



CRAFT CHOCOLATE, SPECIALITY COFFEE AND
CHOCOLATE DJS

BERLIN APRIL 2018



COCOA RUNNERS






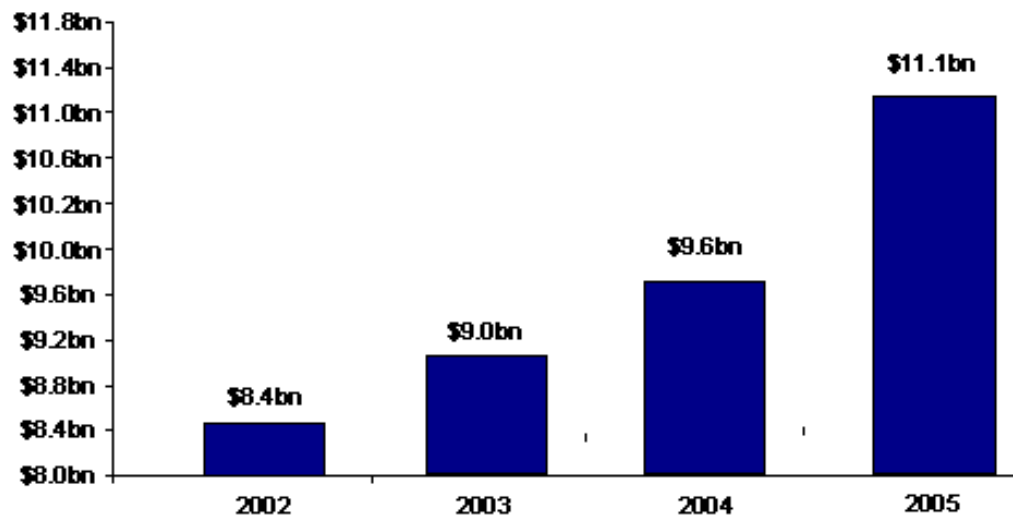
SPECIALTY COFFEE

U.S

Coffee Industry – Large and Growing Market

% drinking specialty coffee daily

-  \$22 billion market in the U.S.
-  85% of coffee is consumed at home
-  Coffeehouses Account for 69% of Specialty Coffee Sales



Specialty Coffee Experiencing Double-Digit Growth

Source: Specialty Coffee Association of America, National Coffee Association.



COCOA RUNNERS



SIMILARITIES, DIFFERENCES AND OPPORTUNITIES ... SPECIALITY COFFEE AND CRAFT CHOCOLATE

SOME SIMILARITIES

- Beans ... fermentation, drying, roasting, harvests, micro-lots, etc.
- Direct trade, fair trade, environment, transparency, etc.
- Price premiums ...
- ... price erosion, commodification and Amazon
- Need for advice and curation
- Importance of “immersive” experience (but relatively few chocolate makers can do this .. few cafes, etc.)

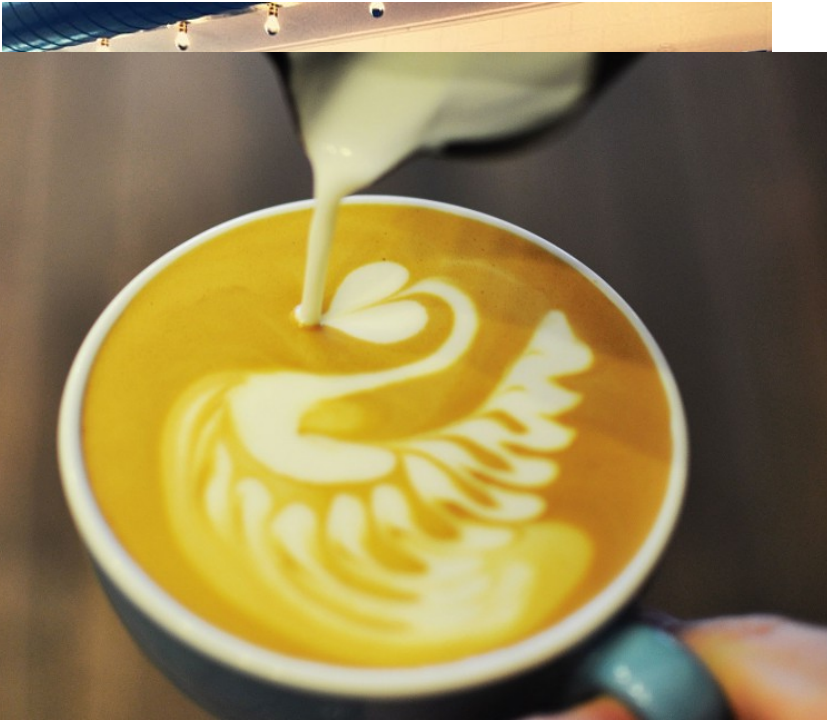
SOME DIFFERENCES

- Penetration (~1% versus 15%+?)
- Ingredient versus standalone product
- Planned purchase (and need) versus “unconscious”
- Out of home / in home (office) experience
- Barista/Roaster versus finished product
- Habits and upgrading

