



BRAND BREW

A COFFEE HUB MODEL



Brewing our iconic brands together!



Café Punta del Cielo®



WHY WE ARE HERE

The market is premiumizing. We have the coffee — but not the recall.

THE OPENING

- Coffee value **+71%** in 5 yrs, flat volume — all price/mix
- Out-of-home cups **+61%**; the ritual is growing

THE THREAT

- **Cielito** · **Tierra Garat** · **Starbucks** head-to-head today; FEMSA scaling Caffenio nationally (emerging)
- Quality (idx 118) is a table-stake — we win it but lose the moment of choice (TOM 12%)

OUR KIND OF BRAND



How we behave like...



Leaders



Challengers



Followers



Flankers

There is
no right or
wrong, just
choices...

KEY FINDING WHAT ARE WE CHALLENGING?



MENTAL BLOCKS

The belief that Mexican coffee is somehow inferior.

Premium coffee should be reserved for a few.

Great coffee experiences should all look and feel the same.

WHY THIS HAPPEN

We've accepted someone else's definition of great

We've confused exclusivity with excellence.

Not expecting originality and settling for familiarity.

JOB TO BE DONE

Create and offer the best cup of coffee for mexican taste

Push consumers to unlock the next level coffee

Consistently deliver intentional mexican creativity and design

CATEGORY CONTEXT

Mexican coffee is premiumizing — it lacks a ritual to justify it.

• VERIFIED • Euromonitor / Kantar

+71%

[RETAIL] coffee value MX 2020→25, flat volume

Euromonitor, Coffee in Mexico 2025

+61%

[OOH] cups 2020→25

Euromonitor 2025

28%

[OOH] drink coffee out-of-home

Kantar OOH

+24%

[RETAIL] fresh ground; specialty CAGR +11.6%

Euromonitor / Grand View

All growth is **price/mix** — people already pay more per cup. A "premium Mexican coffee with its own moment" doesn't exist yet in their mind. **That is the window.**

BY TIER AND GEOGRAPHY — THREE FRONTS, NOT ONE ENEMY

Who we actually fight today.

• VERIFIED · FEMSA majority of Caffenio, 2025

PRESENT RIVALS — CDMX CORE, TODAY

- **Cielito Querido + Tierra Garat** — head-to-head premium
- **Starbucks** — wins the social occasion

EMERGING THREAT — WATCH

- **FEMSA scaling Caffenio** nationally (~300 drive-thru, majority 2025)
- North/Bajío today, **not in CDMX yet** — the 24–36-month risk

SUBSTITUTE, NOT A PEER

- **Andatti / OXXO** (~\$25, on-the-go)
- A price anchor we differ from — **not a premium rival**

Dead ghost: "Mexican coffee is inferior." The fight is **distinctiveness + presence**, not the origin debate.

WHERE WE PLAY & WHERE GROWTH COMES FROM

The café is the engine. Not the shelf.

• VERIFIED • Euromonitor / Statista

WHERE WE PLAY

- **Cafeterías (OOH): #2 nationally, 11.6%** — our strength
- [RETAIL] shelf: 0.4% — not the battle (Nestlé 55%)

SOURCE OF VOLUME

- Win the **social occasion** back from Starbucks
- Recruit from OXXO/at-home (penetration), not from price

Category entry points to own: **morning-on-the-go** • **afternoon work** • **the social table.**

• DIRECTIONAL

ANDATTI BUILDS THE MARKET — PDC HARVESTS THE CLIMB

Don't fight the \$25. Harvest the trade-up.

• VERIFIED: 23,206 stores · 28 cups/day · \$25 (FEMSA) — 237M derived

ANDATTI / OXXO (CATEGORY BUILDER)

- 23,206 stores × 28 cups/day ≈ ~237M cups/yr (derived) at \$25
- FEMSA aims to triple (~100/day) — builds the daily habit

PDC'S OOH PLAYS (CAFÉ)

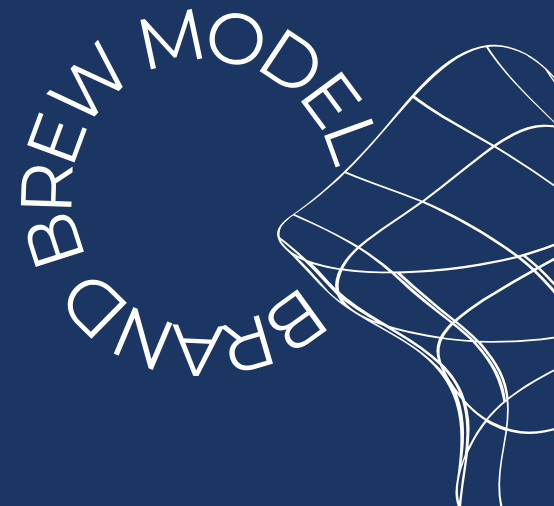
- **Own the trade-up:** grab-and-go premium for the consumer Andatti recruited
- Compete on **value-per-cup** (taste, ritual) — never on the \$25
- Density in morning / commute footprints — not price
- Café = brand showcase (retail = annex); grab-and-go premium for the climb — never price

[CAFETERÍAS · OOH] Andatti is a price anchor + gateway, not a premium rival. Retail plays (molido, capsules) → see the Retail annex. Trade-up pocket: to size in field (a share of the ~237M daily habit migrating up).

MARKET BEHAVIOUR:



**CHALLENGER
BRAND PUSHING
FORWARD
MEXICAN
COFFEE
PERCEPTION**



MAIN JOB TO BE DONE:

FACTS:

- 1- Low funnel conversion (P4W / P7D)
- 2- Better price elasticity
- 3- High Mexican brand attribution



Good set of loyal consumers, we
need to increase our users base

RECRUITMENT





1. FINDING OUR SOIL

Great brands, like great coffee, are defined by the soil where they grow.



