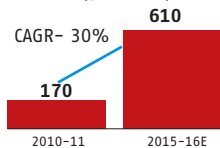


SERVING A HEADY BREW

CAFÉ MARKET: CURRENT SIZE

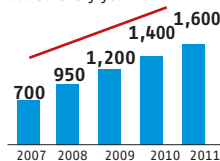
- The café market in India is estimated at \$170 million in 2010-11 and is expected to grow at a CAGR of about 30% over the next five years

Organised café market (\$ million)



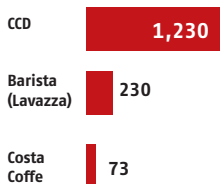
A spreading aroma

Over 200 cafes added every year

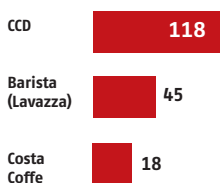


Source: Technopak Research & Analysis

Retail footprint (no. of stores as of Dec 2011)



Estimated revenues (2011 - \$ million)



- Growth driven by an addition of 200 stores per year on an average over last five years

- Café Coffee Day is the market leader, both by retail footprint and revenues

- International chains like Gloria Jean's, Coffee Bean & Tea Leaf & Illy have a limited footprint in metro and mini metro cities

- Italian coffee chain Testa Rossa is the most recent entrant

CAFÉ MARKET TRENDS

- The Indian youth is increasingly looking for ways to spend fun time with friends. Coffee shops feature high on list
- Due to their relaxed un-intimidating atmosphere
- Brand emphasis on having a good time
- Widespread presence in metros and penetration into mini metros.
- Pocket friendly outing especially for youth

Revenues from Café business only, Other businesses of CCD include – vending machines, coffee plantations, exports etc.
Source: Technopak Research & Analysis