UPGRADING VERSUS CREATING HABITS

With speciality coffee you upgrade your familiar “habit” (and need)

- Morning joe
- Visit to coffee store



Chocolate isn't really a substitute for e.g., the sugar rush of mid-afternoon confectionery



C O C O A R U N N E R S



ECOMMERCE IS TRANSACTIONAL AND SEARCH DRIVEN

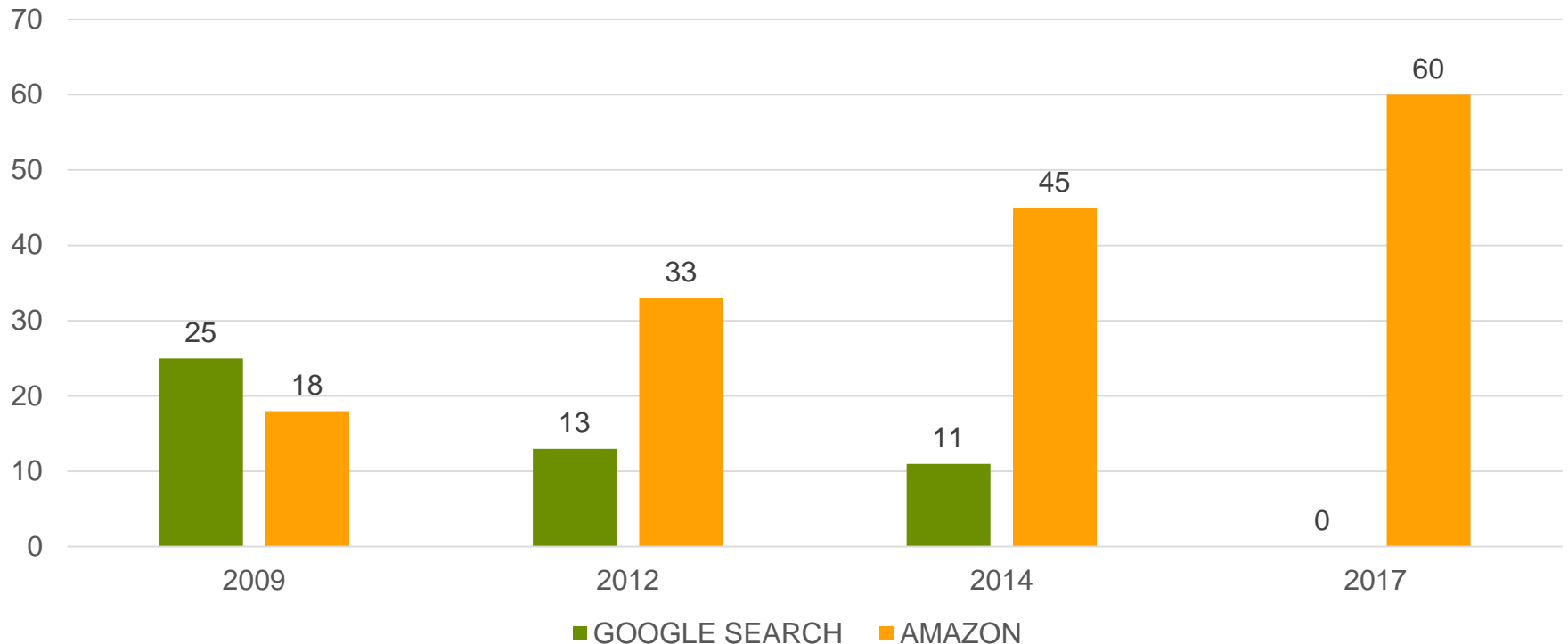


C O C O A R U N N E R S



AND INCREASINGLY A ONE HORSE RACE

WHERE DO CUSTOMERS START THEIR ONLINE PURCHASE FOR PRODUCTS?