Café Punta del Cielo®

We are a Mexican proud brand:

**A NEW GENERATION
OF MEXICAN
CREATORS PROVING
THAT EXCELLENCE
ISN'T INHERITED, IT'S
INTENTIONALLY BUILT.**



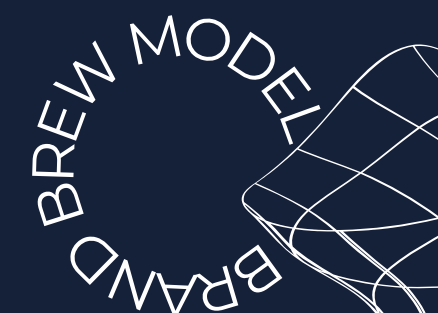
OUR SOIL



**ELEVATE
CREATIVE
CONFIDENCE**

KEY FINDING

“Punta del Cielo” naming inspiration = A higher level
-Pablo-

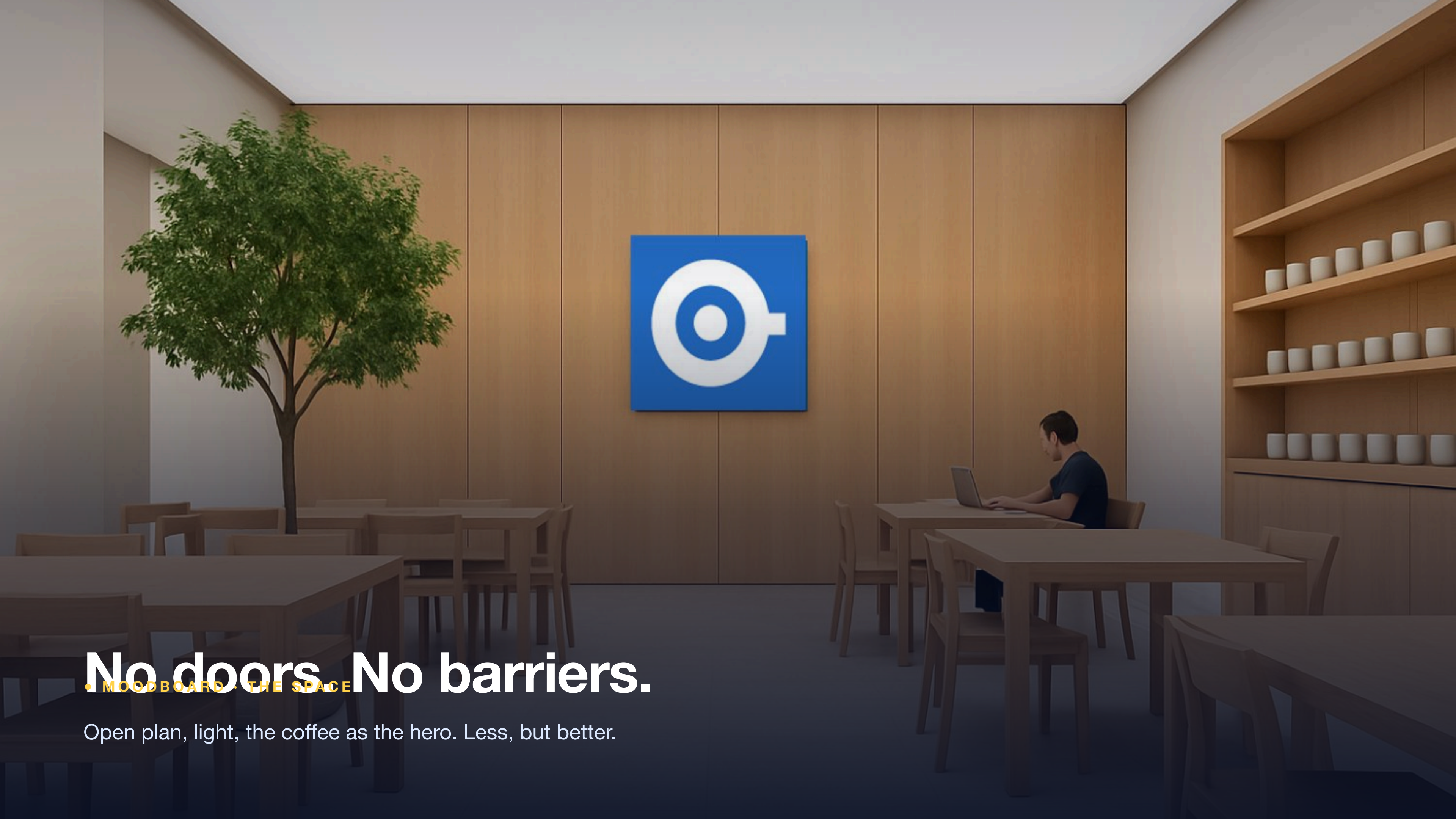




• MOODBOARD • INTENTIONAL DESIGN

Designed with intention. Unmistakably ours.

A space that becomes a distinctive brand asset — not another café.



