern markets.

China is the world's largest importer of milk powders, butter and cheese and they are expected to maintain strong demand in 2021 keeping EU dairy prices high. Further afield, there are many growing markets for dairy products, particularly from the Middle East which has witnessed the most gains since the start of the pandemic.

Eyes now turn to the spring flush in the UK. After some concerns caused by cold weather early in 2021, production is currently forecasted to be broadly inline with 2020's output. This could result in softer milk prices over the summer.



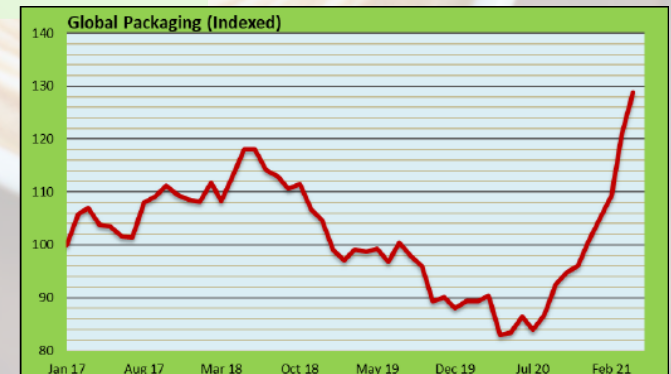
## Increasing commodity prices impact packaging costs

Mintec's global packaging composite index rose for the 11<sup>th</sup> consecutive month in April as input costs continue to rise. EU plastic prices have been surging in 2021 with producers reporting that stocks are exhausted. There is little support from export markets with US manufacturers struggling to fulfil domestic orders. As such, European suppliers are proposing triple digit increases for some materials. PET which is used for drink bottles is likely to be in particular demand over the summer.

There is also growing consumption of cardboard in 2021 with high demand from food and e-commerce sectors driving up prices. Reports suggest that suppliers are operating at maximum capacity, however delivery times are continuing to increase. Supply for brown kraftliner is estimated to be particularly scarce. Finally, spring is typically the time of year when paper mills slow production to allow for scheduled maintenance and there are concerns this could result in added disruption to supply.

Packaging costs are expected to remain high through 2021 as economic activity increases. Furthermore the ongoing shortage of shipping containers creates an additional challenge for suppliers aiming increase production. These higher costs will impact many delivered food products in the UK.

## Market activity spring 21...














# We have the range and suppliers to support your coffee shop...

From the beans to the machines...From display ware to disposables  
Talk to us and our partners JDE & Café Direct



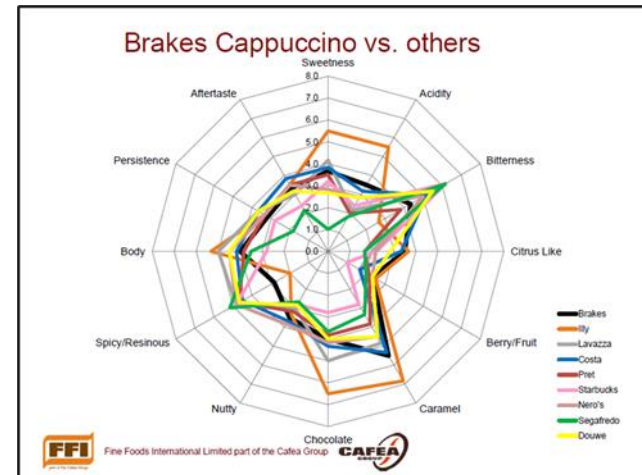
# Brakes range of coffee beans...

 <p><b>A 132737</b> Douwe Egberts Barista Edition Rich Espresso Beans Full case quantity: 8</p>	 <p><b>A 132738</b> Douwe Egberts Barista Edition Signature Espresso Beans Full case quantity: 8</p>	 <p><b>A 86153</b> Arriba 100% Arabica Coffee Beans Full case quantity: 1</p>	 <p><b>A 88818</b> Arriba Fairtrade Espresso Beans Full case quantity: 1</p>	 <p><b>A 84527</b> Kenco Sustainable Development Medium Dark Roast Coffee Beans Full case quantity: 8</p>	 <p><b>A 84526</b> Kenco Italia Dark Roast Coffee Beans 1kg Full case quantity: 8</p>	 <p><b>A 87634</b> Cafédirect Fairtrade Original Espresso Beans Full case quantity: 1</p>	 <p><b>A 116340</b> Beyers Decaffeinated Coffee Beans Full case quantity: 8</p>	 <p><b>A 122881</b> Douwe Egberts UTZ Italia Espresso coffee Beans 1kg Full case quantity: 1</p>
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Coffee is very emotive and is based on how you process the bean, market the beans and story – credentials, flavour profiles etc.

