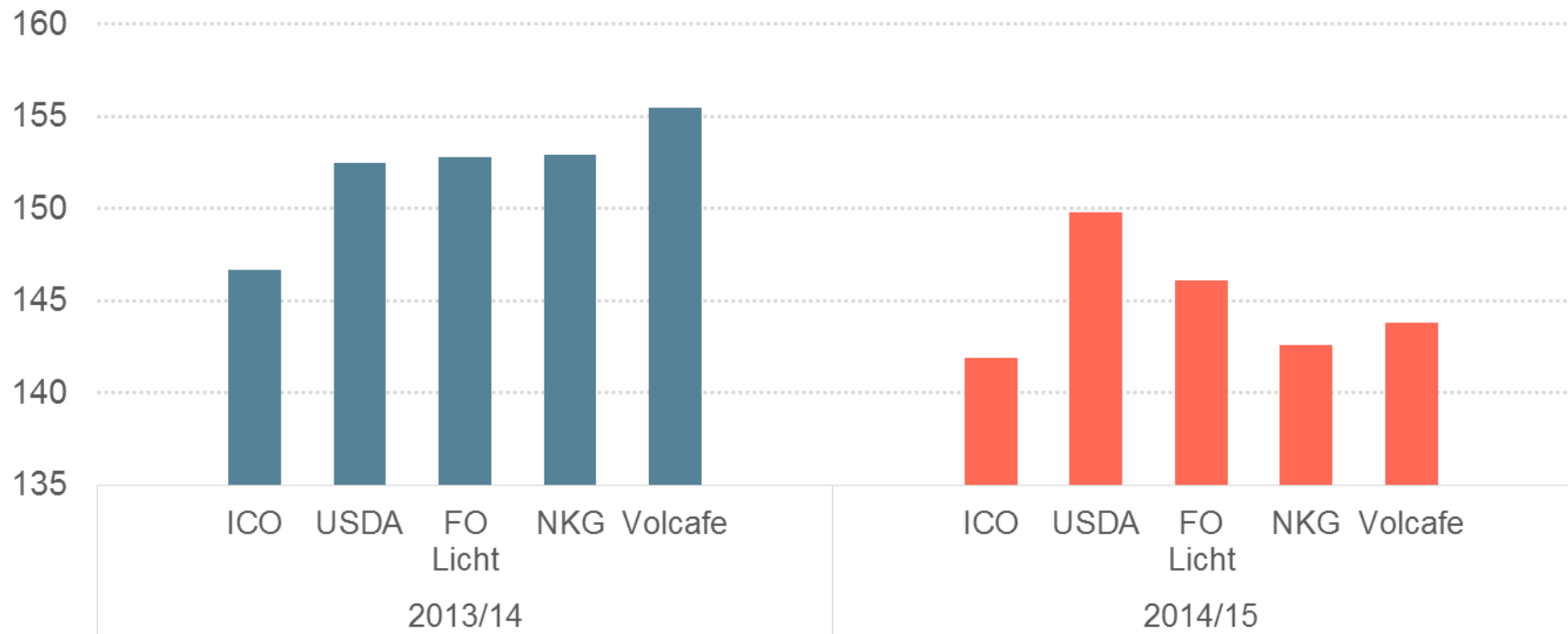


Where are we  
in the global  
supply chain?

