Article

Consumer preferences on the coffee market in developing Central European Countries: on the example of Poland

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Abstract: The article addresses the issue of consumer preferences for types of coffee in Poland (ground coffee, instant coffee, coffee beans, instant coffee mixes and instant cappuccino). The main source of the study is the results of primary research conducted using a structured interview (CAPI - Computer Assisted Personal Interview) on a nationwide sample of 800 coffee consumers. The research was conducted by Grupa IQS Sp. z o.o. from Warsaw in January 2016 for the MOKATE Group based on the assumptions and guidelines developed by the authors of the article. The main purpose of the article is to present the identified coffee consumer preferences in Poland with regard to various kinds of coffee. The results of the research which have been included in the article indicate, among others, ongoing changes in the preferences of Polish consumers regarding their coffee choices. They prove that Polish consumers are drinking ground coffee more and more often. The consumption of instant coffee is decreasing.

Keywords: consumer preferences, coffee market, coffee, research results

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1. Introduction

In Poland, coffee is fourth in the ranking of food categories in terms of annual turnover and the value of the coffee market (PLN 3.49 billion) is growing [1]. In the 21st century, coffee has become the second most important product of international trade - after oil and, according to H.R. Neumann of Neumann Kaffe Group, the world demand for coffee will increase from 152 million bags in 2015 to 200 million bags by 2030 [2]. This results in increased competition on the market, as well as an increasingly extensive product offer. A rich product offer causes, in turn, that the consumer is often spoilt for choice when choosing a product among many other products available on the market. The final decision regarding the selection of coffee is determined by a complex set of factors such as the quality of the product, convenience and the method of preparation, as well as the price. Another very important factor which is taken into account by the coffee consumer in the decision-making process is the type of coffee.

In companies oriented toward marketing, consumers are at the centre of attention and learning about their market behaviour and preferences is the starting point in the process of shaping the marketing strategy. An organisation, thanks to the right marketing strategy, can better adapt to its environment, which is a key element of strategic management. Source literature defines it as strategic alignment [3-7]. Therefore, the main aim of the paper is to discover the preferences of coffee consumers in Poland regarding various types of coffee (ground coffee, instant coffee, coffee beans and instant cappuccino). A systematic increase in the number of opportunities available to consumers in terms of the availability and meeting the needs of the coffee market in Poland means that consumer preferences for coffee are increasingly changing, and therefore require constant monitoring. This is a research article, prepared on the basis of source data collected by the IQS Group from Warsaw in January 2016. The study of consumer behaviour on the coffee market in Poland was financed by the MOKATE Group, based on assumptions and guidelines developed by the authors of the article. The data which were obtained and the conclusions drawn from them were used to revise and redefine the marketing strategy implemented by MOKATE SA.

The classic understanding of the coffee market reduces its definition to the sum of the trading relationships between sellers offering coffee beans, coffee products, and the buyers - representing the demand for these products. It includes both the subjective (who participates in the trading process) and the objective aspect (what is the object of trade) [8]. With regard to the coffee market, the subjects are the growers - suppliers of coffee beans, dealers, producers of roasted coffee beans (coffee roasters), coffee processors and coffee distributors (wholesalers, retailers, service providers) - the supply side of the market, as well as the buyers of coffee (coffee consumers) - the demand side. The objects of the coffee market are the green coffee beans, roasted coffee beans, as well as various products based on these grains (e.g. coffee beans, ground coffee, instant coffee, cappuccino) and hybrid products offered by businesses serving coffee in the form of a ready-to-drink beverages [9].

The largest supplier of coffee beans in the world is South America (71.4 million 60kg bags of coffee in 2017) and, more precisely, Brazil, with an annual production volume of about 55 million bags in 2017. While the supremacy of Brazil, with its huge plantations covering a total of about 2 million hectares of the country's area, remains unwavering, the situation is more fluid in further positions. According to the geographical breakdown, the following should be included as the world's largest coffee producers in 2017, besides Brazil: Vietnam (25.5 million), Colombia (14.6 million), Indonesia (11.5 million), Honduras (7.5 million) and Ethiopia (7.3 million). In further positions, the following countries have ranked respectively in recent years: India (5.2 million), Uganda (5.0 million), Peru (4.2 million) and Mexico (3.8 million) [10].

