



marHabab  
مرحباً

Dia dhuit

Hello

# KIA O RA

Ni Hao  
你好

Halo





## **BUILDING A GLOBAL, ARTISAN STYLE, 5<sup>TH</sup> WAVE, RESPONSIBLE COFFEE BRAND**

- Who are Cooks Global Foods?
- How do we deal with different cultures?
- What are the core values?
- How are we building a 5<sup>th</sup> wave business?



**LISTED ON THE NEW ZEALAND  
STOCK EXCHANGE**

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**>600 SHAREHOLDERS**

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**DIRECTORS, FRANCHISEES &  
MANAGEMENT HOLD APPROX  
80% OF SHARES – ALIGNED  
INTERESTS**

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**MARKET CAPITALISATION  
€25M**

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**ACQUIRED ESQUIRES IN  
OCTOBER 2013**

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ESQUIRES  COFFEE

SCARBOROUGH  
FAIR

  
design  
environments

  
CRUX  
PRODUCTS

GROUNDED  



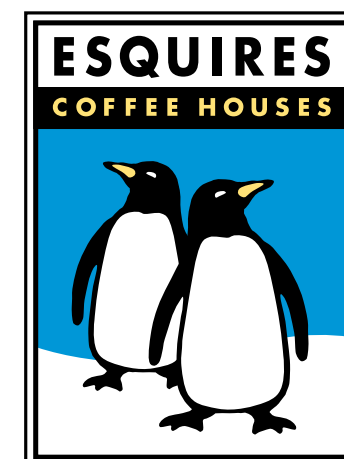
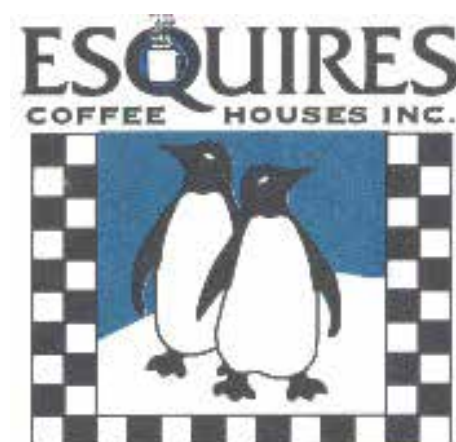

## ESQUIRES WAS FOUNDED IN CANADA IN 1993

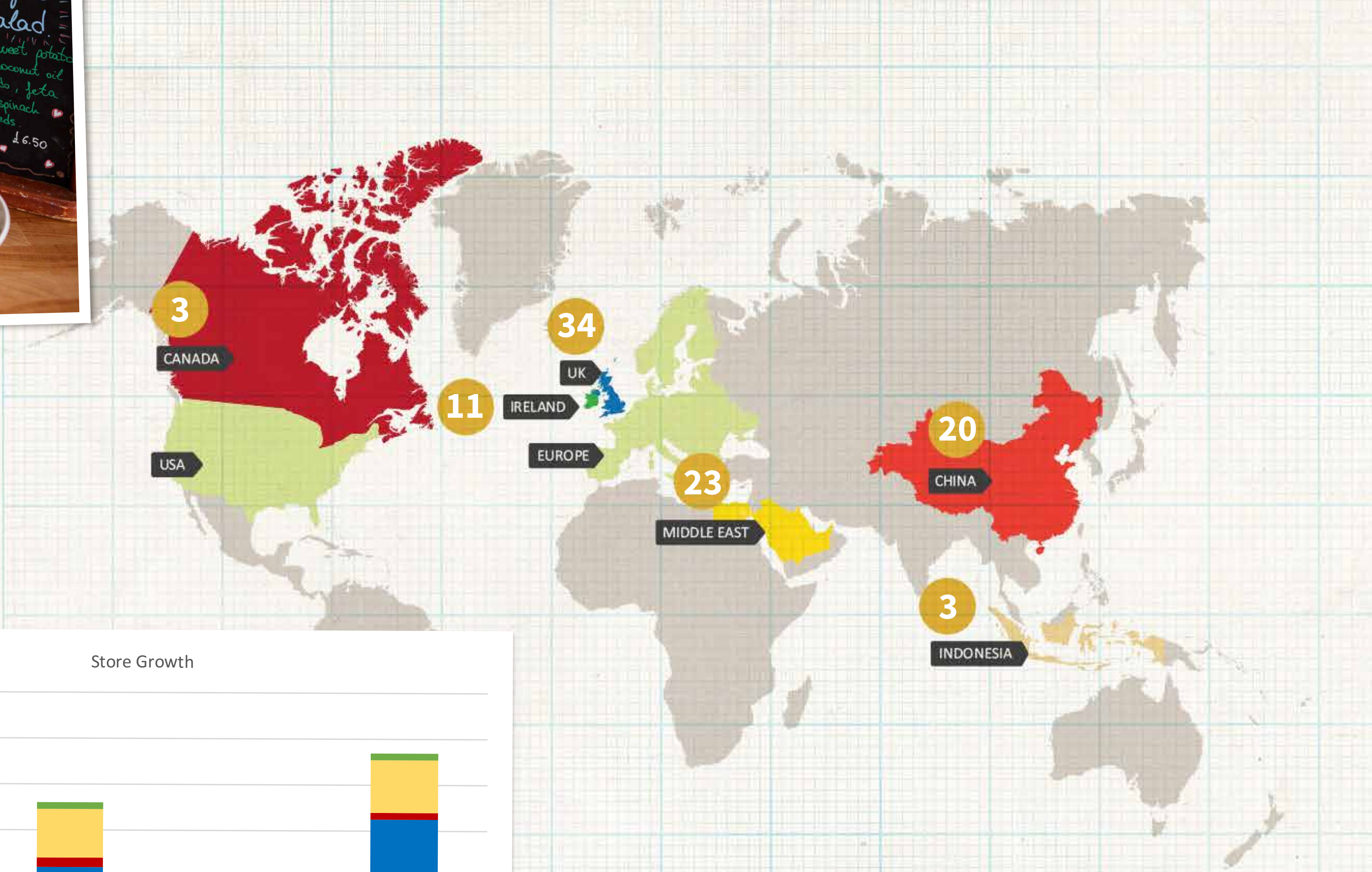
**123** Esquires coffee houses today with 94 under CGF