Source: New York Times, WSJ, Forrester and Comscore

COCOA RUNNERS



PRICE COMMODITISATION

Grocery Best Sellers Baking Snacks Coffee, Tea & Beverages International Gifts Sweets & Chocolate Wine & Spirits Subscribe & Save

Back to search results for "cornflakes"



Other Sellers on Amazon

Price + Delivery	Condition	Seller Information	Delivery	Buying Options
£2.29 (€0.46 / 100 g) + £3.25 UK delivery	New	British Corner Shop ★★★★★ 96% positive over the past 12 months. (5,623 total ratings)	<ul style="list-style-type: none">In stock.Dispatched from United Kingdom.International & domestic delivery rates and return policy.	Add to Basket or Sign in to turn on 1-Click
£7.10 (€1.42 / 100 g) FREE Delivery	New	Supplies Fastlines ★★★★★ 89% positive over the past 12 months. (298 total ratings)	<ul style="list-style-type: none">In stock. Is usually dispatched within 3 - 4 working days.Dispatched from United Kingdom.Expedited delivery available.International & domestic delivery rates and return policy.	Add to Basket or Sign in to turn on 1-Click
£7.20 (€1.44 / 100 g) FREE Delivery	New	Zorba Online Store ★★★★★ 92% positive over the past 12 months. (26 total ratings)	<ul style="list-style-type: none">In stock. Is usually dispatched within 2 - 3 working days.Dispatched from United Kingdom.International & domestic delivery rates and return policy.	Add to Basket or Sign in to turn on 1-Click
£3.81 (€0.76 / 100 g) + £3.89 UK delivery	New	British ★★★★★ 91% positive over the past 12 months. (658 total ratings)	<ul style="list-style-type: none">In stock. Is usually dispatched within 3 - 4 working days.Dispatched from United Kingdom.Expedited delivery available.International & domestic delivery rates and return policy.	Add to Basket or Sign in to turn on 1-Click
£3.99 (€0.80 / 100 g) + £3.99 UK delivery	New	cooking marvellous. ★★★★★ 95% positive over the past 12 months. (19,482 total ratings)	<ul style="list-style-type: none">In stock. Is usually dispatched within 4 - 5 working days.Dispatched from United Kingdom.International & domestic delivery rates and return policy.	Add to Basket or Sign in to turn on 1-Click
£13.97 (€2.79 / 100 g) + £1.24 UK delivery	New	ProPharm ★★★★★ 87% positive over the past 12 months. (635 total ratings)	<ul style="list-style-type: none">In stock.Expedited delivery available.International & domestic delivery rates and return policy.	Add to Basket or Sign in to turn on 1-Click





Lindt Lindor Milk Chocolate Truffles With a Smooth Melting Centre 200g (Pack of 2)

by Lindt

★★★★★ 727 customer reviews

Flavour Name: **Milk Chocolate**

Milk Chocolate

Coconut Truffles

Dark Chocolate

Milk Orange

Strawberry and Cream

Hazelnut

White Chocolate

Assorted Chocolate

Lowest offer for each

Size: **200g (Pack of 2)**

50 g (Pack of 14)

200 g (Pack of 2)

200g (Pack of 2)

337 g (Pack of 2)

600 g

Lowest offer for each

Refine by [Clear all](#)