# We don't know how much coffee is produced in the world every year

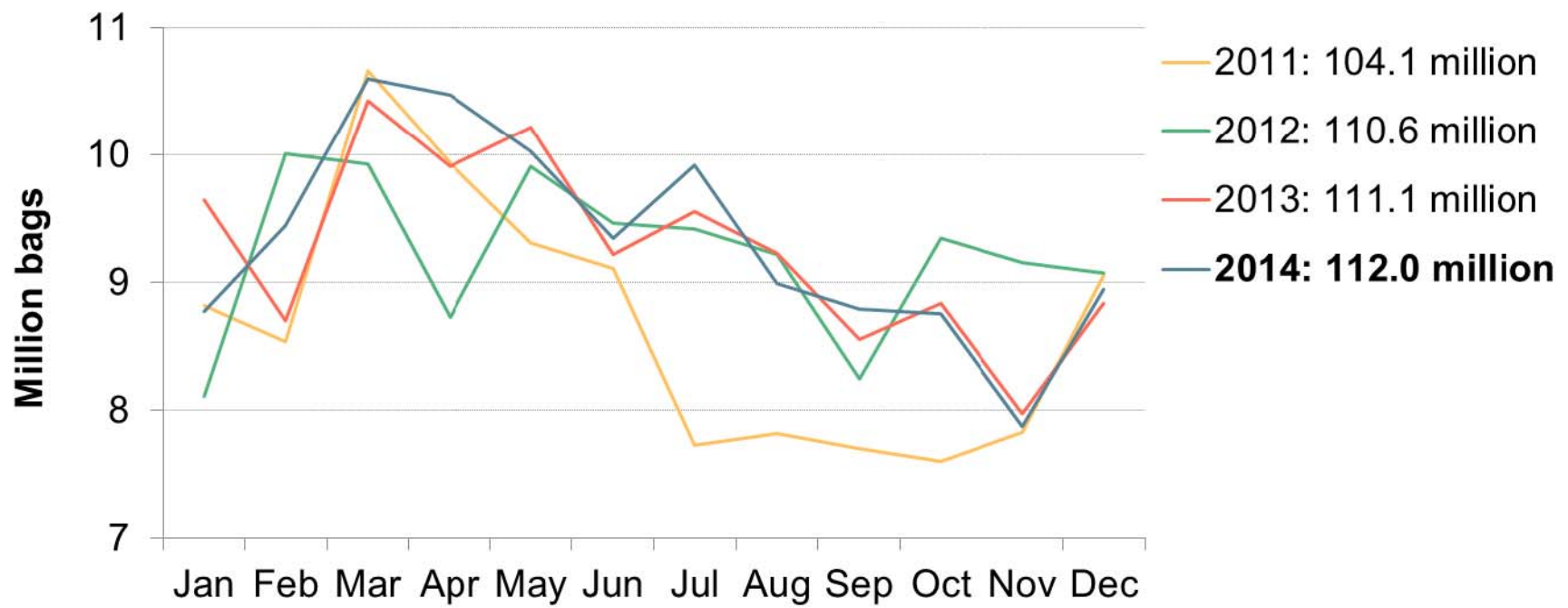




What do  
we know?

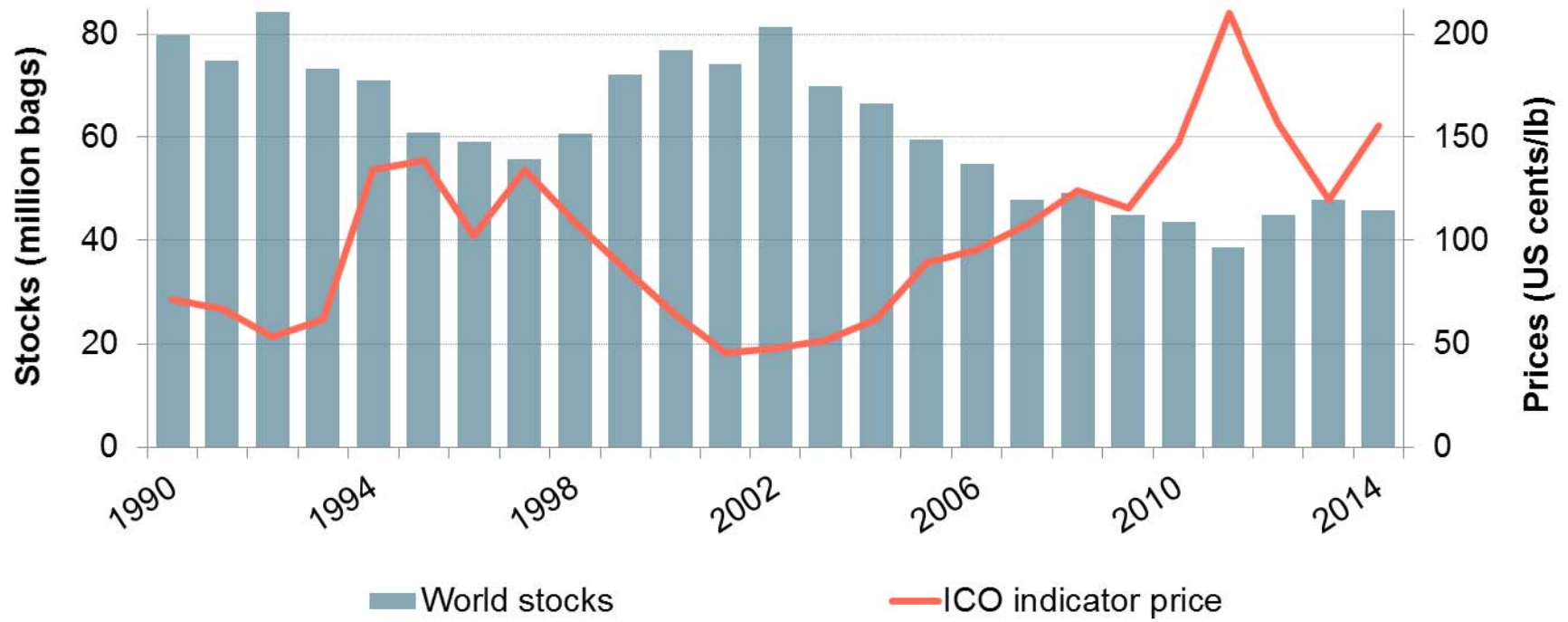
A photograph of a large, open sack filled with a variety of colorful apples, including red, yellow, and green ones. The sack is made of light brown burlap and is resting on a dark green wooden surface. A semi-transparent green circle is overlaid on the center of the sack, containing the text "Record exports" in white, sans-serif font.