All markets and cafes at different stages on the journey

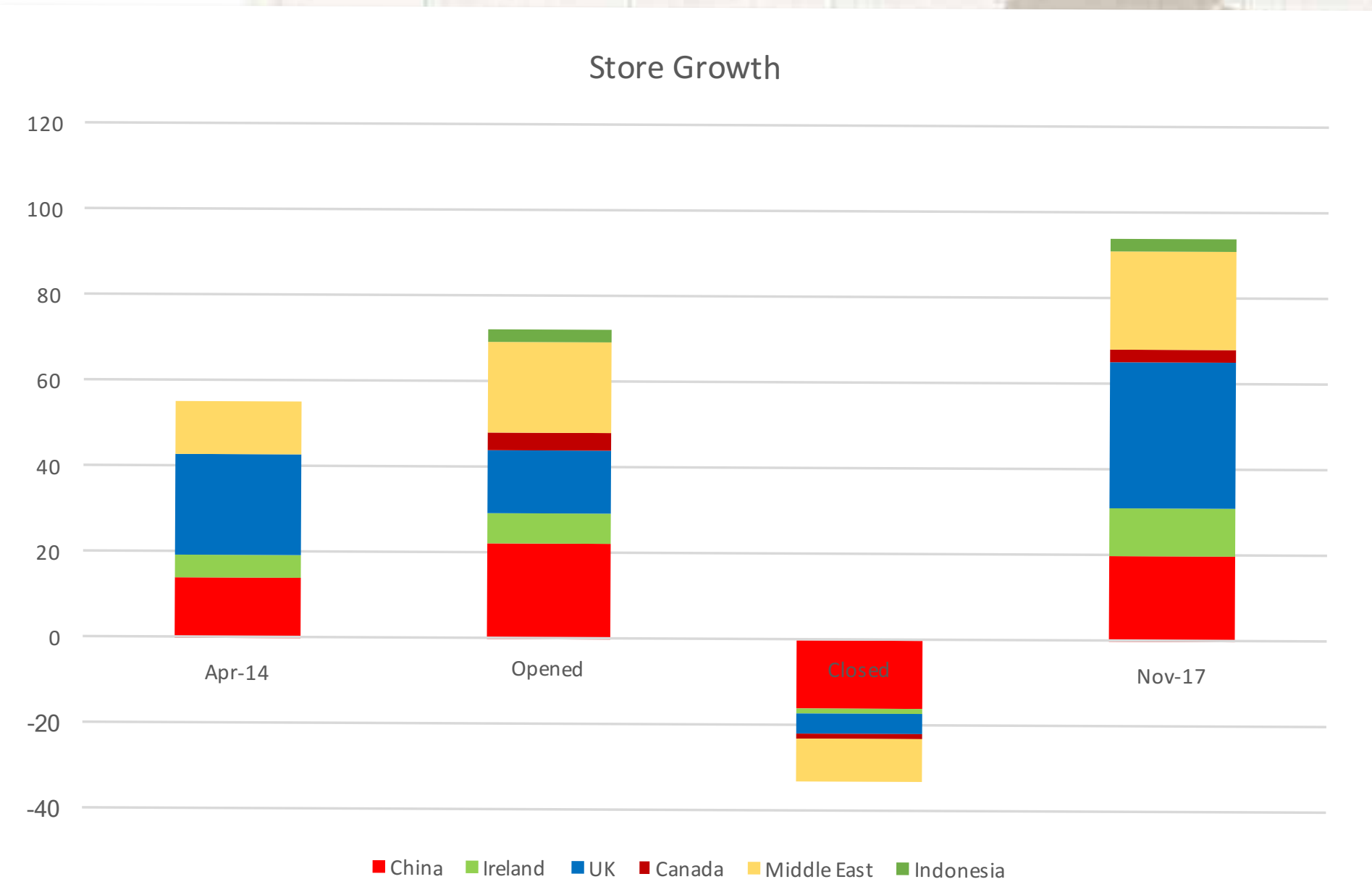
Building an ethical & responsible chain using artisan & independent values – localised to community

