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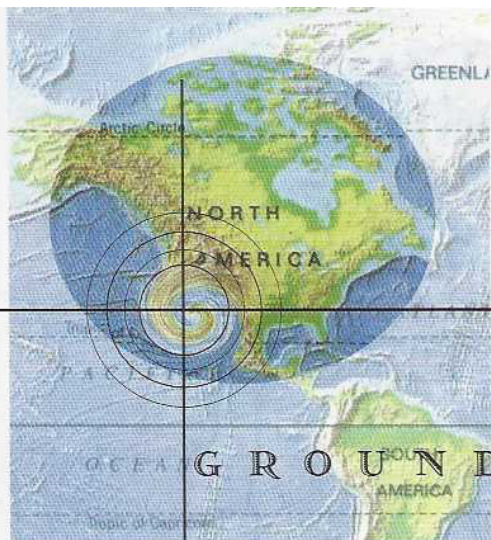
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Coffee's Third Wave



BY TIMOTHY J. CASTLE AND CHRISTOPHER M. LEE

O C E A N G R O U N D Z E R O

The Coming Third Wave of Coffee Shops

WHEN LOOKING AT THE HISTORY of specialty coffee, a pattern emerges with respect to the types of entrepreneurs and businesses involved. We call this “the three waves of specialty coffee.” The first wave took place from the late 1960s to early 1980s and featured quality obsessed entrepreneurs dedicated to providing an alternative to the large institutional roasters of that time. Because they were the pioneers, these “first wavers” faced little competition. Naturally, business skills were secondary and not as critical in this stage because the product sold well in an uncrowded market. As their businesses grew, some first wavers added to their skill sets and flourished. The ones who did not, eventually failed.

By the early and mid-1980s, business-savvy entrepreneurs realized the potential of specialty coffee. While the first wave featured passionate coffee aficionados becoming entrepreneurs, the second wave featured individuals with business acumen that was complimented by an affinity for coffee. While the value of their companies soared, first wavers sold out to this new crew as the field became more crowded and riskier. The original Starbucks was a

There is a new generation of coffee entrepreneurs ready to take the specialty coffee industry to the next level.

successful first waver. When Starbucks was sold to Howard Schultz it became the quintessential second waver. Characterized by the Starbucks tsunami, the second wave brought in a crowd of business-oriented roasters, of all sizes, who viewed specialty coffee as the next big thing. Many did not see the importance remaining steadfastly focused on quality when competition demanded leaner businesses, cost-efficient operations, and increased investment in brand and marketing.

The third wave, beginning in the 1990s, features young, quality-committed business people who believe that second wavers offer little more than institutional coffee dressed up as specialty coffee. Third-wavers understand the business mistakes of the first-wavers, denounce many second-wavers for failing to live up to the quality commitment of the first-wavers, and believe they can avoid both of these

pitfalls. From the perspective of this new wave, first-wavers did not have a business design and paid a dear price for it; second-wavers, on the other hand, compromised their original business design by failing to place standards of quality at the forefront of their competitive strategies. While they are entering a highly competitive market, third wavers place quality at the center of their competitive strategies and core competencies. It may limit their expansion potential, but they are being realistic in understanding that the expansion battle was a fight for real estate and is one that must already be conceded to the big players, most notably Starbucks.

For ardent coffee lovers and the venerable veterans of the specialty industry, hope for the future resides in three areas. First are the third wavers that are coming up now, second wavers who fight their investors and CFO's to stay focused on quality, and the first wavers who are still with us in some semblance of their original approach to quality.

Regardless of any differences in business philosophy between second- and third-wavers, the emergence of a younger generation of quality-focused

coffee entrepreneurs and industry leaders is promising news for the industry. Many of these third wavers have structured and financed their businesses in such ways that allow them to obsess over coffee quality. That is to say, third wavers have not brought in outside investors, and some claim that this has been the key to their success. But again, on the other hand, the big play for investment dollars has already been made and the commitment to quality may be as much savvy niche marketing as it is passion for the best coffee possible.

