Competitor Snapshot: Berlin specialty coffee roasting

SAMPLE — NOT A PAYING CUSTOMER. Produced by Plenty v0 as a demonstration of the "Competitor Snapshot" offer. The client below is a *fictional example*; the three competitors and all their facts are real and cited. No money changed hands.

- **Example client (fictional):** a small independent specialty coffee roaster in Berlin-Neukölln selling 250 g bags online, at markets and to a handful of cafés.
- **Question:** how do the best-known Berlin roasters price and position themselves, and where is the gap for a small newcomer?
- **Competitors covered (3):** THE BARN, Bonanza Coffee Roasters, Five Elephant.
- **Research date:** 1 November 2026. All prices are as displayed on the competitors' own websites that day (EUR, consumer prices). Prices change; re-check before acting.

Executive Summary

All three competitors are established Berlin roasters with their own café networks, online shops and subscriptions, so a newcomer cannot win on "Berlin specialty coffee" alone. Entry-level 250 g bags cluster tightly: THE BARN's Atlas at €13.90 [3], Bonanza's Dark Roast at €13.90 and Bonanza Blend at €14.90 [8][11], and Five Elephant's House coffees at €12.50 [14]. Single origins mostly run from about €15.50 to €26.50 per 250 g [11][14]. Subscriptions are the main repeat-purchase tool, but each one comes with a catch: THE BARN's lowest monthly price requires a 12-month commitment [3][4], and Five Elephant's has a two-month minimum [15]. None of the three publishes a wholesale price list online [12][16][17]. The best opening for a small roaster is to be the **simple, local, no-commitment option**: a house coffee priced inside the €12.50–€14.90 band [3][8][14], a cancel-anytime subscription, free pickup in Neukölln, and a published price sheet for small cafés.

Competitor: THE BARN

Pricing

- Core coffee "Atlas" (Guatemala): €13.90 for 250 g, €53.60 for 1 kg, €27.80 for 2 × 250 g [2][3].
- Core coffee "Genesis" (Ethiopia): €14.40 for 250 g, €55.60 for 1 kg [3].
- Seasonal single origins are typically €15.90–€19.50 per 250 g; rare lots run higher, e.g. a 100 g Gesha at €75.00 [3].
- Roasters Choice subscription (2 × 250 g every 4 weeks): €26.50/month with a 12-month commitment, €28.00 with 6 months, €30.00 month-to-month; shipping included in Germany [3][4].
- Office subscription: 3 kg every 4 weeks from €120.00 (12-month commitment) to €144.00 (monthly) [3].
- Wholesale pricing: not published (a wholesale page exists, no price list found) [17].

Positioning

- Premium, design-led specialty brand built around three "core coffees" (Atlas, Elemental, Genesis) plus rotating seasonal single origins [1].
- Very large café footprint: 10 cafés listed in Berlin plus Munich, London, Dubai, Palma, Seoul and Jeju [5].
- Claims "Roaster of the Year 2025 — by Crema Magazine" on its product pages [2].
- Promises orders ship within 1–2 business days from its Berlin roastery [2].

Strengths

- Strong brand reach and visibility from 10 Berlin cafés and international locations [5].
- Clear, easy-to-understand product ladder (core coffees → seasonal → rare lots) [1][3].
- Well-developed subscriptions for both homes and offices [3][4].

Weaknesses

- The best subscription price is locked behind a 12-month commitment, which can deter first-time buyers [3][4].
- Scale and international expansion make it feel less "neighbourhood" than a small local roaster (assessment).
- Range is very broad (coffee, equipment up to a €2,290 espresso machine, merchandise), which can make the shop harder to navigate [3].

Competitor: Bonanza Coffee Roasters

Pricing

- Bonanza Blend (Brazil & Peru): €14.90 for 250 g [8].
- Dark Roast: €13.90 for 250 g [11].
- Gogogu (Ethiopia), its bestseller: from €17.90 (250 g) up to €60.50 for the largest size [10].
- Other single origins: €17.90–€26.50 per 250 g [11].
- Bonanza Essentials Subscription (3 × 250 g per delivery): €47.50 [9].
- Wholesale pricing: not published [12].

Positioning

- Positions itself as a pioneer: "pioneers of European specialty coffee in Berlin since 2006" [7].
- Tagline "Unnecessarily Good Coffee"; emphasises precision and roasting "for clarity, sweetness, and expression" [7].
- Four Berlin locations listed on its homepage (Mitte, Kreuzberg, Prenzlauer Berg area) [7].
- Ships across Europe and offers wholesale "worldwide" [7].
- States roast date on bags shipped, e.g. "roast date within 13 days before shipping" for the Blend [8].

Strengths

- Strong heritage story (since 2006) that newer roasters cannot copy [7].
- Every coffee is sold ground for different brew methods (whole bean, filter, espresso, Moka pot) at the same price [11].
- Transparent sourcing details on product pages (farm, region, varietal, process) [8].