Record  
exports



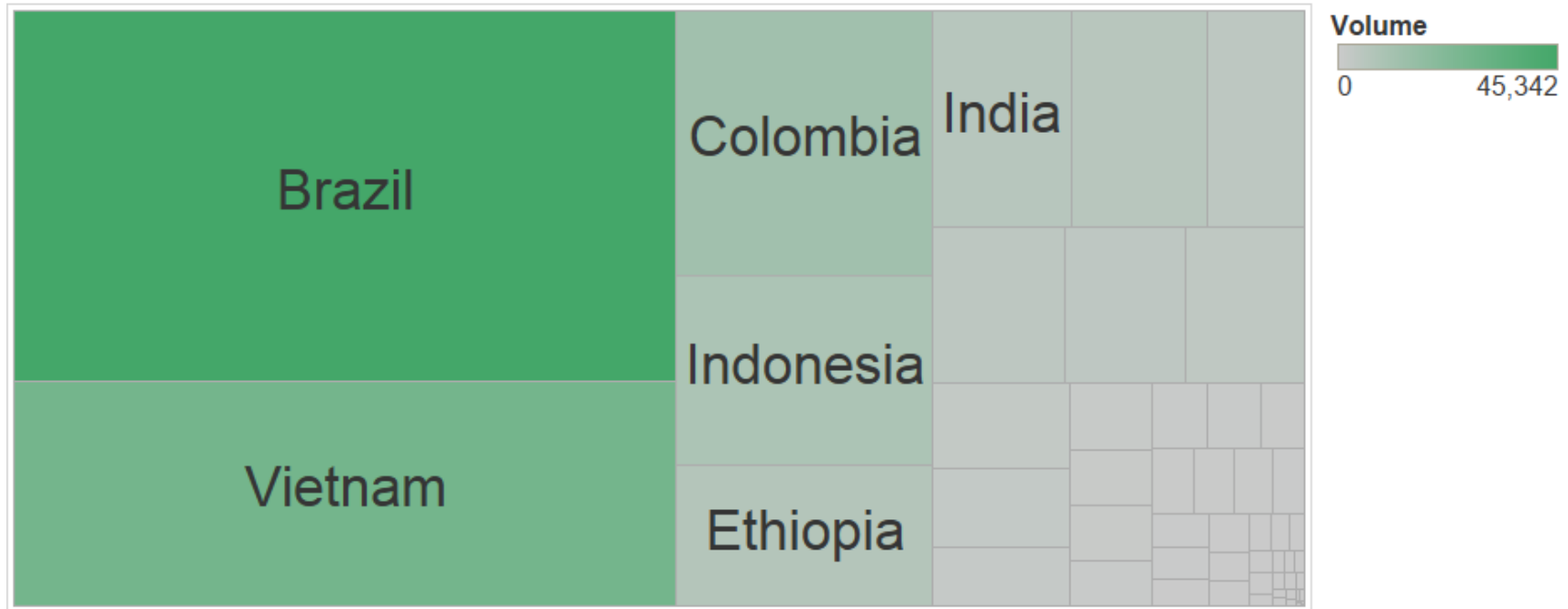


High price  
volatility