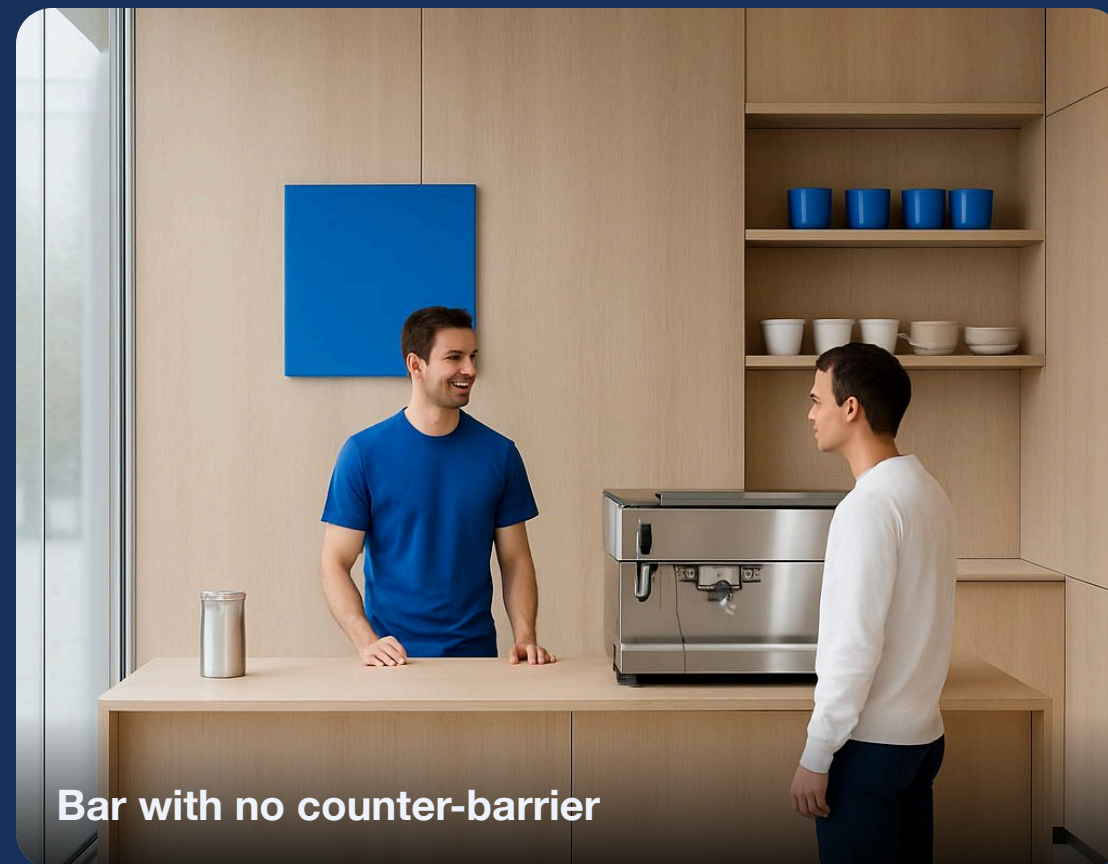
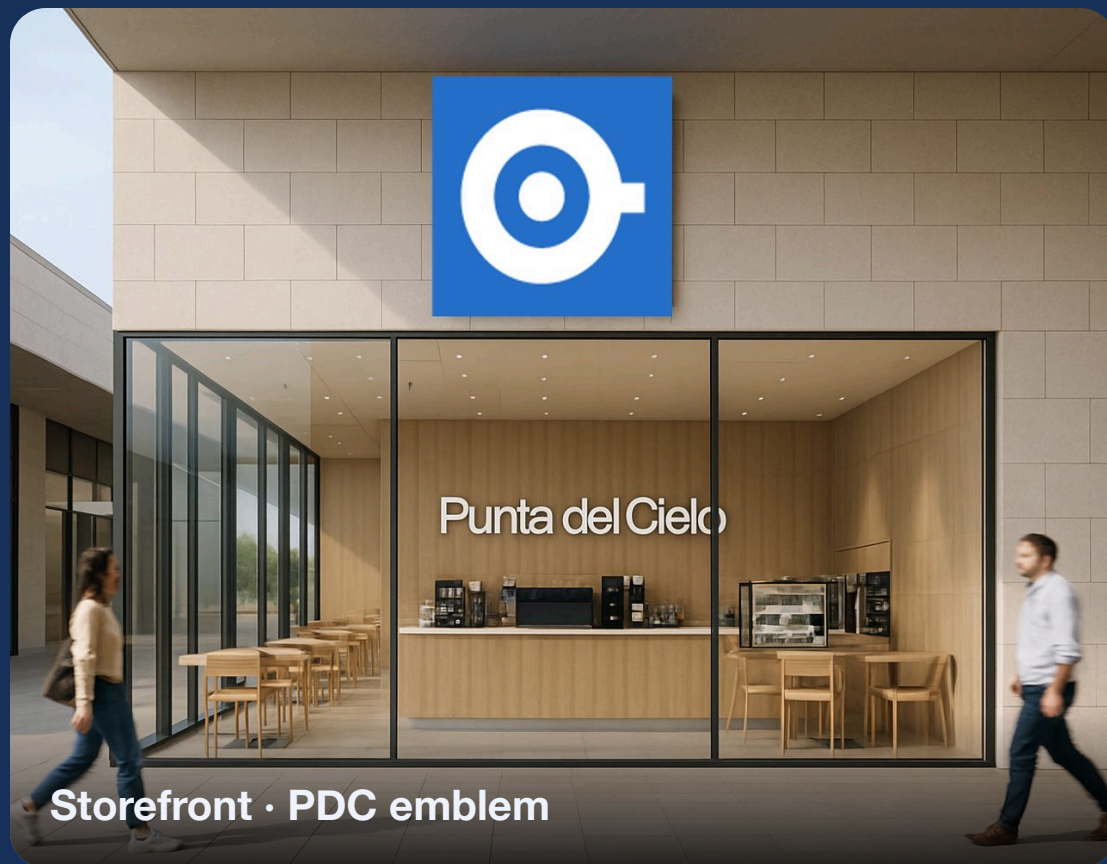
No doors. No barriers.

• MOODBOARD • THE SPACE

Open plan, light, the coffee as the hero. Less, but better.

THE PLACE, WITH INTENTION

Every corner, in its place.





2. FINDING OUR CROWD

Mapping the people who naturally grow from our soil and will enjoy our cups.



SEL DEMOGRAPHICS

AB
C+
C-
D
E



KEY FINDING
 A brand seeking to project a contemporary, aspirational image that inspires...

AGE <10 15 20 25 30 35 40 45 50 55 60 >65

WHY PEOPLE REACH FOR COFFEE

Eleven needstates.

01 Keep me going

02 My mental reset

03 Expressing my lifestyle

04 A place to focus

05 Fueling progress

06 Making others feel
welcome

07 Sharing with people I love

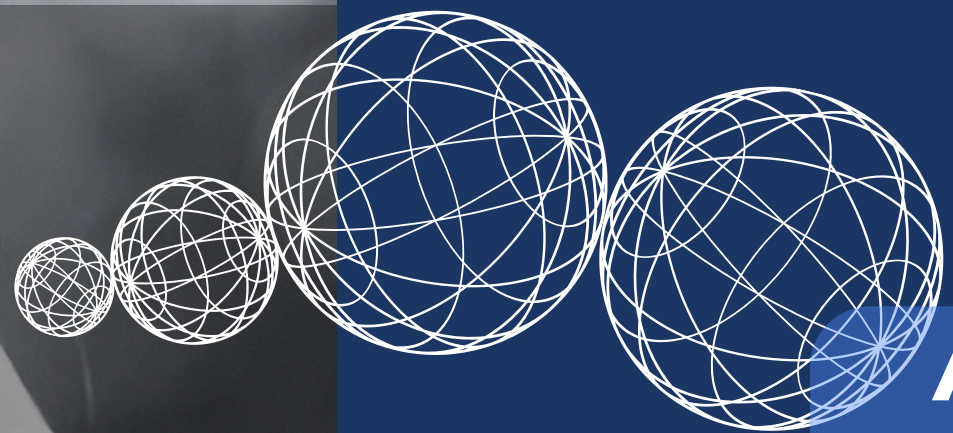
08 I deserve this

09 Starting strong

10 Coffee = meaningful
moments

11 Around the table

Consolidated into **9 behavioral axes** (next slides). Across occasions — **Retail · Shops · Dual**: which fits best?



INDIVIDUAL

ACHIEVERS

CURATORS

EXPLORERS

Keep me going
Starting strong

My mental reset

I deserve this

PERFORM

Expressing my lifestyle

Around the table

FEEL

A place to focus

Sharing with people I love

Making others feel welcome

CONNECTORS

HOSTS

COLLECTIVE

BEHAVIORAL AXES

BREW MODEL BRAND





CROWDS*



ACHIEVERS

forward”

See coffee as a tool to perform, move forward and accomplish more.