The largest portion of global coffee production (approx. 159 million bags) goes to the European market (approx. 52 million bags), followed by the emerging Asia and Oceania markets (approx. 35 million bags) and the North American market (approx. 30 million bags) [11]. According to the International Coffee Organization in London, the aggregate demand for coffee beans in the world during the 2017/2018 cultivation season will amount to 158,953,000 bags of coffee, exceeding the production of coffee beans by 23,000 bags. Table 1 presents the supply and demand for coffee beans in the world and their changes in 2016-2017.

Table 1. Supply and demand for coffee in the world (in thousands of coffee bags x 60kg).

	2014	2015	2016	2017	Change 2016-2017 [in %]
SUPPLY SIDE OF THE GLOBAL COFFEE MARKET					
Coffee production (total)	149077	152108	157694	158930	0.8
Arabica	86281	88433	102174	98843	-3.3
Robusta	62796	63675	55520	60087	8.2
Africa	15964	16338	17123	17929	4.7
Asia and Oceania	45974	49566	44968	47642	5.9
Mexico and Central America	17189	17238	20466	21924	7.1
South America	69951	68966	75137	71435	-4.9
DEMAND SIDE OF THE GLOBAL COFFEE MARKET					
Coffee consumption (total)	151727	155756	157382	158953	1.0
Countries exporting coffee (total)	47198	48253	48514	48998	1.0
Countries importing coffee (total)	104527	107503	108868	109954	1.0
Africa	10705	11031	11309	11404	0.8
Asia and Oceania	32550	33605	34425	35300	2.5
Mexico and Central America	5238	5315	5239	5266	0.5
Europe	50914	51626	51693	51924	0.4
North America	27359	28931	29380	29658	0.9
South America	24960	25248	25335	25400	0.3
BALANCE OF THE GLOBAL COFFEE MARKET					
Difference (Production - Consumption)	**-2648**	**-3648**	**312**	**-23**	**-**

Source: own study based on [10].

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Additionally, the 2018 report from Mintel Group Ltd. [10-11] shows that the global coffee market is still growing with the growth trend being particularly visible in Asia, where the residents traditionally drink tea, but are slowly changing their habits and are starting to consume more and more coffee. The culture of drinking coffee is also developing in the countries of Latin America, North Africa and the Middle East, which in turn translates into more sales. In mature European markets (including Poland), the growth is already much smaller. In North America, the market development is mainly driven by the increase in the consumption of coffee in pods and ready-for-consumption chilled coffee.

The average annual consumption of coffee per capita in Poland is about 2.85 kg. For comparison, in Finland it amounts to as much as 12 kg, in Sweden - 11 kg, in Denmark, the Netherlands, Norway - 9 kg [12] Total coffee sales in Poland in 2017 amounted to nearly PLN 3.5 billion, an increase of approx. 3.7% in comparison to 2016. Selected information on the sale of coffee in Poland and its prices is provided in Table 2 and Figure 1.

Table 2. Coffee sales in Poland in 2015-2017.

	2015	2016	2017	Annual growth rate in % (2015/2016)	Annual growth rate in % (2016/2017)
Coffee sales in PLN millions	3317.6	3357.68	3487.7	1.2	3.7
Coffee sales in tons	82097.3	83616.2	82406.5	1.8	-1.5
Coffee sales in thousand of units	451727.3	438981.9	422494.9	-2.9	-3.9

Source: own study based on [1].