Mike Prins and Mike McConnell founded Seattle-based Caffè Vita five and a half years ago after growing increasingly discontent with the rapidly growing coffee chains (i.e. the second wavers) that had compromised espresso quality in the process of creating wealth for shareholders. As Prins explains, "We simply felt that there were no coffee companies in Seattle

focusing solely on quality." In the self-proclaimed coffee capital of the world, a simple "quality above all else" approach has proven profitable for the two industry veterans, evidenced by annual 100% sales increases through their first five years. With three stores in Seattle and 400 wholesale accounts, McConnell and Prins have gained a reputation for quality. "We believe that if you truly have a better product, in the long run people will hear about it," says Prins. "We have stayed successful by not trying to be all things to all people. We know our strengths."

To the casual onlooker, the Caffè Vita approach to training may look like a money-draining exercise, rather than the most worthwhile investment in the brand. McConnell, who runs the wholesale business, would rather forego a sale if a customer is unwilling to go through the Caffè Vita espresso training than risk seeing their coffee ruined at the hands of untrained baristas. Caffè Vita's training is anything but a one-hour refresher course.

Depending on the prior espresso knowledge of his customers, McConnell and his customer service team may spend anywhere from 6 to 20 hours training wholesale customers.

For McConnell and Prins, the desire to perfect their craft and serve the highest quality espresso, no matter what it requires, is the overarching philosophy that dictates business decisions. Since there is no disagreement that this principle is valued above all else, decisions regarding business strategy and tactics are clear. "Putting their money where their mouth is" means devoting an extraordinary amount of time and resources to training, and buying the best green coffee, regardless of price. McConnell and Prins feel fortunate not to have to answer to investors, who may see little economic sense in such large investments in training after wholesale accounts are opened, and who are unwilling to sacrifice sales volume in order to execute a strategy based on quality.

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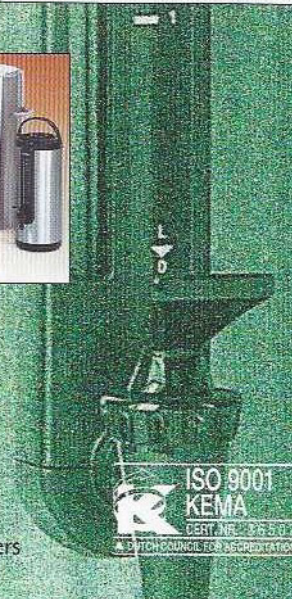
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The Vivace Roasteria in Seattle. David and Billy Kenny of Bewbys confer behind the bar.

"Ultimately, you have to be passionate about coffee," says McConnell. "Coffee needs to be taken seriously. It is a culinary art, and should be treated as such." As owners, they realize they have the prerogative to pursue that passion. That is the advantage and logic of staying small, and it is this

belief that characterizes many successful third wavers.

Espresso Vivace

David Schomer, another preeminent third waver, founded Espresso Vivace in Seattle in 1988. His modest enterprise took the form of a single espresso

cart that he had purchased for \$10,000. Since then, Espresso Vivace has expanded to two stores, and, much to the chagrin of potential investors, this is the size Espresso Vivace will stay. "There is a limit to size," says Schomer. "I simply cannot get more than 28 people excited about our charter. I am not happy unless the coffee is truly beautiful."

Espresso Vivace's core competency is the ability to develop and execute espresso preparation methods that lead to superior-quality espresso. If an activity or business opportunity does not involve that goal, Espresso Vivace is not interested in pursuing it. This intense, single-minded focus is a curse to investors because it limits a company's customer base, but it is essential to the success of third wave entrepreneurs.