PROGRESS



CURATORS

“I seek things made with intention”

Appreciate craftsmanship and thoughtful experiences.

CRAFT



HOSTS

“I love bringing people together”

Create moments that make people feel welcome..

CONNECTION

*This crowds will be used as communication axes

TARGETING

Reach all category buyers — "intention" is the creative axis, not a filter.

• DIRECTIONAL • confirm with focus groups

"Those who live with intention"
= how we talk



Proud-of-Origin • 36%

private advocate → activate

Value/Pragmatic buyer



Price/Value • 33%

"best americano without paying \$80" → penetration

Per Ehrenberg-Bass: grow penetration by reaching everyone. Don't let "intentional" exclude the 33% that drives volume. Brand platform = young-premium-connoisseur (who we are); penetration = recruit the value buyer on price-value (how we grow).



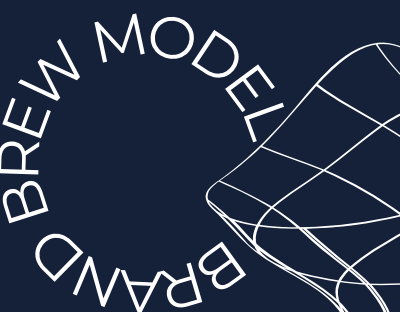
One big Crowd

DESIGN TARGET



**PEOPLE WHO
CHOOSE TO LIVE
WITH INTENTION
INSTEAD OF SIMPLY
GOING THROUGH
THE MOTIONS.**

CAFE PUNTA DEL CIELO EXISTS FOR
“Those who live with intention”

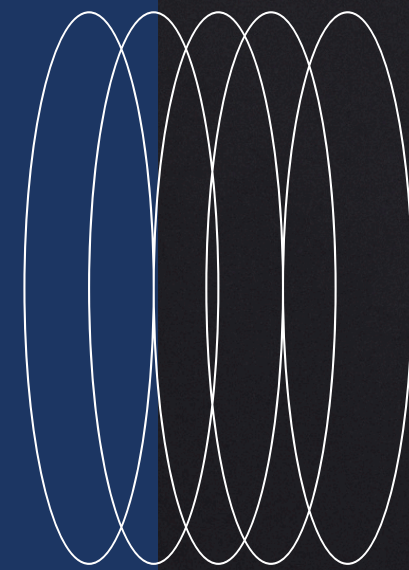


KEY FINDING



“FOR THOSE WHO LIVE WITH INTENTION”

Intentional people don't value things for what they are. They value them for the intention behind their **creation** and the **meaning** they bring into their lives.





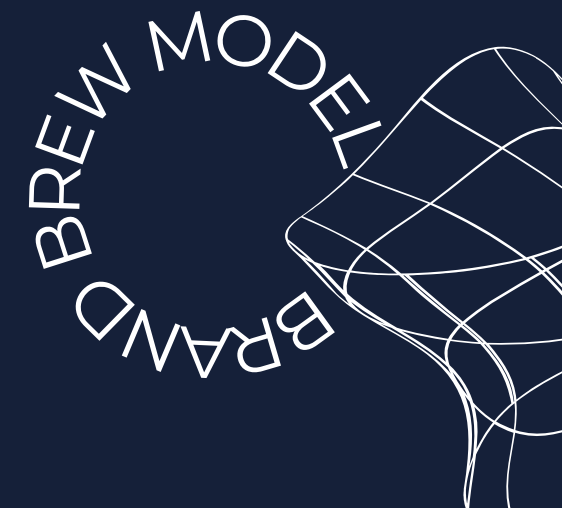
3. FINDING OUR BATTLE

Discover the human need worth brewing for.



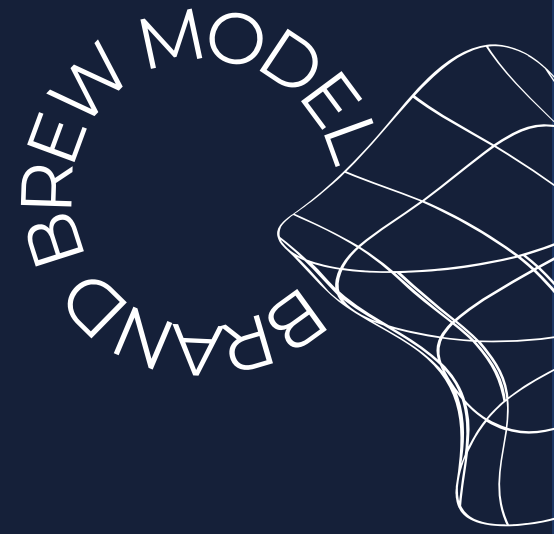
KEY FINDING

Punta del Cielo chooses to compete beyond functional coffee needs, focusing instead on the social and emotional value that coffee creates in people's lives.



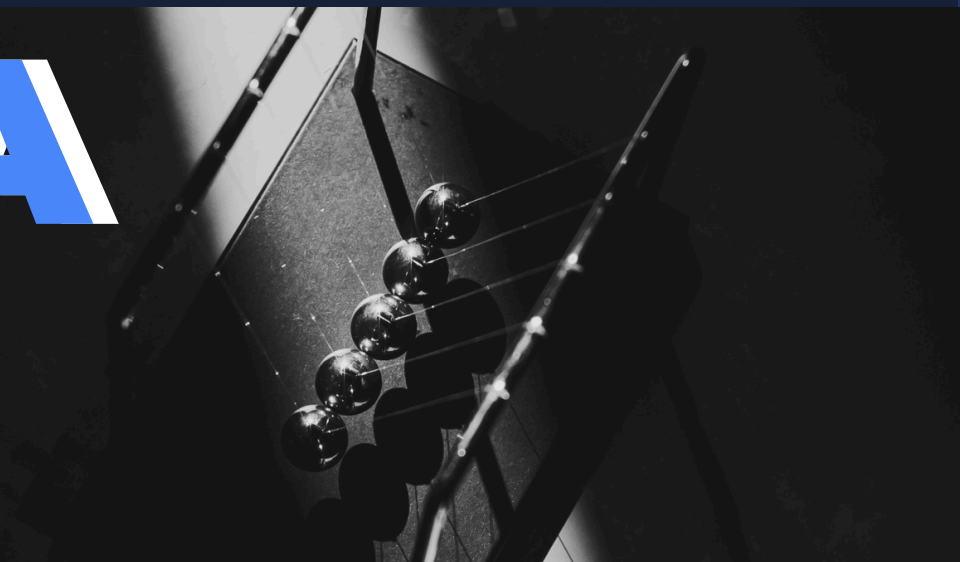


FRICTIONS FOR THOSE WHO LIVE WITH INTENTION...