It's important to choose the right bean and blend for your customer base.

Our Arriba Fairtrade bean is a great all rounder and stands up well against some of the leading brands in the marketplace.



## Hot beverages – some of our range

88818	Arriba Fairtrade Espresso Beans	
86149	Arriba Medium Roast & Ground Filter Coffee (3 pint)	
1791	Nescafe GOLD BLEND Instant Coffee 750g	
116340	Beyers Decaffeinated Coffee Beans	
24761	Tate & Lyle Fairtrade White Sugar Sticks 2.5kg	
24762	Tate & Lyle Fairtrade Demerara Sugar Sticks 2.5kg	
86418	Plastico Wooden Coffee Sticks 190mm	
118424	Twining's Everyday Tea	
121879	Twining's Favourites Variety Pack - Enveloped and Tagged Tea Bags	
27546	Yorkshire Tea 1 Cup Teabags	
129443	Champion Soya Milk Jiggers	
70324	Brakes Fresh Semi Skimmed Milk	
129401	Oatly Oat Drink Whole Chilled 1 Litre	
70219	Brakes Fresh Whole Milk	
121204	Galaxy Instant Hot Chocolate 1kg	
131424	Thornton's Luxury Hot Chocolate	
131425	Thornton's Luxury Hot Chocolate	
134236	Twining's Honey Rooibos	NEW
134237	Twining's Mango Pineapple	NEW
134238	Twining's Revive Raspberry	NEW





# Breakfast...

67598	Delifrance Wrapped All Butter Pain Au Chocolat	40 x 50g
67597	Delifrance Wrapped All Butter Croissant	32 x 40g
30149	La Boulangerie Ready to Bake Straight All Butter Croissant	50 x 60g
30294	La Boulangerie Ready to Bake Pain au Chocolat	48 x 75g
33040	La Boulangerie Round Crumpets	6 x 6 x 50g
30006	La Boulangerie 5" Pre-sliced Teacakes	48 x 93g



## Hot Breakfast

70296	Brakes Cooked Back Bacon	1 x 500g
121143	Halal Cooked Turkey Bacon Rashers	1 x 1kg
3559	Brakes Cooked Pork Sausage Eights	48 x 49g
31849	Brakes Cooked Cumberland Pork Sausage	1 x 28-32
31848	Brakes Cooked Pork Sausage Sixes	1 x 28-32
112443	Brakes Free Range Cooked Scrambled Eggs	4 x 1kg
74006	Brakes Cooked Scrambled Eggs	2 x 1kg
120248	Brakes Baked Beans in Tomato Sauce	6 x 840g
186	Brakes Baked Beans in Tomato Sauce	1 x 2.62kg
30319	La Boulangerie Fully Baked Soft White Batch Rolls	36 x 56g
62616	Bacon Panini (wrapped)	1x24
62617	Sausage Panini (wrapped)	1x24



# Breakfast...

109631	Kellogg's Cereal to Go Crunchy Nut 45g
109630	Kellogg's Cereal to Go Corn Flakes 35g
89428	Kellogg's Frosties Original Cereal 35g
89431	Kellogg's Fruit 'n Fibre Cereal 45g
107121	Fresh Semi Skimmed Milk
85041	Oatburst Plain Instant Porridge
84742	Oatburst Apple & Blueberry Instant Porridge
109637	Quaker Oat So Simple Banana & Strawberry Porridge Pot 58g
109638	Quaker Oat So Simple Summer Berries Porridge Pot 58g
28677	Quaker Oat So Simple Apple & Blueberry Porridge Pot 57g
28678	Quaker Oat So Simple Golden Syrup Porridge Pot 57g
28676	Quaker Oat So Simple Original Porridge Pot 45g
111265	Quaker Cuppa Porridge Sachets 44.8g
109258	Innocent Super Smoothie Energise 300ml
84326	Innocent Smoothie Strawberries & Bananas 250ml
15626	Müller Healthy Balance Smooth Strawberry Yogurt
15627	Müller Healthy Balance Smooth Peach Yogurt
70932	Fresh Fruit Salad
70931	Fresh Exotic Fruit Salad
112663	Classic Fruit Salad Pot
74539	Del Monte Mango Sliced Fruit Bags
74540	Del Monte Pineapple Sliced Fruit Bags