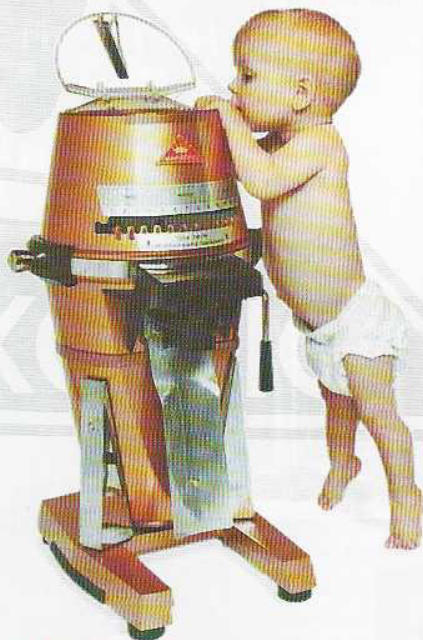
Schomer was, however, able to create an additional revenue stream without going outside of Espresso Vivace's core competency by publishing a book demonstrating the espresso preparation techniques that he and his staff had developed through years of research and trial and error. "Educating competitors has actually created a name for the teacher," says Schomer. "I hope that the reputation Espresso Vivace has gained will carry us through any difficult times we may face in the future."

Schomer expresses regret at the fact that many players in the coffee industry chose to pursue success through the multi-unit and franchise model of fast food restaurants, rather than high-end restaurant model, which features a single unit with extraordinary quality and fastidious attention to detail. "Many fine restaurants have had the business sense to stay small," says Schomer. "My focus is to build a legendary name through quality." Schomer believes that staying small is the only way to do that.

Why are there so few successful third wavers? Schomer believes that it is because entrepreneurs must have both the passion for coffee and the ability to manage. "Generally, the passionate people don't have the skills,

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and the people with the skills don't have the passion," says Schomer. "Even if an entrepreneur has the whole package, then he or she is likely to be seduced by the promise of a lot of money. There are too many lures, and if you're good in this business, there is much temptation to bite on those lures."

How one defines quality may ultimately determine the extent to which one believes that certain levels of growth are feasible. For many third wavers, the key to quality is fostering an environment and culture that instills passion for coffee. An underlying norm of the culture is to adhere to meticulous techniques for the sake of exquisite quality, and the belief that profits are worthwhile only if they are achieved by selling a product that meets one's own highest quality standards. For many successful third wavers, this culture can only be maintained in a small company. Thus, in order for third wavers to stay true to their beliefs about a quality-oriented business, they must stay small. Ultimately, it is clear that their passion for quality coffee drives all the business decisions, and their business savvy allows them to

integrate their passion as an integral part of their business design. If one is truly passionate about a great cup of coffee, then surely one must be hopeful that third wavers represent the future of specialty coffee.

While two examples of the "third wave" theory were interviewed for this article, many more could have been. Café Zoka, also in Seattle, for example, is another which is staking out a claim to their piece of the quality pie in the Pacific Northwest, an area where it would intuitively seem improbable that even one roaster could make it against other, more well-established coffee retailers and espresso based drink businesses. Up and down the west coast many small- to medium-sized roasters grow and flourish despite what seems to be an unstoppable juggernaut of chain expansion and brand dominance in market after market. The key to third waver survival seems to be exceeding level of service and quality that consumers have come to expect from the larger chains — and staying in business long enough for a few customers to finding out. ☉

TEA: Making its Mark : Continued from page 27

们的公关宣传，对当地名人的宣传介绍搞得极为成功，津巴布韦卫生部长很支持我们，西班牙卡塔洛尼亚（大区）卫生部长也很支持我们，在爪哇，省长对整个项目予以了支持。”试销前后进行的研究表明，消费者对茶叶保健功能的了解有极大增加。试销前，捷克有22%的母亲知道茶是保健饮料，试销后该比例上升到32%。在西班牙卡塔洛尼亚大区，尽管其它饮料经销商进行了激烈竞争，经过试销引入茶叶标志，1/14的母亲都知道茶有保健影响，在试销前这个比例是1/50。在津巴布韦，试销运动搞完后，52%的被调查者可以认出茶叶标志。