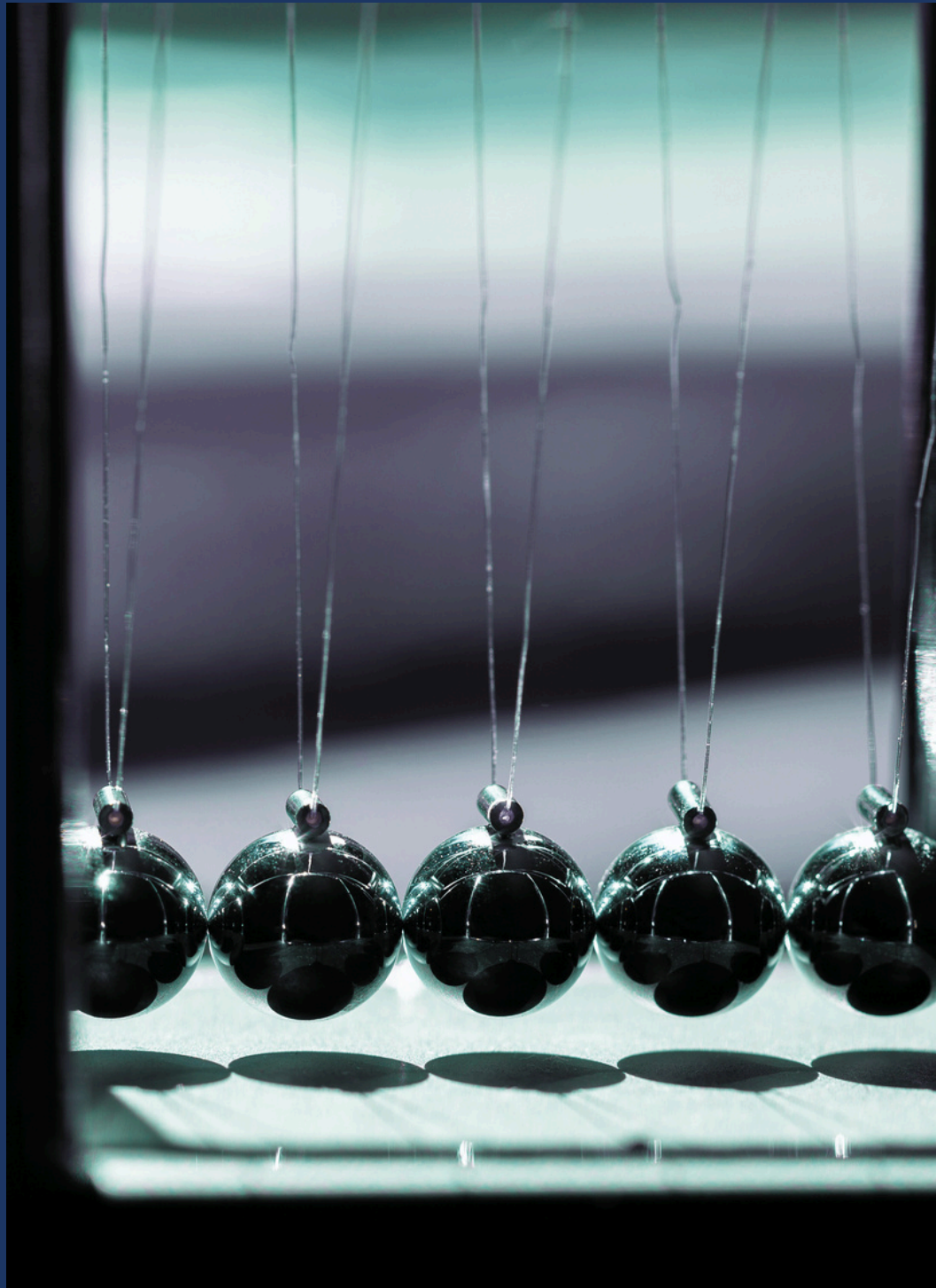
- Good enough has become the new **standard**.
- There is a world that pushes toward **automatic** living.
- We are always making **unconscious choices**.
- Accepting the **ordinary** instead of something better.

I N E R T I A





BRAND BREW MODEL



CHALLENGING THE INERTIA OF THE ORDINARY

Each PDC action, product, innovation must answer this:
Would someone who lives with intention appreciate this?
Are we challenging the ordinary?

OUR BATTLE



4. CRAFTING OUR PROMISE

The value people can expect from us every day.



EL GRAN CAFÉ DE MÉXICO



Point of parity

RIGHT TO PLAY

Expectations Punta del Cielo must consistently deliver to be considered a credible premium coffee

Excellence & consistent cups

High quality Mexican beans

Right portfolio



Coffeeness

Point of difference

RIGHT TO WIN

Qualities that make Punta del Cielo unmistakably different and impossible to replace

Thoughtful Design

Sensory Experience

Mexican Creative Excellence



Intentional Craftmanship

Coffee elevation made with intention...



RIGHT TO WIN, IN ITS PLACE

Quality is already won. Don't bet on it as the differentiator.

• DIRECTIONAL · perception indices

RIGHT TO PLAY (WON)

- Quality / taste — idx 118 (over-delivered)
- Mexican beans, consistent cups
- Sensory design

RIGHT TO WIN (MOVE HERE)

- Distinctiveness / mental availability
- Proposition capital ("proposing PDC = good taste")
- Presence at the moment of choice

"We design coffee with intention" becomes the **vehicle of saliency** — memorable distinctive assets — not abstract meaning. Quality is a Right-to-Play table-stake (parity); distinctiveness is the Right-to-Win.

DISTINCTIVE ASSETS + PRESENCE

Own a handful of assets. Show up everywhere they choose.

DISTINCTIVE BRAND ASSETS

- The blue #2070C0 + the eye/cup mark
- The branded cup · the eye mark
- Applied with discipline on every touchpoint

MENTAL & PHYSICAL AVAILABILITY

- One strong, consistent social account (close the SOV gap)
- Signage + ritual at each entry point
- Be present where the choice happens

Saliency is built with **distinctive assets + availability**, not with purpose alone.

THE EXPERIENCE, WHERE IT'S WON

They can copy the price. They can't copy the experience.