Delivery

☒ prime

☐ Free delivery

Condition

☐ New

Price + Delivery	Condition	Seller Information	Delivery
£10.99 (£27.48 / kg) ✓prime	New	SHOP 4 LESS ★★★★★ 98% positive over the past 12 months. (8,455 total ratings)	FULFILLED BY AMAZON <ul style="list-style-type: none">In stock.+0.00 Premium ShippingNominated Day DeliveryDelivery rates and return policy
£10.99 (£27.48 / kg) FREE Delivery	New	Isca Trading ★★★★★ 89% positive over the past 12 months. (2,112 total ratings)	<ul style="list-style-type: none">In stock.Dispatched from United KingdomDelivery rates and return policy
£11.29 (£28.23 / kg) FREE Delivery	New	The Sweet Pot ★★★★★ 97% positive over the past 12 months. (27,972 total ratings)	<ul style="list-style-type: none">In stock.Dispatched from United KingdomDelivery rates and return policy
£9.00 (£22.50 / kg) + £4.16 UK delivery	New	CRAIGIE ON LINE ★★★★★ 94% positive over the past 12 months. (1,747 total ratings)	<ul style="list-style-type: none">In stock.Dispatched from United KingdomDelivery rates and return policy
£9.44 (£23.60 / kg) + £3.79 UK delivery	New	British Essentials ★★★★★ 89% positive over the past 12 months. (3,810 total ratings)	<ul style="list-style-type: none">In stock. Is usually dispatched within 24 hoursDispatched from United KingdomDelivery rates and return policy
£13.45 (£33.63 / kg) FREE Delivery	New	Wildflower Trading Ltd ★★★★★ 97% positive over the past 12 months. (956 total ratings)	<ul style="list-style-type: none">In stock.Dispatched from United KingdomDelivery rates and return policy
£13.49 (£33.73 / kg) FREE Delivery	New	E.U. Xtrees ★★★★★ 98% positive over the past 12 months. (30,443 total ratings)	<ul style="list-style-type: none">In stock.Dispatched from United KingdomDelivery rates and return policy
£13.99 (£34.98 / kg) FREE Delivery	New	Click&deliver ★★★★★ 71% positive over the past 12 months. (7 total ratings)	<ul style="list-style-type: none">In stock.Dispatched from United KingdomDelivery rates and return policy
£14.99 (£37.48 / kg) FREE Delivery	New	Best With quality ★★★★★ 95% positive over the past 12 months. (1,714 total ratings)	<ul style="list-style-type: none">In stock.Dispatched from United KingdomDelivery rates and return policy
£15.99 (£39.98 / kg) FREE Delivery	New	TKGIFTS ★★★★★ 96% positive over the past 12 months. (1,262 total ratings)	<ul style="list-style-type: none">In stock.Dispatched from United KingdomDelivery rates and return policy



CURATED, BESPOKE PRODUCTS

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prime

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prime music
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Department

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Hello London, meet Treasure Truck

[Learn more](#)

[Back to search results for "cocoa runners"](#)



Cocoa Runners 100% Madagascan Cocoa, Dark Chocolate Box - A luxury selection of sugar free chocolate bars - Perfect Gift FREE UK DELIVERY

by [Cocoa Runners](#)



15 customer reviews | 4 answered questions

Amazon's Choice for "cocoa runners"

Price: **£27.45** ✓prime

In stock.

Want it delivered by tomorrow, 21 Feb.? Order within 2 hrs 6 mins and choose One-Day Delivery at checkout. [Details](#)

Sold by [Cocoa Runners](#) and Fulfilled by Amazon. Gift-wrap available.

Note: This item is eligible for [click and collect](#). [Details](#)

1 new from **£27.45**

- Included in this stunning collection are four full-sized beautiful artisan 100% cacao dark chocolate bars from Bertil Akesson, Pralus, Chocolat Madagascar and Menakao.
- These bars are made from the highest quality cacao - and never contain palm oil or vegetable fats. A totally premium experience.
- Our box is letter box friendly - carefully designed to fit through any letter box that is more than 185mm wide, 30mm high and 220mm long, and is packed in an outer protective envelope

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Quantity: 1

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CHOCOLATE RETAIL



WINE RETAILING

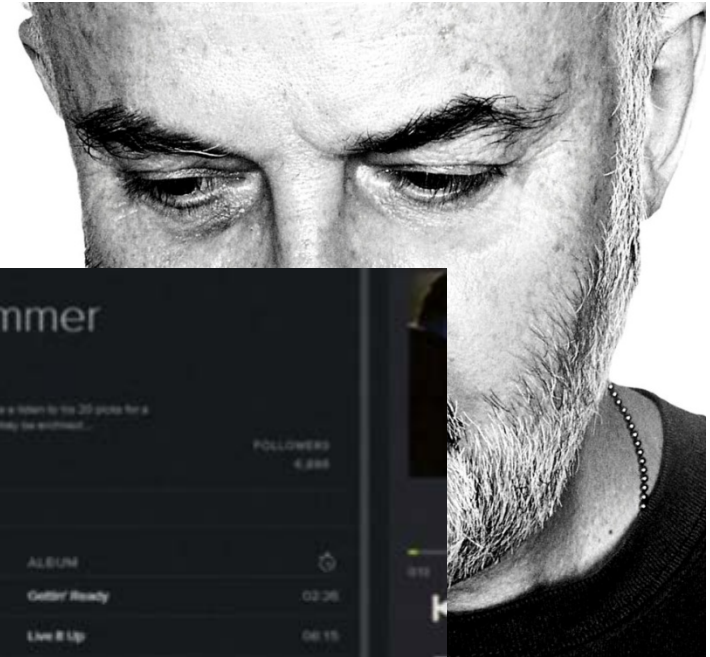
- 42 seconds (super market)
- 11 seconds (convenience store)
- Factors
 - End cap offer
 - What price
 - What colour
 - Have I heard of it?