在推出茶叶标志进行试销后，反响极好，尤其是在津巴布韦及捷克，刘易斯为此又惊又喜。他正努力推动在以上两国继续投资，把推广运动继续搞下去。他认为这将向其它国家及其茶商充分展示这一运动的潜力。以上两国的茶商也对运动的成果感到高兴，并愿参与投资继续搞下去，外国投入多少资金，他们也投入多少。

但刘易斯提醒说，尽管效果良好，但该运动的范围、资金都有限，因此仅仅通过购买者的行为来判断效果，尚难以知道人们对茶叶的长期看法是否已有重大改变。“低水平的支出不会在近期影响消费行为，在我们试销这一阶段肯定不会——试销的东西应该是将来人们买得起的东西。因此，我们应该用行为以外

的其它衡量标准来估价成功的程度。期望是人们观念转变之后，从中到长期看，会导致茶叶消费量的增加”。

现在剩下的事只是让茶叶界确信：值得投资于改革茶叶包装，并通过许可证安排茶叶标志，这个标志的版权属于联合国粮农组织，计划让尽可能多的生产商获得许可证使用它。但要使他们确信是另一回事。就是说先让他们同意这是个好主意，然后再照着去做。尽管许多小茶叶公司很愿意用这个标志，但一些大公司不太愿意参与此事，他们说品牌识别是个困难。还有人提出，从保健饮料角度推销茶叶是否是增加消费的正确办法。

但既然无人有更好的办法，而茶叶可保健的证据仍源源出现，且对茶叶有利，所以对于提高茶叶消费量来说，采用茶叶标志至少是个办法。现在的问题就是如何为了茶叶界的利益而将此事干起来。刘易斯说：“这个标志必须是一个精心拟定的计划的一部分，形成一个前后一致的，受控制的宣传运动，后面有专业网络给予支持。茶叶界有决心和力量利用好这一机会吗？茶叶界是否有足够的决心投资一部分钱，来确保这些计划得到适当支持？”

刘易斯正推动茶叶界全力支持茶叶标志，如果不是为了消费者的健康，也是为了茶叶界的持续健康发展。

美国咖啡店的第三次浪潮

Timothy J. Castle 和 Christopher M. Lee 文

新一代咖啡企业家准备把特种咖啡业提高到一个新水平

翻开特种咖啡的历史，企业家的类型和他们的经营特点已经形成了一种整体模式展现在我们面前，我们将其称作“特种咖啡业的三次浪潮”。第一次浪潮发生在二十世纪 60 年代后期到 80 年代初期，其特点是：被质量困扰的企业家竭尽全力为当时的大批的烘烤商提供可选择方案。因为“第一次冲浪者”是开拓者，所以他们遇到的竞争几乎为零。当然，那时的商业手段还处于从属地位，不象现阶段这样重要，当时的商品市场并不显得拥挤。但是，随着业务的发展，一些第一次冲浪者增加了他们的技术含量，开始发达起来，而未增加技术含量者只能宣告失败。

到二十世纪八十年代的早期和中期，对商业极具领悟力的企业家们意识到了特种咖啡的潜力。如果说第一次浪潮的特点是狂热的咖啡爱好者变成了企业家。那么，第二次浪潮则强调从业者的经营魅力与咖啡的亲力努力结合。当这些公司的价值开始上升，市场变得更加拥挤和危险时，第一批冲浪者已经把他们的产业卖给了第二批新来者，早先的星巴克就是第一批冲浪者中的成功典型。当星巴克被卖给霍华德·舒尔茨时，后者已作为第二批冲浪者加入市场。由星巴克掀起的第二次浪潮导致业界出现了大批烘烤型咖啡，这些人把特种咖啡看作是一件大事，但在竞争要求精简商业机构、提高经营效率、降低经营成本时，许多人在商标和销售方面增加投资，却未看到坚持不懈地注重质量的重要性。