• VERIFIED • ~112 cafés • OOH #2 (11.6%)

• DIRECTIONAL • the redesign to test in field

THE SPACE

- Distinctive, open design — coffee as the hero
- A third place, not a counter

THE RITUAL

- Barista + prep in full view
- The branded cup as a distinctive asset

THE HUMAN MOMENT

- Recognition and warmth
- The opposite of a transactional kiosk

Andatti is transactional (OXXO, ~28 cups/day); Caffenio is drive-thru speed. Neither owns the **experience** — the space, the ritual, the human moment — across three occasions: **morning-on-the-go • afternoon work • the social table.** That is PDC's defensible OOH territory.

CALIBRATED TO THE BIA BRAND AUDIT 2020 (N=848)

Taste wins. Price is a co-driver. Origin barely moves it.

• VERIFIED · BIA Brand Audit 2020 (TN 20282, n=848, CDMX/MTY/GDL)

CHOICE DRIVERS (WEIGHT)

- Sensory quality (taste + aroma) — **38**
- Price / value — **26**
- Convenience / availability — **18**
- Ambiance — **12** (modeled)
- Origin "de aquí" — **6** (absent from BIA top-8)

THE READ

- The win is **premium-asequible**, proven on taste
- Origin looks weak in 2020/home data — but specific **altura**-origin in OOH is untested (hypothesis B)
- BIA halo: PDC reads "**young**" (**17, highest of the set**)

Limitation: BIA Audit is 2020 + general coffee (home), not OOH-premium 2025 — confirms drivers — a RETAIL/home proxy, to revalidate in OOH field. Weights 1–3 are BIA-measured; ambiance & origin are modeled inferences.

THE TERRITORY ISN'T A DESK DECISION — THE CONJOINT PICKS

Two candidate territories. One to win.

• DIRECTIONAL · to test in field

A · YOUNG-PREMIUM-CONNOISSEUR

- From the BIA halo (young 17) — but measured vs **retail** brands, not Cielito/TG
- Risk: Cielito is already young; Tierra Garat is already connoisseur

B · MEXICAN ALTURA — ACCESSIBLE, UNPRETENTIOUS

- Origin as the **wedge**: TG is solemn, Cielito has no origin, Starbucks is global
- Leverages PDC's real altura asset — desacralized + affordable

Premium-asequible is the price strategy in BOTH. **Working lead today: B (altura mexicana accesible)** — the wedge Cielito/TG can't own. The conjoint confirms A vs B before we commit; we don't bet blind.

HOW IT HOLDS · WHAT TO CONFIRM

The territory is the field's call. Taste proves it. The eye flags it.

BRAND MANTRA (INTERNAL)

- Candidate A: joven-premium · Candidate B: altura accesible
- A decision filter — never the copy

VALIDATE BEFORE BUDGET

- Conjoint $n \geq 300$ (2025 OOH): weights + price ceiling
- Blind asset test: confirm the eye icon
- Refresh the 2020 BIA read for OOH-premium

VERIFIED today: drivers, halo, awareness, shares (BIA $n=848$ + Euromonitor). DIRECTIONAL: café economics + trade-up pocket — field confirms.

• DIRECTIONAL



COFFEENESS



The essence of everything that makes coffee worth experiencing, from its aroma and flavor to the emotions, rituals and connections it inspires.

CRAFTSMANSHIP



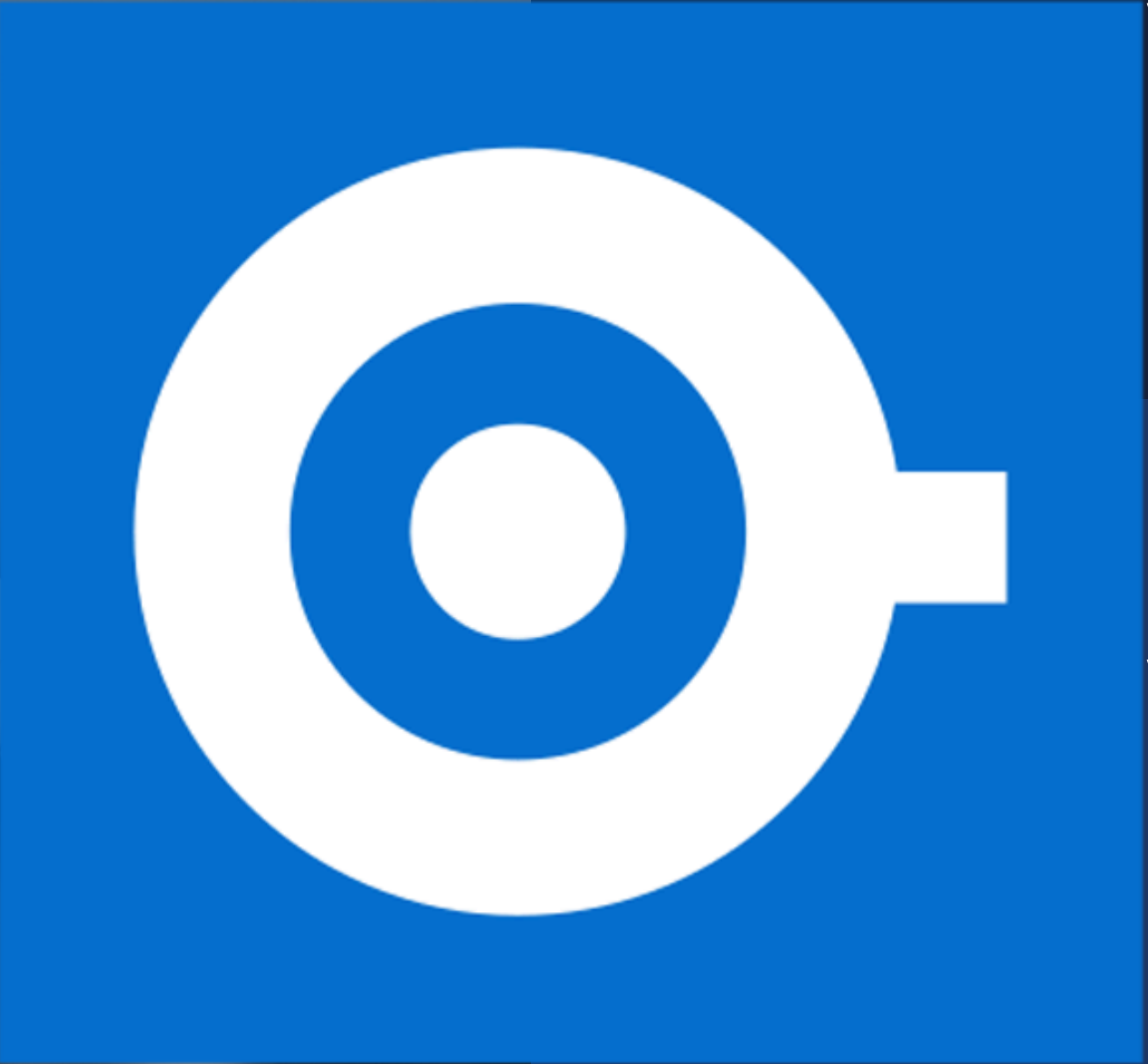
The belief that every detail deserves intention, care and purpose to create something truly worth appreciating.