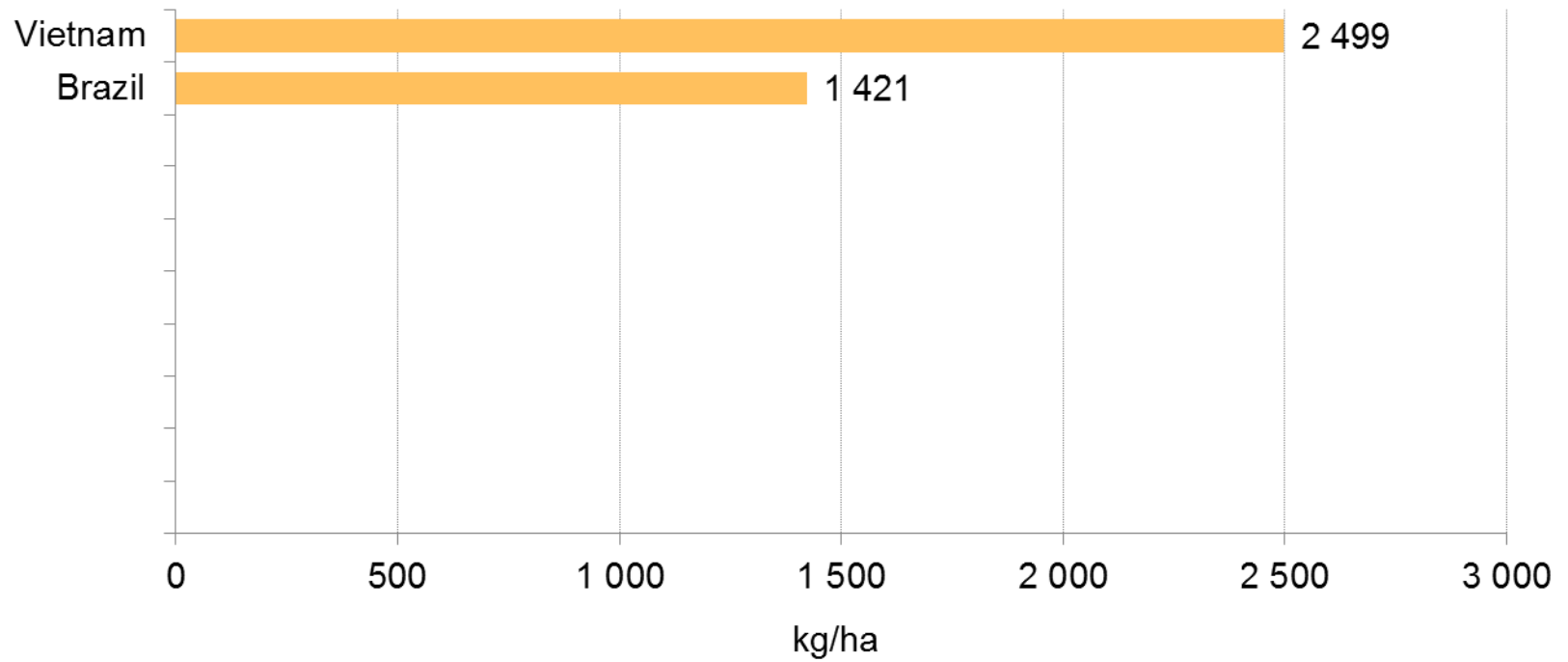
# Concentration in world production

World production

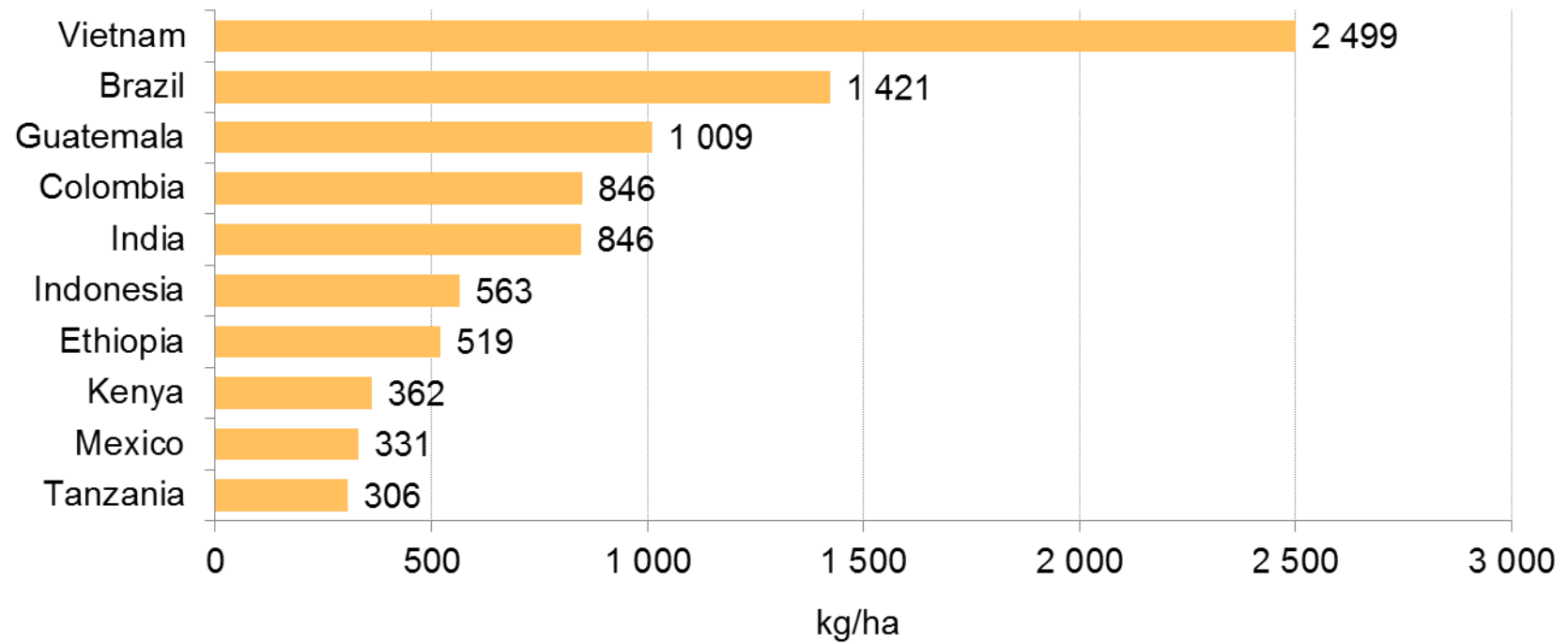