第三次浪潮始于 90 年代初，这次浪潮的主体是年轻的、讲求质量的商人。第三次冲浪者批评第一批冲浪者的商业错误，谴责许多第二批冲浪者不能贯彻第一次冲浪者的质量方针，他们自称可以避免上述两种错误。按照他们的观点，第一批冲浪者没有进行商业设计且没有制订出一个具有亲和力的价格。另一方面，第二批冲浪者没有把质量标准放在他们竞争战略的最前列。当他们进入高度竞争市场时，第三次冲浪者把质量放在他们竞争战略和核心资产的中心位置。这样做可能会限制他们扩展的潜力，但是，他们懂得扩张的斗争是为不动产而战斗，否则只能向对手作出让步，就象星巴克这样的大玩家。

对于执着的咖啡爱好者和特种咖啡业的值得尊敬的拓荒者，未来的希望将在三个部分：第一是现在已

经跟上步伐的第三批冲浪者，第二批冲浪者正在和他们的投资者和首席财政官就继续注重质量的问题而斗争，而第一批冲浪者，尽管他们还和我们在一起，从外表上看好象仍保持他们原先注重质量的态度。

不管第二次冲浪者和第三次冲浪者之间商业哲学的区别有多大，近几年出现的新一代咖啡企业家和工业领导者还是给咖啡业带来了希望。第三批冲浪者中的许多人在组织生产和企业经营的同时，更注重咖啡质量问题。第三批冲浪者没有引进外界的投资，有的人说这是成功的关键，但是在另一方面，美元投资的大规模运作已经开始。对质量的许诺像对优质咖啡的追求一样，可以产生良好的销售效果。

韦塔咖啡公司(Caffe Vita)

迅速增长的咖啡连锁经营（即第二次冲浪者）在为股东创造财富的过程中忽视了咖啡质量的追求，人们对这种情况日益不满。基于这种情况，麦克·普林斯（Mike Prins）和迈克·麦科奈尔（Mike McConnell）于 5 年前在西雅图建立了韦塔咖啡公司。普林斯解释说：“我们感到在西雅图没有真正注重质量的咖啡公司”。

在自称是世界“咖啡之都”的西雅图，简单朴实的“质量至上”的方法对两位行家里手来说证明是有利可图的。在第一个 5 年内，年销售量增加了 100%。通过西雅图的三个商店和 400 个批发商，麦科奈尔和普林斯获得了质量信誉。普林斯说：“我们相信如果你真正有较好的产品，它总是会被人知道的”，“我们成功的原因是我们不追求能满足所有人要求的东西，我们知道我们的力量所在。”

对于旁观者来说，韦塔公司的训练方法是：宁愿花钱训练，不愿花很多精力在品牌上投资。如果顾客不愿通过韦塔咖啡公司的训练，麦科奈尔（经营批发贸易）宁愿放弃销售，而不愿冒险看着咖啡毁于未经培训的咖啡调制师之手，韦塔咖啡公司的培训决不是一小时的介绍课程。根据顾客原先的咖啡知识，麦科奈尔及顾客服务队可在任何地方对顾客进行从 6 小时到 20 小时不等的培训。

对于麦科奈尔和普林斯来说，无论出现什么情况，希望完善他们的技艺和供应最高质量的咖啡是指引他们商业决策的中心哲学。因为质量至上的原则没

有异意，因此，关于商业战略和战术的决策也就很明显了。“把钱放在嘴上”，这意味着花费特别数量的时间和财力进行培训，购买最好的绿色咖啡，而不管其价格如何。麦科奈尔和普林斯感到幸运的是：他们没有按照投资者的要求办事。对投资者来说，他们认为在批发帐目开户以后，在培训上进行大量投资，只能获得很少的经济利益，因此，他们不愿为执行质量战略而损失销售数量。