COCOA RUNNERS



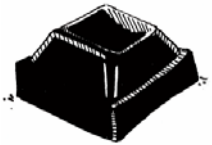
MUSIC, RADIO AND DJS



COCOA RUNNERS



CHOCOLATE PLAYLISTS – CREATED BY, AND SOLD BY, BARISTAS



DARK



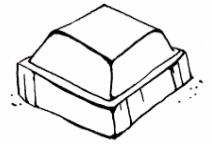
100%
Berry
Smokey
Citrus
Earthy
Indulgent



MILK



Dark
Classic
Alternative



WHITE



Classic
Toasted
Alternative



INCLUSIONS







Nibs
Textured
Flavoured

COCOA RUNNERS



DECISION TREES AND SUPPORT

COCOA RUNNERS

TYPE ?	FLAVOUR	SUGGESTED BARS	DESCRIPTION
 DARK	100 % Intense Berry Smokey Citrus Earthy Indulgent	Menakao - 100% Akesson's - Madagascar 75% or Chocolate Tree - Madagascar 70% Solomons Gold - 70% Please visit CocoaRunners.com Please visit CocoaRunners.com Blanxart - Dominican Republic 72% or Original Beans - Beni Wild Harvest	Crafted from cacao and nothing else, these wonderfully intense bars are the purest interpretation of cacao. Jammy pudding-like bars with distinctive fruity berry notes and much more from the first bite. Crafted from cacao that has been dried around open fires, these bars have a distinctive sweet smokiness. Bright, pristine and delicate dark chocolate bars with a sharp sherbert and citrus finish. Earthy bars retain the grassy green notes of the land in which they're grown. Sometimes almost vegetal and truffle-like. Rich, molten and indulgent dark chocolate bars.
 MILK	Dark Classic Alternative	Bonnat - Surabaya Original Beans - Esmeraldas Milk or Akesson's - Bali with Fleur de Sal Please visit CocoaRunners.com	With over 50% cocoa, these bars have the intensity of a dark chocolate and the sweet creaminess of a milk chocolate bar. Rich, creamy caramel notes from the start in these classic milk chocolate bars. Crafted from cooa, sugar and non-cows milk, these bars are great for those looking to reduce their lactose intake.
 WHITE	Classic Toasted Alternative	Original Beans - Edel Weiss Please visit CocoaRunners.com Please visit CocoaRunners.com	Made from cocoa butter, sugar, and milk, these silky white chocolate bars have more cocoa than most mainstream dark chocolates. Using caramelised sugar gives these bars their natural blonde look, and a distinctive toasted flavour. Crafted from cocoa butter and alternative milks such as coconut milk, soya milk or goats milk, these bars are a white treat for those seeking.
 INCLUSIONS	Nibs Textured Flavoured	Montecristi - 70% Canuto with Nibs Taza - Mexicano Cinnamon Akesson's - Madagascar with Pink Pepper	Adding cocoa nibs to a bar gives each bite a pleasing crunch and releases bursts of fruit with every bite. Coarse and stone ground - until the Swiss worked out how to conche chocolate 150 years ago, all bars had a coarse texture. With inclusions and flavourings that highlight the unique profile of each cocoa.

SOME FINAL THOUGHTS

- Acquire the habit “out of house”
- Show the art and craft (barista ...)
- Use the label to tell the story and show the difference
- Help the customer with advise and curation (chocolate DJs)
- Takeover an existing habit ... hard to create new ones (but can be done ... salted caramel)

BACKUP SLIDES

THE COFFEE SHOP EXPERIENCE



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SOME FINAL THOUGHTS

- Use the label to tell the story and show the difference
- Prices and margins (to grow)
- Think hard about the internet And for Amazon, think about curation, special skus and unique bundles
- Experiences
 - Try before you buy ... tastes are acquired outside home first
 - Show the art and craft the difference
- Help the customer with advise, curation and guidance (DJs)
- Takeover an existing habit ... hard to create new ones (but can be done ... salted caramel)

COFFEE GRADING

Th

Tric

Olfactory Tests

Sensory Skills

Organic Acid Matching P



COFFEE QUALITY
INSTITUTE®



LICENSED Q GRADER CERTIFICATE

This document certifies that Mr./Ms.:

Spencer Turer

The Coffee Quality Institute and the Specialty Coffee Association of America confer the honor and professional distinction of SCAA/CQI Licensed Q Grader to the holder of this certificate for having successfully passed all of the Licensed Q Grader exams. CQI and SCAA hereby for 36 months extend all the privileges as described in the Q Grader Rules and Regulations, and the holder of this certificate agrees to uphold the Q Grader Code of Ethics established by the Q Coffee System.