Weaknesses

- Single origins sit at the upper end of the Berlin range (€17.90–€26.50 per 250 g) [11].
- Only one consumer subscription format (3 × 250 g), so there is no small, cheaper subscription entry point [9][11].
- No public information about wholesale terms, so a small café has to enquire before learning anything (assessment).

Competitor: Five Elephant

Pricing

- House Filter and House Espresso: €12.50 for 250 g (the cheapest entry bag of the three) [14].
- Single origins: €15.50 to €31.00 per 250 g; a Colombian Geisha is

€28.00 for 200 g [14].
- Monthly Coffee Subscription (Germany): from €32.00 (2 × 250 g); minimum subscription duration two months [15].
- Free delivery threshold of €39, and free self pick-up at its Kreuzberg café [15].
- Wholesale pricing: not published; enquiries by email [16].

Positioning

- "Specialty coffee roastery & bakery" — known for coffee and cake together [13].
- Roasting in Berlin since 2010 [13].
- Five Berlin cafés listed (Kreuzberg, Neue Nationalgalerie, Mitte, Kollwitz, Schwedter) [13].
- Strong B2B pitch: wholesale "programs" with barista training, and a La Marzocco machine partner programme [16].
- Also sells home equipment, e.g. Sage Bambino at €248.46 [13].

Strengths

- Lowest entry price of the three (€12.50 house coffee) [14].
- Cake/bakery adds a second reason to visit and a distinct brand identity [13].
- Full-service wholesale offer (coffee, machines, training) for cafés and restaurants [16].

Weaknesses

- Subscription carries a two-month minimum and a fixed monthly billing and dispatch cycle (charged on the 20th, shipped in the last week) [15].
- Wide price spread up to €31.00 per 250 g may confuse casual buyers [14].
- Its wholesale programme targets serious hospitality accounts; very small cafés may feel it is not aimed at them (assessment).

Recommendations

- **Price a house coffee inside the €12.50–€14.90 band** for 250 g, where all three competitors place their entry bags [3][8][14]. Do not try to undercut €12.50; compete on freshness and service instead.
- **Launch a cancel-anytime subscription** with no minimum term and say so loudly; this directly contrasts with THE BARN's 12-month best price and Five Elephant's two-month minimum [4][15].
- **Offer free pickup in Neukölln** (and same-week local delivery by bike if feasible); Five Elephant already uses free pickup in Kreuzberg, which shows the idea works locally [15].
- **Publish a simple wholesale price sheet** for small cafés and offices

on the website. None of the three shows wholesale prices publicly [12] [16][17], so transparency is a real differentiator.
- **Print the roast date and promise a "roasted within X days" window**, matching Bonanza's practice [8], and keep the range small (3–5 coffees) so it is easier to choose than the larger competitors' shops (assessment).
- **Next step for a real client:** confirm the client's own costs per bag before fixing prices; this snapshot only covers competitors.

Method and limitations

- Research was done on 1 November 2026 using only the competitors' public websites (pages and public shop product data). No accounts were created, nothing was bought.
- Prices are consumer prices as listed online that day; in-café prices, discounts and shipping costs are not covered.
- "(assessment)" marks an analyst judgement rather than a sourced fact.
- Reviews, social media and foot-traffic data were not analysed in this sample.

Sources

[1] THE BARN homepage — https://thebarn.de/

[2] THE BARN — Atlas Coffee product page — https://thebarn.de/products/atlas-coffee

[3] THE BARN — public shop product data (prices per variant) — https://thebarn.de/products.json?limit=250

[4] THE BARN — Roasters Choice Subscription — https://thebarn.de/products/roaster-choice-subscription

[5] THE BARN — Cafés — https://thebarn.de/pages/cafes

[6] THE BARN — Office Coffee Subscription — https://thebarn.de/products/office-coffee-subscription

[7] Bonanza Coffee Roasters homepage — https://www.bonanzacoffee.de/

[8] Bonanza — Bonanza Blend product page — https://www.bonanzacoffee.de/products/bonanza-blend

[9] Bonanza — Essentials Subscription — https://www.bonanzacoffee.de/products/new-coffee-subscription-copy

[10] Bonanza — Shop page — https://www.bonanzacoffee.de/shop

[11] Bonanza — public shop product data (prices per variant) — https://www.bonanzacoffee.de/products.json?limit=250

[12] Bonanza — Wholesale page — https://www.bonanzacoffee.de/pages/wholesale

[13] Five Elephant homepage — https://fiveelephant.com/

[14] Five Elephant — Coffee collection — https://fiveelephant.com/collections/coffee

[15] Five Elephant — Monthly Coffee Subscription (Germany) — https://fiveelephant.com/products/monthly-coffee-subscription-germany

[16] Five Elephant — Wholesale — https://fiveelephant.com/pages/wholesale

[17] THE BARN — Wholesale page — https://thebarn.de/pages/wholesale