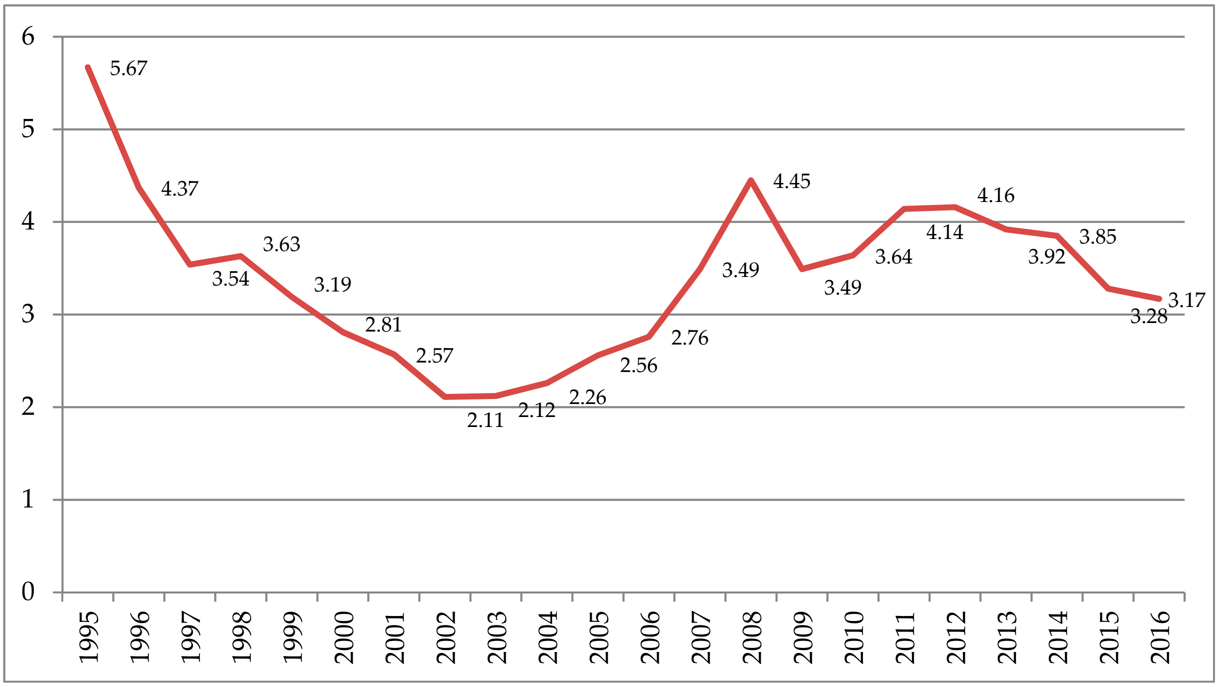

Figure 1. Retail coffee prices in Poland in 1995-2016 [in USD per lb]
Source: Own study based on [10].

The data presented in Table 2 and Figure 1 show that, despite the decreasing number of coffee packages sold and the drop in its prices, the coffee market in Poland (coffee sales) is growing steadily. This is mainly related to changes in consumer behaviour on the market of coffee products in Poland. Poles are increasingly replacing cheaper coffee with more expensive ground coffee or grain coffee, which will be demonstrated in the next section of the article.

2. Materials and Methods

Consumption, which is a very important aspect of the market behaviour of consumers, has been the subject of constant research interests in many scientific circles for a number of years [12-14]. It is also reflected in recently intensified interest from many technical, economic, medical and agricultural circles. The main cause of this fact is the essence of the consumption phenomenon, that is, the process of meeting human needs, which, as we know, is not always fully defined, varied in content and form, variable in time, dependent on a specific place, time, environment [15-16]. The research methodology for consumer behaviour on the market focuses on obtaining primary and secondary information, necessary to identify the complex phenomena and processes involved in making market choices, purchasing decisions, along with the procedure of preparing to make those decisions, and their effects [17-18]. This also applies to the coffee market in Poland.