### THE EVOLUTION OF ESQUIRES LOGO





# ESQUIRES TODAY



**TOTAL STORE NUMBERS 94**

● Pending - Portugal, Pakistan & USA

# ESQUIRES STORE REVENUE

Breakdown H1 FY18

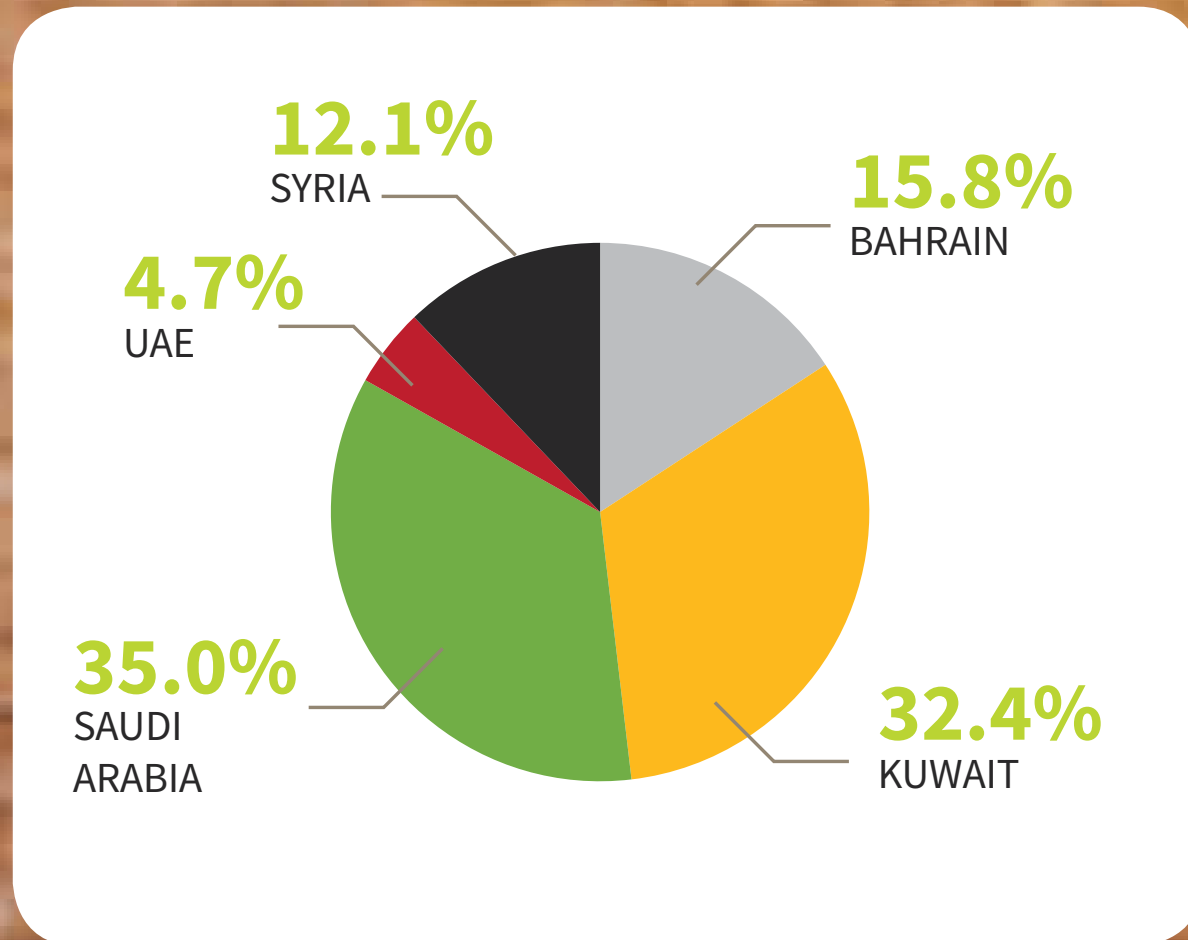
**37.2%** UK

CANADA **1.8%**

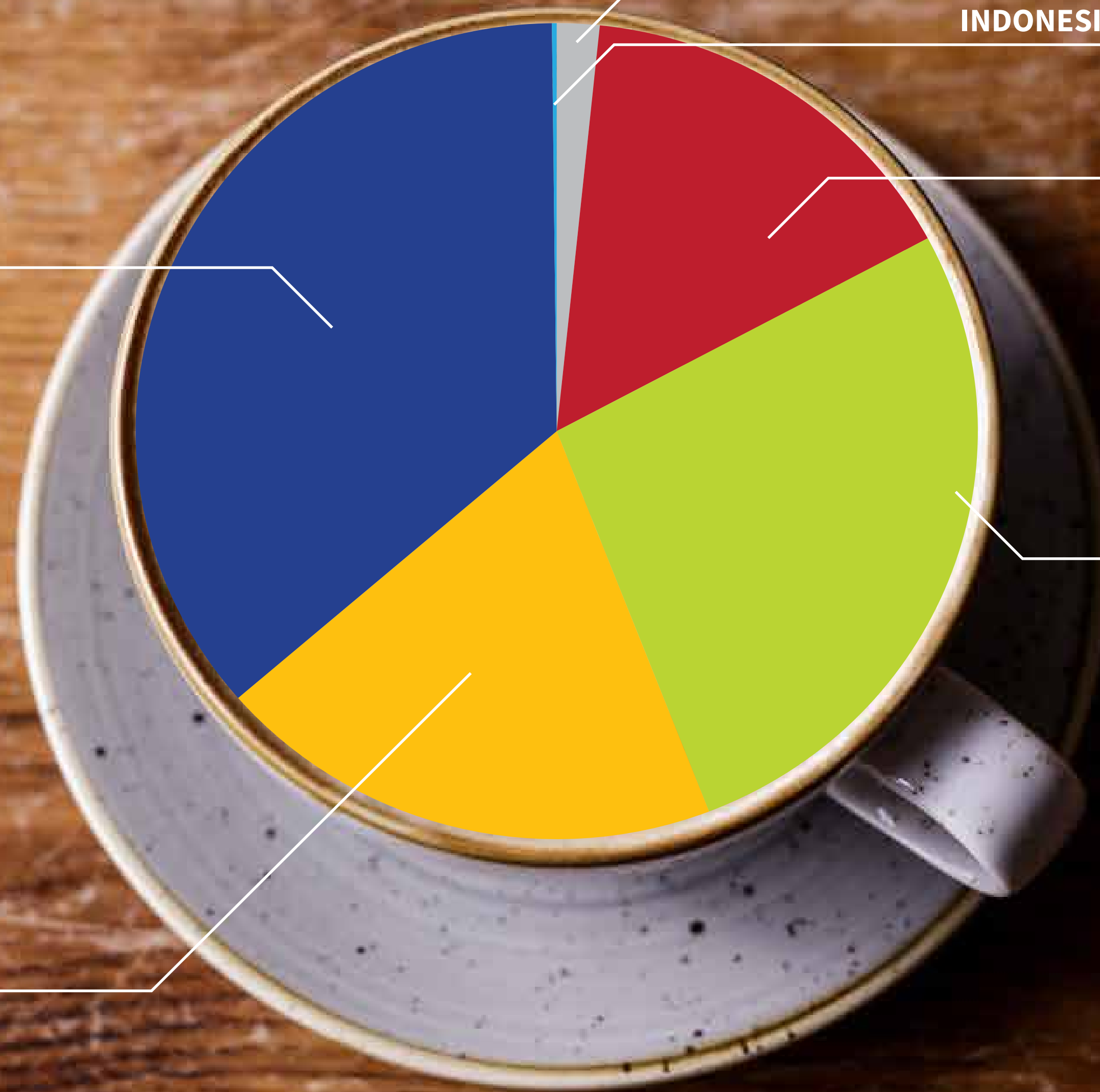
INDONESIA **0.3%**

CHINA **10.7%**

IRELAND **30.6%**



**19.4%** MIDDLE EAST



# ESQUIRES BRAND



**ENVIRONMENTALLY RESPONSIBLE**



**RESPONSIBLY SOURCED COFFEE**



**LOCAL COMMUNITY FOCUSED**



**ARTISAN VALUES**



**HONEST FOOD, HEALTHY OPTIONS**

**REFLECTS NEW ZEALAND AND ITS COFFEE CULTURE**



**BUILDING A GLOBAL,  
ARTISAN STYLE,  
RESPONSIBLE  
COFFEE BRAND.**



**A PASSION FOR A HEALTHIER PLANET  
WITH HEALTHIER PEOPLE.**



**RESPONSIBLE COFFEE, RESPONSIBLE  
CULTURE.**



**A LOVE FOR COFFEE, FOOD AND PEOPLE.**



**ALIGNED VALUES WITH OUR MILLENNIAL  
CUSTOMER.**



**KEEP IT EACH STORE UNIQUE AND PART OF  
THE LOCAL HOOD**



# LOCALISATION UK

Before



After



## Ambleside (Lake District)

- Rebranded in January this year
- Sales up >70%
- Contemporary design
- Enhanced food & Beverage offer



## Balham

- Rebranded Independent café
- Kept essence of local character



## Twickenham

- New store
- Localisation - theme of rugby adopted due to the close by Twickenham stadium

## Key trends

- **Speciality Coffee development – SS up 6%**
- **Food growth – SS up 14%**

# LOCALISATION IRELAND



## Carrick on Shannon

- Local store in Retail park