麦科奈尔说：“最后你必须对于咖啡怀有热情，咖啡需要认真对待，这是一种烹调艺术，理应如此”。作为业主，他们认识到他们有权利寻求这种热情。这就是保持小型化的优点和逻辑性。这种看法可以看作是第三次成功冲浪者的特点。

长存咖啡公司 (Espresso Vivace)

大卫·绍梅尔 (David Schomer) 是另一个杰出的第三次冲浪者。他于 1988 年在西雅图建立了长存咖啡公司，他的企业采取用 10000 美元购买的专门咖啡车的最简朴的方式。从那以后，长存咖啡公司开了两家分店。使潜在投资者懊丧的是，长存咖啡公司不准备再扩大规模。“规模是很有限的”，绍梅尔说：“我能使他们对我的计划感兴趣的人不超过 28 个。如果咖啡不是真正的好，我是不高兴的。”

长存咖啡公司的主要能力就是能够创造出新的咖啡制造方法。因为利用这种方法可以生产优质咖啡。如果活动和商业机会不包括上述目的，长存咖啡公司则不想利用这种机会。这种认真而真诚的专注精神对投资者来说是一种灾祸，因为它限制了公司顾客的基础，但是，对于第三次冲浪的企业家来说，则是成功的关键。

但是，绍梅尔可以在不超过长存咖啡公司经营的主要范围之外，开创别的收入渠道，其方法是：出版书籍，介绍他和他的职员们多年研究，经过无数次尝试和失败所取得的咖啡制作技术。绍梅尔说：“教育竞争者实际上为老师扬了名，我希望长存咖啡公司获得的声誉将引导我们克服未来遇到的任何困难”。

绍梅尔表示遗憾的是：咖啡工业中的许多竞争者宁愿选择快餐店的多样性和特许的方式取得成功，而不愿采用讲究质量和细节的高档餐馆单一式取得成功。绍梅尔说：“许多优质餐馆都有一种小型商业观念”。他的重点是：通过质量建立传奇的美名。绍梅尔认为保持小型是获得美名的唯一方法。

为什么第三次冲浪的成功者如此少？绍梅尔认为，企业家不但要有对咖啡的热情，而且必须有管理能力。一般说来，热情的人没有技术，而有技术的人没有热情，绍梅尔说：“即使企业被全部包装起来，他或她仍有可能受巨资的诱惑。在世界上诱饵太多，如果你生意做得好，就会有很多诱惑引诱你去咬诱

饵”。

一个人对质量的解释方式可以最后决定一个人某种增长水平可以达到的程度。对于许多第三次冲浪者来说，追求质量的关键，是要培养出一种特殊的咖啡文化。为了能获得高质量，必须注重新技术的应用，最终出售那些被认为是最高质量标准的产品。对于许多成功的第三次冲浪者来说，这种文化只能保持在小公司中，因此，为了使第三次冲浪者坚持注重商业质量的信仰，必须保持自己公司的小型化。最后，很清楚，他们对商业质量的热情推动着多种商业决策，他们的商业见识允许他们把热情结合，成为他们的商业设计的不可分割的一部分。如果一个人真正对咖啡有热情，那么他肯定希望第三次冲浪者能实现自己的愿望。

本文讲了与第三次浪潮理论有关的两个例子，很可能还有许多别的例子，在西雅图的佐佳咖啡公司 (Café Zoka) 就是另一个例证，该公司位于太平洋西北部，它坚持注重产品的质量。从直观上看，在太平洋西北部烘烤者好像还不可能利用它来反对其它比较固定的咖啡零售者和以咖啡为基础的饮业。尽管连锁的扩展和商标统治市场已成为不可抗拒的力量，但是，西部海岸的许多中、小型烘烤者的经营额却仍在增长。第三次冲浪者的种种做法，好像是超过了消费者所期待的标准水平，但他们会坚持下去，直到消费者能够理解的那一天为止。



The Vivace Roasteria in Seattle: David and Billy Kenny of Bewbys confer behind the bar.