Primary studies for this article were conducted using a structured interview CAPI (Computer Assisted Personal Interview). The purpose of the study was to identify coffee types preferred by consumers, in particular to identify purchasing behaviour and the opinion of consumers regarding coffee categories in Poland. The following issues have been subjected to a detailed diagnosis in the article:

(i) Preferences for the type of coffee drank;
(ii) Change in consumption of coffee according to its type;
(iii) History of coffee drinking by type;
(iv) Frequency of coffee drinking by type.

This article focuses on the study of consumer preferences in the coffee market. For this purpose, an induction method was applied in order to obtain reliable results concerning the preferences of coffee consumers in Poland in relation to coffee types. More precisely, the method of incomplete numerical induction was used. It is an inductive inference, the premises of which do not exhaust the whole universe of objects referred to by general rules expressed in the conclusion of reasoning. The premises here are specific views, the conclusion is a general view, and each of the premises is logically based on the conclusion. This is a method in which a general rule is derived from a limited number of details [19-20].

The study was conducted in January 2016 on a group of 800 respondents from various parts of Poland. Basic information about the research conducted is presented in Table 3.

Table 3. Basic information on the research.

Specification	Study
Research method	Standardised structured interview
Technique	Face-to-face, CAPI (Computer Assisted Personal Interview)
Average time of interview	50 minutes
Research tool	IQS platform: http://researchsolutions.grupaiqs.pl/
Definition of the sample	Nationwide sample of consumers of coffee and coffee beverages, people aged 18-55
Sample size	N=800
Spatial extent of research	Territory of Poland
Duration of research	January 2016

Source: own work.

The group of respondents was composed of coffee-consumers aged 16 to 55. The sample was selected in a targeted manner among persons who reported at least occasional consumption of coffee or coffee beverages. The population of respondents was diverse in terms of gender, age and education (Table 4).

Table 4. Characteristics of the test sample (N=800).

Specification		Percentage of respondents
Sex	Female	53
	Male	47
Age	16-24 years	13
	25-34 years	26
	35-44 years	30
	45-55 years	31
Education	Primary/vocational	33
	Secondary	40
	Higher	27
Net household income	Less than PLN 3000	14
	PLN 3001 – PLN 5000	25
	PLN 5001 – PLN 7000	14
	Above PLN 7000	3
	I don't know/refusal	44
Place of residence	Rural areas	39
	Town up to 49,000 residents	17
	Town from 50,000 to 199,000 residents	22
	Town above 200,000 residents	22

Source: own study based on research.

Moving on to the main part of the analysis, after the characterisation of the studied population, it should be noted that the data obtained on the basis of the research provides us with knowledge about the views of the respondents regarding the preferred types of coffee and instant coffee brands, and not the actual status in this regard.

3. Results

In Poland, coffee is mostly available for purchase in the form of ground coffee, instant coffee, coffee beans, so-called coffee mixes and instant cappuccino, and therefore at the very beginning of the study the respondents were also asked about the type of coffee they most often consumed. In addition, the results from this research were combined with the results obtained in December 2012, when the same study using the same method on a sample of 800 coffee consumers was conducted (Table 5).

Table 5. Coffee type preferences in 2012 and 2016 (%).

	Ground coffee		Instant coffee		Coffee beans		Instant coffee mix		Instant cappuccino	
	2012	2016	2012	2016	2012	2016	2012	2016	2012	2016
Coffee drunk any time	78.0	74.0	85.0	84.0	34.0	32.0	36.0	33.0	39.0	35.0
Coffee drunk now	47.0	55.0	67.0	50.0	9.0	10.0	9.0	6.0	12.0	7.0
Coffee drunk most frequently	40.0	45.0	51.0	40.0	3.0	7.0	3.0	2.0	3.0	2.0

Source: own study based on research.

