Host/Mixer Observatory/2: Stars in coffee bars

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Significant interest is elicited from the role of the ice cream and pastry in coffee bars. According to FIPE, more than 130 thousand coffee bars operating in Italy (which increases to 171 thousand counting those located inside other locations; a European record) are still one of the most visited and popular locales by consumers. More than 20 million people visit coffee bars every day, giving rise to 500 million commercial transactions per year which generate 7 billion euro in value add and provide jobs to 363 thousand individuals. Overall, of the 72 billion euro per year in revenue earned from sales away from home, coffee bars capture 18 billion euro of it.

Of this total, 33 thousand are coffee bars that also serve pastry and scooped ice cream, while businesses specialised in both delicacies number approximately 19 thousand (18,856), accounting for 15% of total businesses and 12% of total revenue in the market. Stand-alone ice cream parlours and pastry shops number approximately 14 thousand (13,723) businesses and employ 40 thousand individuals. As to the geographic distribution of coffee bars-ice cream parlours-pastry shops, half of these (52%) is concentrated in the north of Italy. The region with the most ice cream parlours is Lombardy, with 2,231 businesses (16.3% of the total), followed by Veneto with 1,384 (10.1%) and Emilia Romagna with 1,293 (9.6%). Therefore, not only coffee bars-ice cream parlours, coffee bars-pastry shops, and coffee bars-ice cream parlours-pastry shops, but also a significant number of commercial operations and small businesses in which sales for take away and eat-in of pastry and ice cream represent the core business of the operation.

The business of clustered coffee bars-pastry shops, according to data processed by FIPE, consists predominantly in serving pastry products made in-house (37% of the revenues), coffee and baked goods (28%), ice cream products (10%), and non-alcoholic beverages (9%). Cluster operations are predominantly sole proprietorships (47% of the cases) and partnerships (44%) with four employees. The businesses that provide services measure an average of 57 m2 internal space used for sale and service with 14 seats and 38 m2 of space used for preparation (workspace, kitchen).

For their part, cluster pastry shops include 62% sole proprietorships and 27% partnerships, with up to two employees. In 58% of the cases, there is no staff at all. The floor area allocated to commercial activities is 35 m2 of space for retail sales and 17 m2 of storage. Most often, the location is free-standing and there is counter service. Cluster companies predominantly sell products made by others (71% of revenues) and sell to individuals (82% of revenues). Consistent with the type of clientele, sales made with a receipt represent 86% of total sales. The assortment of products made by others sold is composed mainly of fresh pastry (23% of revenue), baked goods (17%), dry pastry (10%) and biscuits and sweet cookies (10%).