# Confectionery & Snacks...

123474	KitKat 4 Finger Milk Chocolate Bar 41.5g	24 x 41.5g
123472	Polo Extra Strong Sugar free Tube	32 x 33.4g
127016	Boka Bar Chocomallow	24 x 30g
127726	McVitie's Jaffa Cakes Nibbles Grab Bag 39g	20 x 39g
130502	Nakd Coffee & Walnut Fruit & Nut Bars 35g	18 x 35g
130503	Nakd Salted Caramel Fruit & Nut Bar 35G	18 x 35g
119715	Soreen Malt Lunchbox Loaf 30g	30 x 30g
120170	Boka Strawberry Cereal Bar 30g	24 x 30g
120171	Boka Apple Cinnamon Cereal Bar 30g	24 x 30g
120172	Boka Caramel Cereal Bar 30g	24 x 30g
112774	Burts Lightly Salted Lentil Waves 20g	1 x 16
112775	Burts Lentil Waves Sour Cream & Chive 20g	1 x 16
110011	Belvita Breakfast Honey and Nuts with Choc Chips	20 x 50g
26197	getbuzzing Mixed Berries Nut Free Flapjack	1 x 24
122378	Quaker Porridge To Go Mixed Berries Bar	12 x 55g
122377	Quaker Porridge To Go Golden Syrup Bar	12 x 55g
132330	Metcalfe's Rice Cakes Chocolate	16 x 34g
125979	Metcalfe's Rice Cakes Yoghurt	16 x 16g
114760	Walkers Quavers Cheese Snacks 20g	32 x 20g
104378	PROPERCORN Sweet & Salty Popcorn 30g	24 x 30g
104380	PROPERCORN Lightly Sea Salted Popcorn 20g	24 x 20g





# Cakes – great impulse lines...

34333	La Boulangerie Double Belgian Chocolate Chunk Cookies	30 x 76g
34334	White Belgian Chocolate Chunk & Raspberry Cookies	30 x 72g
113599	La Boulangerie Sultana Sweet Scone Pucks	1 x 24
113598	La Boulangerie Cheese Scone Pucks	1 x 24
4657	La Boulangerie Double Chocolate Muffins	24 x 105g
33537	La Boulangerie Blueberry Crumble Tulip Muffin	24 x 126g
4659	La Boulangerie Blueberry Muffins	24 x 105g
4104	La Boulangerie American Style Muffins	48 x 75g
34246	La Boulangerie Victoria Sponge Tulip Muffin	24 x 130g
111627	La Boulangerie Mini Lemon Loaf Cake	1 x 18
89519	La Boulangerie Gluten Free Genoa Cake Slice	1 x 100
104547	We Love Cake Cranberry and Pecan Flapjacks	1 x 18
111629	La Boulangerie Millionaire's Shortbread Slice	1 x 18
111631	Brakes Butter Flapjack	1 x 18
128846	Honeybuns Gluten Free & Vegan Millionaire's Slice	40 x 64g
128847	Honeybuns Gluten Free & Vegan Dark Chocolate Brownie	40 x 50g
128848	Honeybuns Gluten Free Lemon & Ginger Shortbread	40 x 64g
128849	Honeybuns Gluten Free Fruit Flapjack	40 x 56g
130432	La Boulangerie Gluten Free Carrot Cake Slice	20 x 72g
130433	La Boulangerie Gluten Free Millionaire's Shortbread Slice	1 x 25
104548	We Love Cake Cherry Bakewell Tarts	1 x 28



# Snacks...

26332	Brakes Sweet Biscuit Assortment	1 x 2kg
118256	Crawford's Minipacks 6 Varieties (3 pack)	1 x 100
26796	Border 100 Luxury Mini Packs 5 Varieties	2 x 100
122924	Meredith & Drew 100 Mini Packs 4 Varieties	4 x 25
89018	McVitie's The Original 20 Jaffa Cakes	1 x 20
100087	McVitie's Jaffa Cakes Original	12 x 122g
112927	Raisins & Sultanas	60 x 25g
119715	Soreen Malt Lunchbox Loaf 30g	30 x 30g
127578	Meredith & Drew Oat Flapjack	100 x 26g
470173	Walkers Sultana & Cherry Cake Slice	60 x 45g
116173	Eat Natural Protein Bar	12 x 45g
110012	Belvita Duo Crunch Strawberry and Live Yogurt	18 x 50.6g
110011	Belvita Honey and Nuts with Choc Chips	20 x 50g
35490	Alpen Bars Strawberry & Yogurt	24 x 29g
108981	Nestlé Big Biscuit Box	1 x 1.6kg
1090	McVitie's Penguin Original Chocolate Biscuits	1 x 48
85718	Cadbury Snack Shortcake Chocolate Biscuit	36 x 40g
85080	Brontë Trip Chocolate Giant Cookie	18 x 65g
25092	Café Brontë Double Chocolate Chip Dunking Bars	2 x 30g x 24
25033	Café Brontë Oat & Raisin Cookie	48 x 30g