- Significant community engagement
- Strong food offer



## Mullingar

- Mall location
- Finalist in Ireland Retail Excellence awards 2016, 2017
- Strong food offer



## Findlater house (Dublin)

- O'Connell Street location
- High tourist trade
- More coffee focused
- Food 33%

## Key trends

- Development of speciality coffee

# LOCALISATION CHINA

## Change being driven from Super Cities – especially Shanghai

- Trend setting cafes such as S Engine
- Specialty Coffee
- Wide range of Single Origins



S Engine

## Esquires in Tier 4 City - Weihai (2 million population)

- 2 stores recently rebranded
- Organic not trusted
- Fairtrade not established
- NZ linkage used as key differentiator
- NZ has high reputation for safe food
- First store now reopened for >4 months with sales up 76% v last year
- Coffee still basic blends,
- food 20%



Weihai - Dragon Mall



Weihai - Tongyi Road



## Rapidly growing market with low coffee consumption

- Consumption per capita 6 cups p.a.

## Key trends

- Speciality Coffee growth
- High use of social media

# LOCALISATION REST OF THE WORLD

## MIDDLE EAST

Each country at a different stage

Dubai leading the way & advanced other markets

Most of Esquires stores are mall based

- Evening is major sales time
- More than 50% of sales after 6pm
- Localisation of coffee (Arabic), milk (Camel) and a regionally adopted food offering