The data presented in Table 5 shows that the consumption of instant coffee decreased over the period of four years (2012 - 2016), while the popularity of ground coffee and coffee beans (coffee drunk now and coffee drunk most often) increased. A slight downward trend has also been observed for instant coffee mixes and instant cappuccino. This may be due to the growing awareness of coffee consumers in Poland, their knowledge about healthy lifestyles, nutrition and the coffee types available [12, 21-22]. The importance of flavour and the value of the product are increasing, and such needs are better satisfied by less processed coffee, i.e ground coffee or coffee beans. Ground coffee and coffee beans are seen as pure, natural, traditional and strong coffees with intense flavour. Instant coffee, instant cappuccino, instant coffee mixes are increasingly perceived by consumers as a cheap, unnatural, caloric, unhealthy product, more like an "imitation coffee" drink, not real coffee [21, 23]. In the further part, the respondents were asked to identify how their coffee consumption had changed over the last few years - whether it had increased, stayed the same or decreased. The results are presented in Table 6.

Table 6. Change in coffee consumption in Poland by coffee type (%).

Specification	Ground coffee	Instant coffee	Coffee beans	Instant coffee mix	Instant cappuccino
	N=467	N=421	N=62	N=111	N=123
Increased	14.0	25.0	42.0	22.0	14.0
Stayed the same	78.0	69.0	53.0	72.0	80.0
Decreased	6.0	4.0	3.0	3.0	2.0
Hard to say	1.0	2.0	2.0	4.0	4.0

Source: own study based on research.

The data presented in Table 6 show that the consumption of coffee has increased. The biggest increase was observed for coffee beans. Consumers of ground coffee, instant coffee and coffee beans have been drinking their preferred type of coffee for many years (more than five years), instant coffee mixes and instant cappuccinos have a much shorter history (Table 7).

Table 7. History of coffee drinking by type (%).

Specification	Ground coffee	Instant coffee	Coffee beans	Instant coffee mix	Instant cappuccino
Less than a year	1.0	4.0	2.0	5.0	6.0
From 1 to 2 years	3.0	8.0	8.0	18.0	20.0
For several years, more than 2, but less than 5	7.0	13.0	21.0	32.0	27.0
More than 5 years	83.0	66.0	63.0	30.0	38.0
I don't remember	6.0	10.0	6.0	16.0	10.0

Source: own study based on research.

The study also found that the frequency of drinking ground coffee is the highest - 10% of respondents drink it three times a day and 36% once or twice a day (Table 8).

Table 8. Frequency of drinking coffee according to type (%).

Specification	Ground coffee	Instant coffee	Coffee beans	Instant coffee mix	Instant cappuccino
3 times a day and more	10.0	7.0	2.0	-	1.0
1-2 times a day	36.0	27.0	5.0	1.0	1.0
Once, several times a week	9.0	14.0	3.0	3.0	5.0
Less often	10.0	11.0	9.0	12.0	14.0
Never	35.0	42.0	81.0	84.0	80.0

Source: own study based on research.

T. Zalega [24], examining the consumption of coffee in households of the unemployed, qualified coffee (next to milk, sugar, bread, flour, groats, pasta, rice, vegetables, meat, vegetable oils, eggs and tea) as regular goods, for which the income elasticity coefficients of demand are inelastic, i.e. changes in demand take place more slowly than changes in income. In addition, his research has shown that consumers are very attached to the type of coffee consumed. In turn, research by J. Odorzyńska-Kondek [25] indicates that in 1996, 84% of the coffee consumers surveyed bought ground coffee. Unfortunately, most of the coffee beans imported at that time came from south-east

Asia and was of poor quality. Beans were often contaminated, broken, bitten by pests, and it was difficult to obtain a product with a high-taste quality, even in modern roasting plants. This resulted in consumers turning to instant coffee. In the second decade of the 21st century, however, the trend reversed (as demonstrated, among others, by the research results presented in the article). Poles appreciate coffee beans, and the high quality stimulates the search for methods of preparing coffee that will bring out the best aroma and taste.