# Crisps & Snacks...

114760	Walkers Quavers Cheese Snacks 20g	32 x 20g
21420	Walkers Ready Salted Crisps 32.5g	48 x 32.5g
21421	Walkers Cheese & Onion Crisps 32.5g	48 x 32.5g
28987	McCoy's The Real McCoy's Flame Grilled Steak Ridge Cut Potato Crisps 47.5g	36 x 47.5g
21422	Walkers Salt & Vinegar Crisps 32.5g	48 x 32.5g
28988	McCoy's The Real McCoy's Salt & Malt Vinegar Flavour Ridge Cut Potato Crisps 47.5g	36 x 47.5g
89586	Walkers Baked Cheese & Onion Snacks 37.5g	32 x 37.5g
89584	Walkers Baked Sea Salt Snack 37.5g	32 x 37.5g
104378	PROPERCORN Sweet & Salty Popcorn 30g	24 x 30g
104380	PROPERCORN Lightly Sea Salted Popcorn 20g	24 x 20g
26719	Real Hand cooked Sea Salt Potato Crisps 35g	48 x 35g
26720	Real Hand cooked Sea Salt & Malt Vinegar Flavour Potato Crisps 35g	48 x 35g
26711	Real Hand cooked Strong Cheese & Onion Flavour Potato Crisps 35g	48 x 35g
114762	Walkers Wotsits Really Cheesy Snacks 22.5g	32 x 22.5g
100135	Jacob's Mini Cheddars Handy pack Original	44 x 35g
110658	Pom Bear Original	1 x 36
129247	Brit Crisp Co Salt & Vin Crisps 26x40g	1x26
129248	Brit Crisp Co Cheese & Onion 26x40g	1x26
129246	Brit Crisp Co Sea Salt Crisps 26x40g	1x26
129245	Brit Crisp Company S/Salt Blk Pep 26x40g	1x26
118848	Pipers Crisps Cheddar & Onion 24x40g	1x24
118844	Pipers Crisps Anglesey Sea Salt 24x40g	1x24
118846	Pipers Crisps Cider Vinegar	1x24
133834	Popchips Veg Vibes Sea Salt & Balsamic Vinegar Crisps 23g	24 x 23g
133835	Popchips Veg Vibes Sriracha Crisps NEW	24 x 23g



# Insight - Allegra

123367	Honeybuns Vegan GF Cinder Toffee Brownie Traybake
123366	Honeybuns Vegan GF Chocolate Pecan Caramel Traybake
121161	Brakes Vegan & Gluten Free Chocolate & Coconut Tart
123224	Brakes Vegan & Gluten Free Chocolate Orange Dessert
123053	Brakes Vegan & Gluten Free Blackcurrant Dessert
125224	Perfectly Baked Vegan Banana Bread Tray cake
125227	Perfectly Baked Vegan Apple Pie
127340	Brake Vegan American Style Pancake
127344	Brakes Vegan Carrot & Pistachio Trav cake
114262	La Boulangerie 9" Gluten Free Sub Rolls Mixed Case, White & Multigrain
114263	La Boulangerie Gluten Free Round Rolls, White & Multigrain
114266	La Boulangerie Gluten Free Mini Rolls Mixed Case, White & Multigrain
114264	La Boulangerie 4" Gluten Free Burger Bun
114268	La Boulangerie Gluten Free Sultana Scones
114271	La Boulangerie Gluten Free White Sliced Loaf
114272	La Boulangerie Gluten Free Multigrain Loaf
105509	B Free 11" Tortilla Wraps
105507	B Free 9" Tortilla Wraps
112019	Genius Seeded Single Roll
127308	Genius Brioche Burger Bun
134125	Gluten Free Mini Blueberry Muffins NEW
134126	Gluten Free Mini Chocolate Muffins NEW



# Afternoon tea favourites...

128699	Mini Meringue White Chocolate & Raspberry	40x15g
129225	Mini Meringue Passion Fruit	40x15g
129464	Vegan Brownie	2x15
129102	Raspberry & White Chocolate Blondie	1x12
121170	Vegan Salted caramel cake	1x14
127169	Rainbow drip cake	1x12
113791	Hummingbird Big Cake	1x12
105234	Big Pink Cake	1x16
113792	Big Red Velvet Cake	1x12
113788	Big Victoria Sponge	1x12
121356	Big Earl Grey & Berry cake	1x12
120555	Mini Chocolate Cakes	1x20
114808	Coffee & Walnut Cake	1x14
4150	Passion Cake	1x16
127164	Mini Carrot Cake	1x30
127170	Vegan Salted caramel Cake	1x14
130078	Macarons Les Classique's	1x36
33724	French Macaroon Selection	1x72
32440	Mini Strawberry & Cream Scones	1x48
113600	Plain Sweet Scone Pucks RTB	1x24