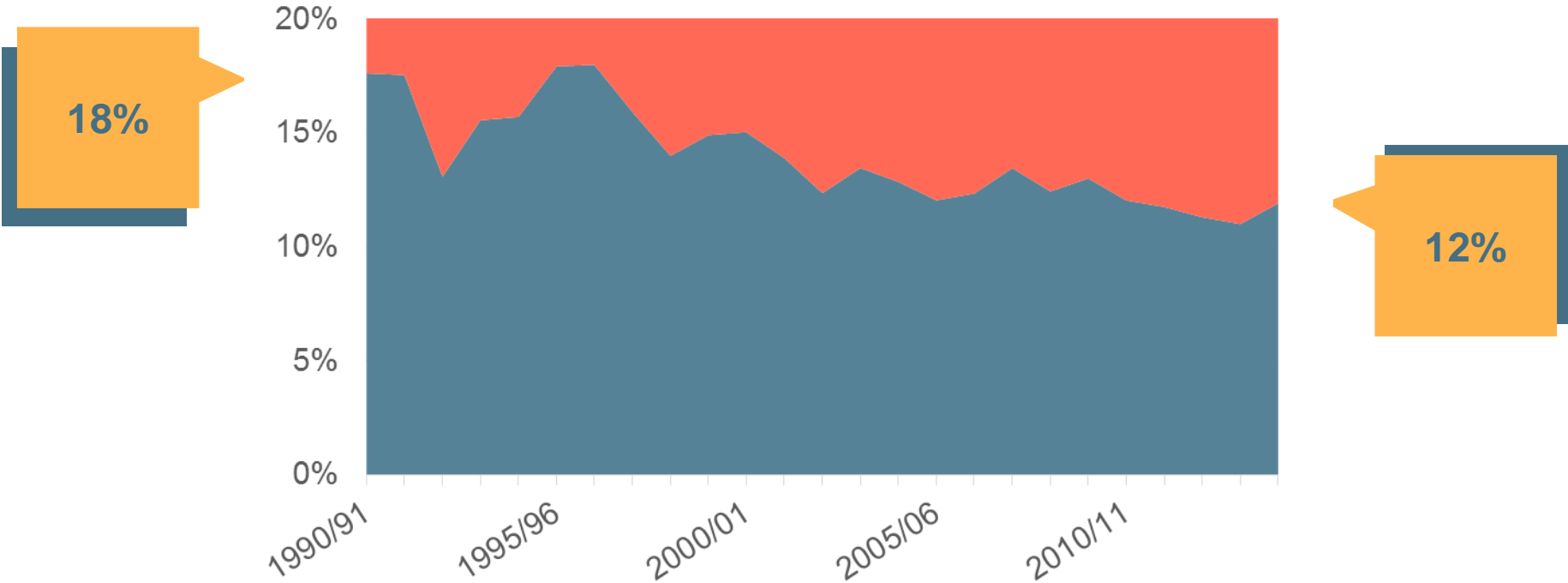
# Productivity



# Productivity



# But Africa is