

Brewing Expansion in Berlin

Market intelligence for a Parisian specialty coffee brand entering one of Europe's most saturated — and most discerning — coffee markets.



A market at maturity

Europe’s specialty coffee market has matured. In Berlin the fourth wave is established: roasters, cafés and disruptors compete on origin, method and design, in a city where customers read a room before they taste the coffee.

Retail deployment alone places a Paris brand beside incumbents on their own terms. The brief was to find the ground where an ultra-premium Parisian identity reads as an addition rather than as one more arrival.

In a saturated market the question is not where to open. It is who will vouch for you.

OBJECTIVE

Equip the brand with intelligence it can act on: where ultra-premium differentiation is still available in Berlin, which partnerships carry the right audiences, and what a first move costs if it goes wrong.

CLIENT

Parisian specialty coffee brand

MARKET

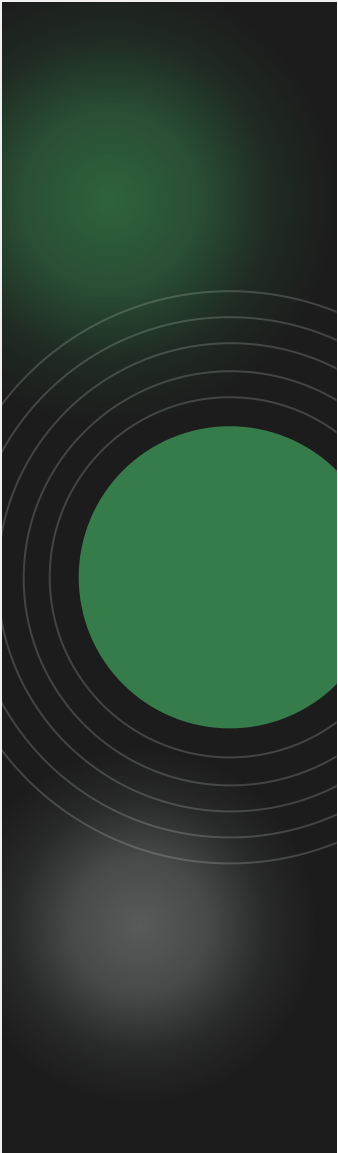
Berlin

FORMAT

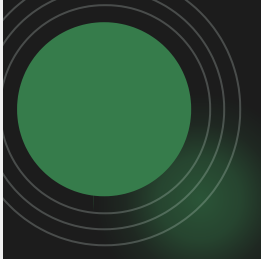
Strategic market intelligence

REMIT

Analysis, partnership framework, network

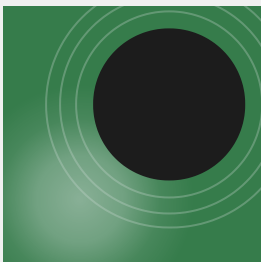


The groundwork

**01**

Competitive landscape

A reading of Berlin's fourth-wave market: established roasters, design-led newcomers, and the institutional accounts already taken. One finding shaped everything after it — the city's major cultural institutions hold standing specialty coffee partnerships, so that segment is closed rather than open.

**02**

Tiered partnership framework

A four-tier matrix ranking cultural partnerships ahead of conventional retail, adapting the model that works in Paris to a city that reads affiliation differently. Each tier scoped by audience quality, cost structure, and what an unsuccessful partnership would cost to unwind.

**03**

Cultural network activation

Five years inside Berlin's creative sectors converted into a qualified prospect list across galleries, design retail and independent institutions — access a market study cannot buy and a consultancy cannot rent.

PRINCIPLE

A saturated market has no empty shelves. It has unclaimed alliances.

How the work was run

The engagement was scoped as intelligence rather than implementation: the founder makes the call, the work makes the call informed. Findings were delivered as a strategic framework document and carried into a French edition for the brand's own reading. Partnership targets were qualified before they were proposed — tier, audience, cost structure, exit — so that no recommendation arrived without its downside attached. Working sessions with the founder set the direction; the written framework holds it.

Client and partnership targets not named.

KEY SUCCESS FACTORS

Advisory positioning held: intelligence, not franchise

The closed segment identified before budget went to it

Partnerships ranked by audience quality rather than footfall

Fixed costs converted to revenue share where the tier allowed

Every target qualified with its exit before it was proposed

Findings delivered in the founder's own language



REDUCED ENTRY RISK

Fixed costs converted into revenue-share arrangements where the tier allows, access to pre-qualified premium audiences, and a lower break-even through the establishment phase.

BRAND POSITIONING

The brand read as part of Berlin's cultural fabric rather than as an import, through affiliations its audience already trusts.

GROWTH PATHWAYS

A partnership foothold that can be widened city by city, and a method that transfers to the next market.

At a glance

WORKSTREAM	OBJECTIVE	WHAT WAS RUN	SUCCESS FACTOR
● Competitive landscape	Find where ultra-premium differentiation is still available	Fourth-wave mapping, incumbents and disruptors, institutional accounts	The closed segment found early
● Partnership framework	Rank alliances above retail deployment	Four-tier matrix by audience, cost structure and exit	Audience quality over footfall
● Network activation	Turn five years in Berlin into access	Prospect qualification across galleries, design retail, institutions	Access that cannot be rented
● Engagement management	Keep the work advisory	Founder working sessions, written framework, French edition	Intelligence, not implementation

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