Our promise:



CRAFTSMANSHIP



**WE
DESIGN
COFFEE
WITH
INTENTION**



BRAND MODEL
BRAND MODEL

Café Punta del Cielo®



5. DEFINING OUR PURPOSE

The impact we hope to create beyond the products we sell and the promises we keep.



CULTURAL INSIGHT

Life is becoming increasingly automatic, leaving us less present for what truly matters.

CATEGORY INSIGHT

Coffee doesn't create meaningful moments. It creates the presence that allows people to experience them.



WHY WE EXIST?

BRAND BELIEF

Every coffee experience deserves to be designed* with intention.

*New Mexican creative design





DEFINING OUR PURPOSE



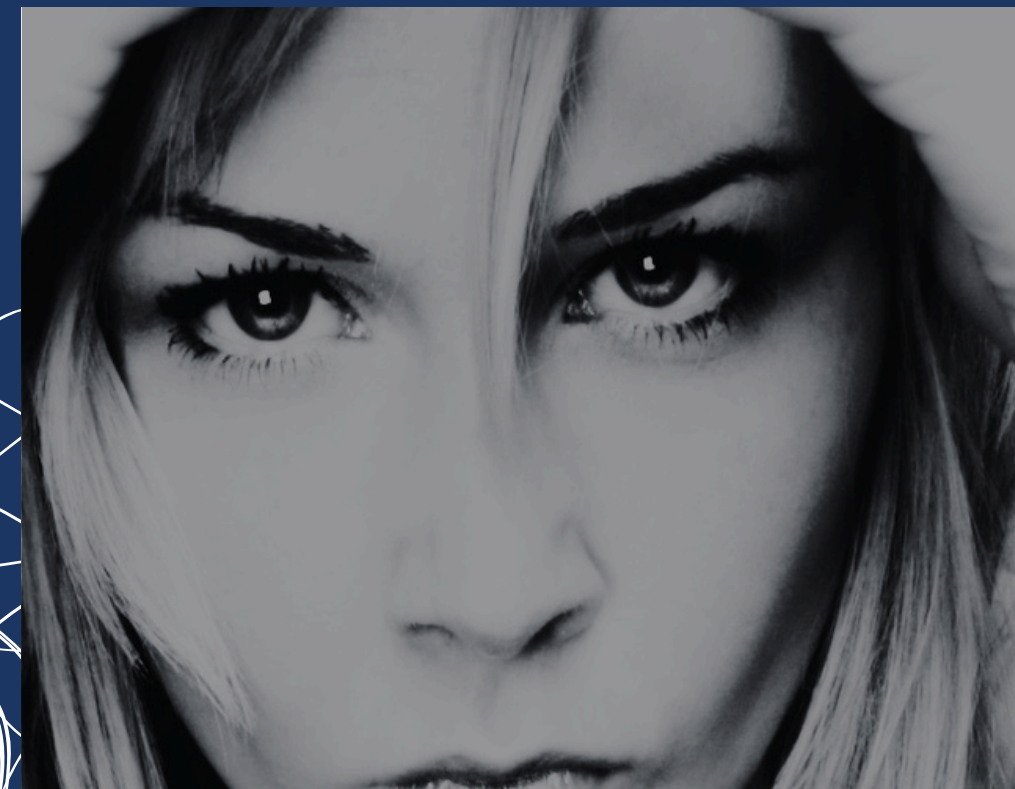
**RESTORING
PRESENCE
FOR A MORE
MEANINGFUL
LIFE**



BREW MODEL
BRAND



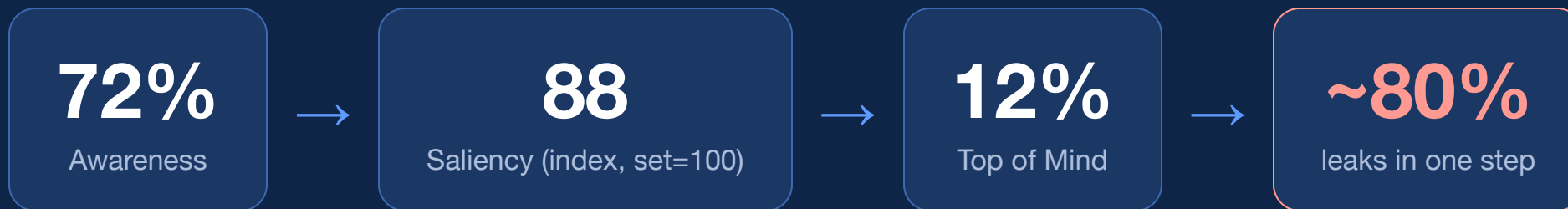
**Coffee creates
presence.
Design creates
meaning.**



"PRESENCE", THE OTHER MEANING

We have the coffee. Not the recall.