Special rules for women & families in Saudi Arabia that have significant design implications



Flamingo Mall



Abu Dhabi Mall

## INDONESIA

Rapidly growing market

- Strong Specialty Coffee scene
- Local coffees popular
- Wide range of Single Origins
- Esquires has 3 stores in Jakarta



Belpark



Bintaro

## Key trends

- Speciality Coffee growth
- Cold drink growth
- Food growth especially desserts in Middle East (70% of Food sales)

## RETAIL PRODUCT

# GROUND



RESPONSIBLE COFFEE

**All of our coffee is Climate Neutral,** meaning we neutralize our carbon footprint by planting trees in some of the regions from which we source coffee; and it's all certified 100% Organic and Fairtrade



A photograph of two young women sitting at a table in a cafe. They are both looking at a smartphone held by the woman on the left. The woman on the right is pointing at the screen. There are two white coffee cups on the table in front of them. The background is slightly blurred, showing other people and warm lighting.

# SUMMARY

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## THINK GLOBAL, ACT LOCAL

- Focus on responsible & ethical principles
- Specialty coffee & modern healthy food

## MARKETS HAVE DIFFERENT CONSUMER REALITIES BUT VALUES ARE SIMILAR

## MARKETS & CAFES WILL TRANSITION AT DIFFERENT TIMES & SPEEDS

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## BUILDING TOWARD 5TH WAVE IS A LONG JOURNEY, WE HAVE MADE A START