Presented this 8th day of June, 2012

Instructor | Craig Holt

Location | Private Lab

Ric Rhinehart

Executive Director

Specialty Coffee Association of America



SPECIALTY
COFFEE ASSOCIATION
OF AMERICA



Coffee Quality Institute®

Ted Lingle

Executive Director

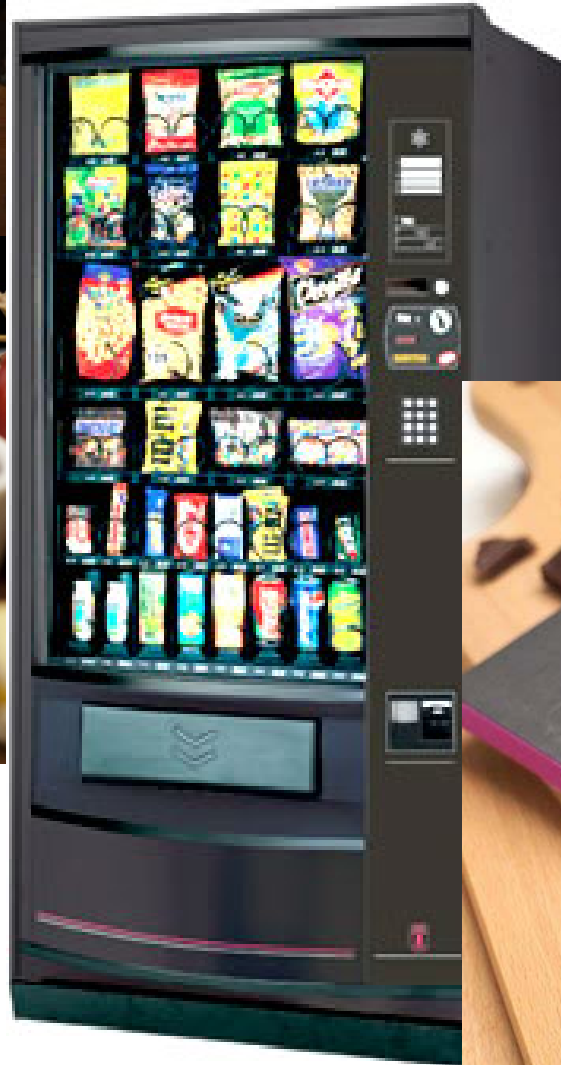
Coffee Quality Institute



SOME COMPARISONS BETWEEN CRAFT COFFEE, BEER AND CHOCOLATE

- Price premium – pretty much the same
 - Craft beer is (generally) 2-5x more than mass beer
 - Speciality coffee is 3-10x more than instant coffee and 2-5x more than “mass beans”
 - Craft chocolate is 3-7x more than supermarket bars (and can be less than “premium” mass bars)
- Occasion – very different?
 - For craft beer and speciality coffee it’s the same “habit” that you upgrade
 - Morning joe
 - Visit to coffee store / Pub / Bar
 - ... craft chocolate isn’t really a substitute for the sugar rush of confectionery mid-afternoon
- And it’s harder for consumers to identify craft chocolate

MORE THAN SNACKING



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SOME SUGGESTIONS

- Labels
 - Highlight craft's uniqueness
 - Learn from SCIA, Craft Beer
- Margins (to grow)
- Guidance (DJs)
- Think about the internet And for Amazon, think about curation, special skus and unique bundles
- Experiences
 - Try before you buy ... and habits are acquired outside home first (coffee, wine, beer, tea, etc.)
 - See the difference (hat tips to Zotter, Dandelion, PSC, etc.)
- Bean quality grading (makers and consumers deserve better..)
- Occasions ... where is our salted caramel moment?

C O C O A R U N N E R S



SOME SUGGESTIONS

SOME SIMILARITIES

- Beans ... fermentation, drying and roasting
- Direct trade, fair trade, environment, etc.
- Price premiums ...
- Price erosion, commodification and Amazon
- Need for advise and curation