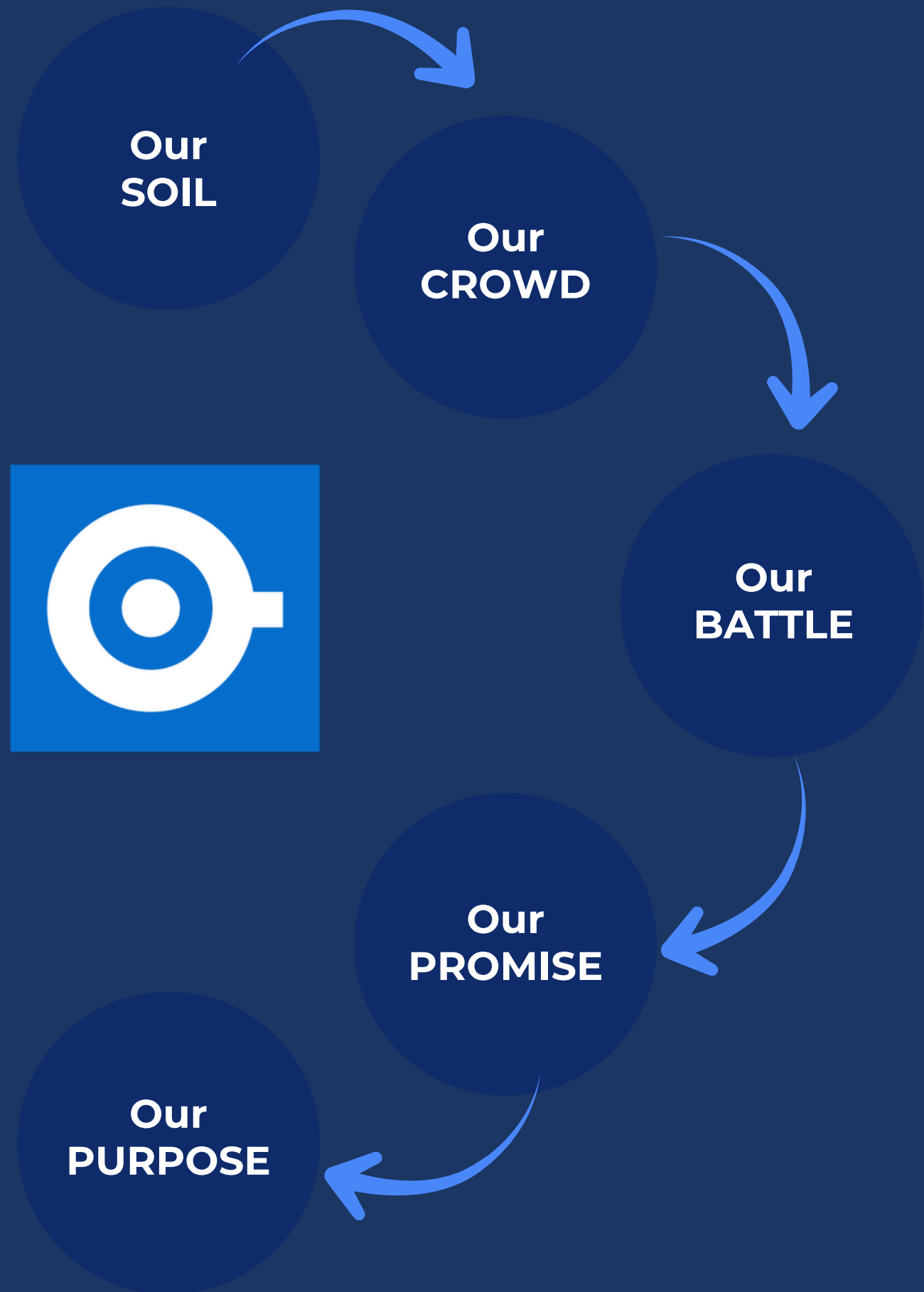
• DIRECTIONAL • perception funnel



• VERIFIED Digital SOV: **29K IG followers vs Cielito 74K**. The deficit is saliency/distribution — not meaning.



**BRAND
NARRATIVE
SO FAR...**

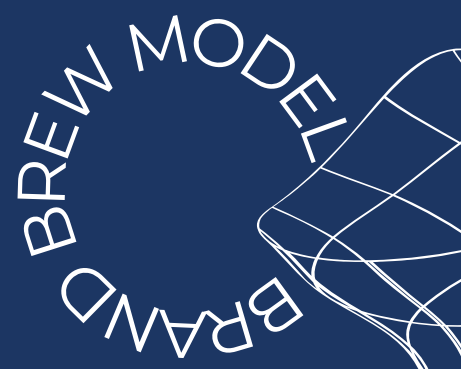


Punta del Cielo belongs to a new generation of Mexican brands redefining excellence through creativity, craftsmanship, and intention.

We exist for people who choose to live intentionally and refuse to settle for automatic ways of living. Because the inertia of the ordinary makes us overlook what truly matters.

We design coffee experiences with intention that restore presence to everyday life.

Because the best moments in life deserve to be fully experienced.



Narrative adjustment: from attributes to meaning



BRAND BOOK

How can we make PDC be perceived as a better brand?

Premium Coffee

Mexican Origin

Product experience

Brand Assets

BRAND BREW

Why should PDC exist in people's lives?

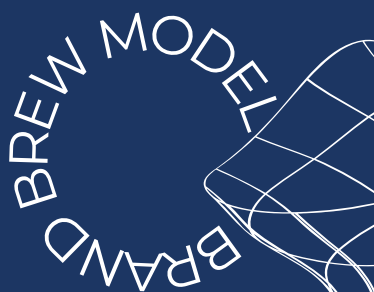
Meaningful Coffee

New Mexican excellence

Intentional design

Brand Philosophy

**Connecting attributes with a meaning
we can stand for and appropriate**





6. BREWING OUR BRAND

How people will feel the brand experience

PACKAGED COFFEE — A SECONDARY OPPORTUNITY THE CAFÉ FEEDS

Retail is adjacent — not the battlefield.

• VERIFIED · Euromonitor / BIA 2020 (home)

WHERE PDC STANDS (RETAIL)

- Retail share **0.4%** vs Nestlé 55% — NOT a frontal battle
- Ground coffee at home = proven strength: **62% aware, #3 preferred** (BIA 2020, home)

THE SELECTIVE PLAY

- **Nespresso-compatible capsules** — the at-home premium pocket (\$221M, Nespresso 71%)
- Sell inside the cafés + D2C / subscription — the café showcase feeds it; no mass shelf

Channel rule: this is RETAIL (en casa), distinct from the café (OOH) core. The café is the engine; retail is the extension.

WHAT GOOD LOOKS LIKE • 12 MONTHS

If it works, these numbers move.

TOM 12% → 20%

Top-of-mind recall in the set

P4W penetration +

More buyers (penetration > loyalty)

SOV 29K → close gap

Social share of voice vs leaders

Proposed targets to lock with the team — **• DIRECTIONAL**. Targets illustrative, not commitments. Business KPIs to track: same-store sales, avg ticket, food attach, transactions/day, unit payback — baselines set in field.

WHAT WE NEED FROM YOU

Direction is solid. The field confirms the magnitude.

We ask to **approve the field phase**: focus groups by occasion + conjoint ($n \geq 300$) — to lock segment sizes, pricing and saliency baselines, the premium-asequible price ceiling and the saliency baseline. Phase ~6-8 weeks; it unlocks the brand + distribution investment decision once they confirm. (Study budget: order-of-magnitude tens of thousands USD — vendor to quote.) Cost of NOT acting: Caffenio's FEMSA-backed national window (24–36m). The field phase also delivers a unit-economics model + a low-rent morning-format pilot + the A/B territory test — not just focus groups.

Directional to steer; field to decide. Verified today: market, shares, locations, SOV, FEMSA control, real reviews.