4. Discussion

On the basis of the presented results it can be concluded that the fastest growing segment of the coffee market in Poland is coffee beans and ground coffee (which also translates into a valuable growth in the entire coffee market in Poland). On the other hand, consumption of processed coffee products - i.e. instant coffee, coffee mixes and instant cappuccino is on the decrease. This change is primarily a result of growing consumer knowledge about healthy eating, and the current fashion for a healthy lifestyle in general [12, 21, 23]. Coffee shop chains also played an important role in this respect. Thanks to them, many coffee consumers learned that there are more options besides instant coffee and "Turkish" coffee brewed in the cup [24-25]. For many years, coffee shop chains in Poland were promoting good standards of coffee preparation at a time when the range of coffee available in Poland was still very narrow. This applied both to the preparation of coffee itself and the promotion of knowledge about the different types of coffee. In the second decade of the 21st century, with the increasing number of coffee shops and good coffee beans available in Poland, the role of coffee shop chains in educating customers and baristas is decreasing. Consumers who want to drink good coffee now have more options than just coffee shops because good quality coffee beans or ground coffee are available in stores and can be prepared at home [1]. Thus, the development of the segment is influenced by the changing culture of coffee consumption as well as the development of consumer knowledge and requirements, and also by the increasing interest of Poles in coffee makers with a built-in grinder. The shift in interest from instant coffee to high quality coffee beans also means that consumers are becoming more and more picky about the type of coffee. At the same time, given the fact that on the Polish coffee market consumers are especially loyal to their favourite brands of coffee beans and ground coffee, and perhaps even more so to their specific flavours, coffee producers and distributors in Poland wanting to maintain or increase their market share are faced with a challenge [28]. The requirements of Polish consumers are constantly growing and their taste is becoming more sophisticated, therefore product innovations introduced in the right way can be the answer to this situation. Starbucks, which offers freshly ground coffee - 100% arabica from different regions of the world, can be a source of inspiration for coffee manufacturers and distributors in Poland. This coffee shop offers more than 15 types of coffee beans and a whole range of coffee drinks based on 100% fair trade espresso [11]. Following this example, coffee manufacturers and distributors in Poland should expand their product portfolio with the highest quality coffee beans and ground coffee. To distinguish their products on the market, the packaging should indicate the region where the coffee is grown, as this is crucial in order to inform customers about the coffee exclusivity. They should provide details regarding the variety of beans and trees, as well as the exact area where they were harvested. In addition, they should offer information about the altitude at which the coffee was grown, making the customer aware of its significant effect on the flavour. Emphasising the natural beneficial properties of coffee or adding functional ingredients can be a way to attract new customers and increase market share. However, we must remember that innovation is difficult in the coffee market and consumers' habits regarding coffee types and brands change very slowly. This type of activity undertaken by the managers of companies manufacturing and distributing coffee is, however, a necessity - it is a good response to the growing interest of Poles in good quality coffee beans and ground coffee.

5. Conclusions

The results presented, although they are not the results of representative research, may provide an insight into consumer preferences for coffee types in Poland, as well as the differences and similarities in the preferences for types of coffee.

Changing lifestyle and observed consumer trends [28-33] affect consumer behaviour and preferences. This is also visible on the coffee market [34]. The results obtained show that the changing preferences of Polish consumers in the coffee market are related to the type of coffee consumed. Among the aspects which have the most impact on the change of consumer preferences regarding coffee types, is, in particular, the growing product awareness of the consumers, which is the result of ever-increasing internet access.

In conclusion, the study shows that Polish consumers drink mostly ground and instant coffee (currently drunk by about half of the coffee consumers surveyed). Consumption of coffee has increased in the last few years, according to the opinion of consumers - with the largest increase in the case of coffee beans. The frequency of instant coffee consumption decreased in favour of ground coffee and coffee beans. Consumers of ground coffee, instant coffee and coffee beans have been drinking their preferred type of coffee for many years, instant coffee mixes and instant cappuccinos have a much shorter history.

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