



CoffeeGo Self-service specialty coffee network · UAE

Investment summary · AED 5,000,000 · Roastery + flagship café · September 2026 · Confidential

In one paragraph

CoffeeGo already runs 117 self-service coffee machines across the UAE: 60 in corporate offices under signed monthly supply contracts, 52 in residential lobbies, business centres and public venues where we sell directly to consumers, and 5 in reserve. The network covers its own costs. We are raising AED 5M to add the missing piece — our own roastery in Dubai (opening October 2026) and a flagship café (2027) — turning a machine network into a vertically integrated coffee company with higher margin on every cup we already sell, plus capsule and subscription revenue on top. The network is run by Quantoo, our own AI platform: one field operator serves all 117 machines.



Office / public coffee point — a live CoffeeGo location



Micromarket — coffee + snacks, the next format for offices and residential lobbies

The business today — two channels, two economics

Channel	Machines	Revenue / month	Per machine	Annualised
Office — contracted B2B supply: 45 corporate clients, 55 contracts, contracted minimum AED 51,700/mo, billed at ~107% of minimum; +7 clients signed in July 2026	60	AED 65,000 (July–Aug 2026 level)	~AED 1,080	AED 780k
Public — own vending in lobbies, business centres, venues; card & app payments via one acquirer (independently verifiable)	52	AED 53,000 normalised (summer-2026 trough AED 32,600; Dec-2025 peak AED 1,202/machine)	~AED 1,020	AED 636k
Total network	117 (112 installed + 5 in reserve)	AED 118,000	—	AED 1.42M

- **Resilient core.** Through the Q2-2026 shock the office channel lost nothing per machine and grew to 60 machines; only public footfall dipped. Average ticket +12% (AED 8.49 → 9.52).
- **12-month outlook, Sep 2026 – Aug 2027, current fleet only.** Seasonally adjusted (summer trough over; Oct–Jan is high season): office ≈ AED 780k + public ≈ AED 557k ≈ AED 1.34M revenue, up to ≈ AED 1.42M at normalised run-rate; EBITDA ≈ AED 46k/month. Not included: 5 reserve machines, new clients, roastery margin. No bank debt, no leases, no shareholder loans.

Unit economics and operating leverage

Per machine, per month (fleet of 117): revenue AED 1,009 → variable cost of sales AED 342 (34%: ingredients, cups, location commissions) → variable opex AED 120 (route operators, transport, acquiring) → contribution AED 547 (54%). The fixed core — management, admin, accounting, licence, warehouse — is ≈ AED 18k/month and does not grow with the fleet. Break-even is ~33 machines; we run 117. An added machine costs AED 14,500 all-in (machine + location) and pays back in ~27 months on today's margins.

Fleet	Machines	Revenue / mo	Opex / mo	Opex % rev	EBITDA / mo	EBITDA margin	EBITDA / yr	Added capex
Today	117	118,000	32,000	27%	46,000	39%	0.55M	—
+50	167	168,500	38,000	23%	73,400	44%	0.88M	0.73M
+100	217	219,000	44,000	20%	100,700	46%	1.21M	1.45M

+150	267	269,400	50,000	19%	128,100	48%	1.54M	2.18M
+200	317	319,900	56,000	18%	155,400	49%	1.87M	2.90M
+250	367	370,300	62,000	17%	182,800	49%	2.19M	3.63M
+500	617	622,600	92,000	15%	319,500	51%	3.83M	7.25M

AED, today's normalised revenue per machine and cost structure (open-formula workbook provided). In-house roasting is not in these numbers — it lifts margin on every cup.

Quantoo — our own AI platform, the operating system of the business

Built in-house, running the network today. One system covers the whole loop: our own machine telemetry and device monitoring; our own payment layer at the machine and in the app (card, Apple Pay, deposit accounts; acquirer partnership); sales and cash collection; product catalogue, prices and promotions; assortment, stock and warehouse documents; service and quality; reports and the finance module; CRM and loyalty (prepaid deposits, bonuses, personal offers). An AI layer on top produces the daily, weekly and monthly numbers, flags silent machines, checks receivables per client, plans purchasing and refills, and scores each site's payback. Result: one route operator and one manager run all 117 machines; a tenfold network does not need a tenfold team. The same platform becomes the franchise hook (a franchisee's whole operation lives in it) and a SaaS line at AED 150 per site per month (8,100 sites by year 5). Full rollout of the AI modules (predictive demand, algorithmic routing, franchise console) is funded by this round.

What the AED 5M builds

Stage	Amount	What	When
1 — Roastery (Dubai)	AED 2,000,000	15 kg roaster (already purchased by founders), plant, capsule & drip lines; supplies the network from day one	Launch Oct 2026
2 — Flagship café	AED 3,000,000	~200 m ² high-footfall Dubai site, roaster behind glass; brand & roastery showcase. Breakeven month 4 at AED 360k/mo minimum revenue	Opening Oct 2027
Reserve	AED 561,000	Held openly inside the plan for fit-out overruns and the AI platform rollout	—

No further equity round is required; working capital from 2027 comes from a bank revolving facility (AED 1.75M limit applied for after the roastery is live).

Deal structure (reference terms — open to discussion)

- **Vehicle:** ADGM holding (English common law, ADGM Courts) owning 100% of the Network Company (CoffeeGo Company LLC), the Roasting Company, the IT Company and the Café Company.
- **Reference offer:** AED 5,000,000 for 44% of the Holding, fully diluted (founders 51%, option pool 5% borne by founders). Co-investors and smaller tickets can be discussed.
- **Capital released against milestones:** eight tranches, Aug 2026 – Sep 2027, each unlocked by a verifiable construction/launch event; shares issued as money arrives, investor rights in full from the first tranche.
- **Founders' contribution:** AED 1,795,812 of net assets already in the group (117 machines + roaster), no shares issued against it — the basis for the founders' 51%.
- **Governance:** consent rights on sale, liquidation, new shares outside permitted cases, out-of-budget or debt above AED 300k, change of business, auditor; full information rights; 4-year founder vesting, 1-year cliff.

Where this goes (60-month model v13, open formulas)

	Year 5 (2031)
Revenue / EBITDA / Net profit	AED 208.1M (~\$56.7M, +38% y/y) / AED 43.4M / AED 31.4M
Units under the brand	7,000 (6,000 franchised) · 8,100 on IT subscription · mix: roasting 49%, franchise 33%, own network 9%, IT 6%, café 2%
Valuation frame (6.5–10.5× EBITDA)	AED 300–430M — investor stake ×19 even at the bottom row already fixed in the Agreement

Next step: a 20-minute call, then the full data room (60-month model, unit economics, term sheet, SHA summary, machine-level revenue since Jan 2025). Happy to host you at a live location in Dubai. — coffee-go.ae/investing · +971 58 532 9288 · bugaevskii@coffee-go.com