the worst affected

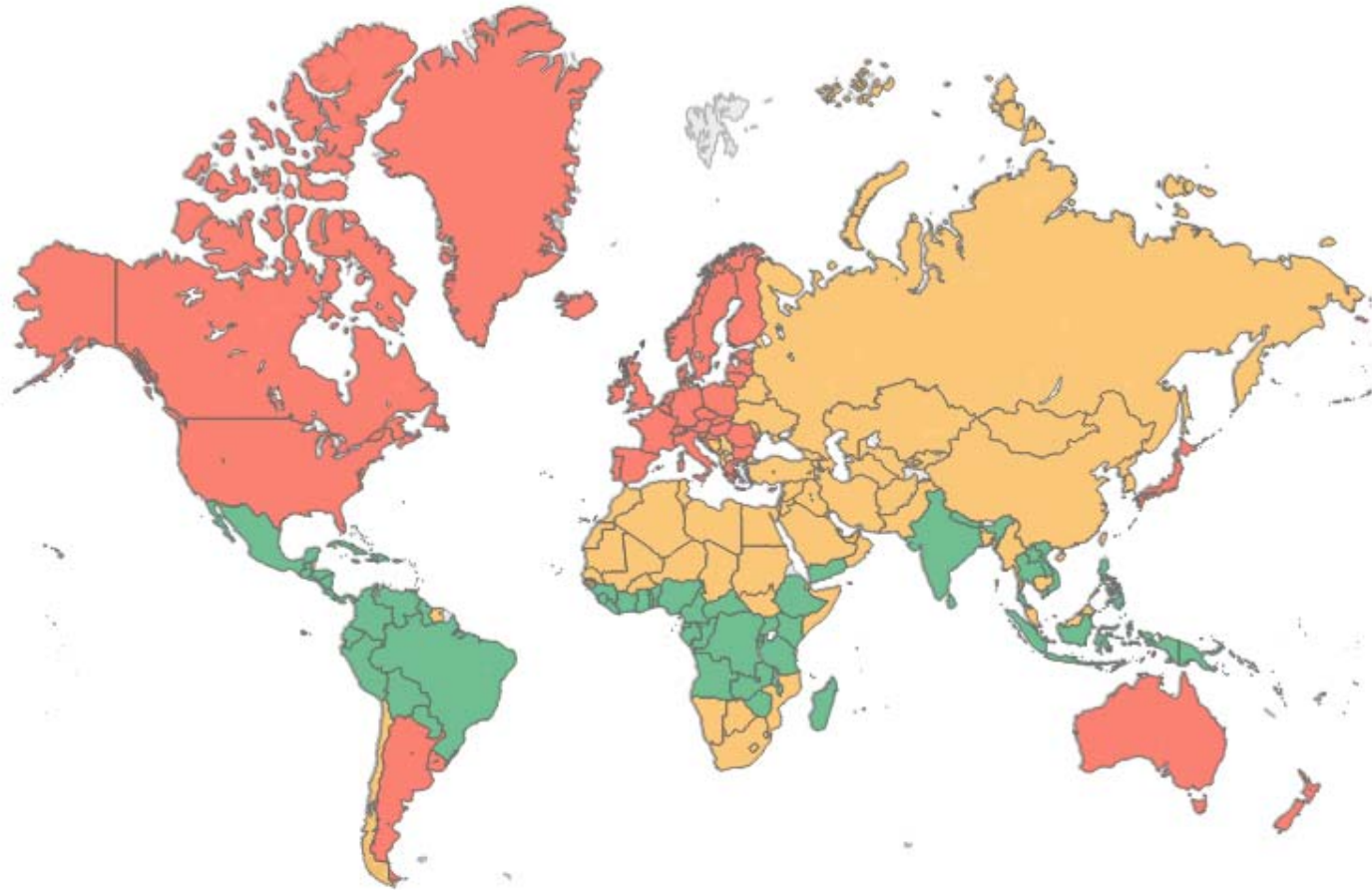




Small-scale  
farmers are  
going extinct



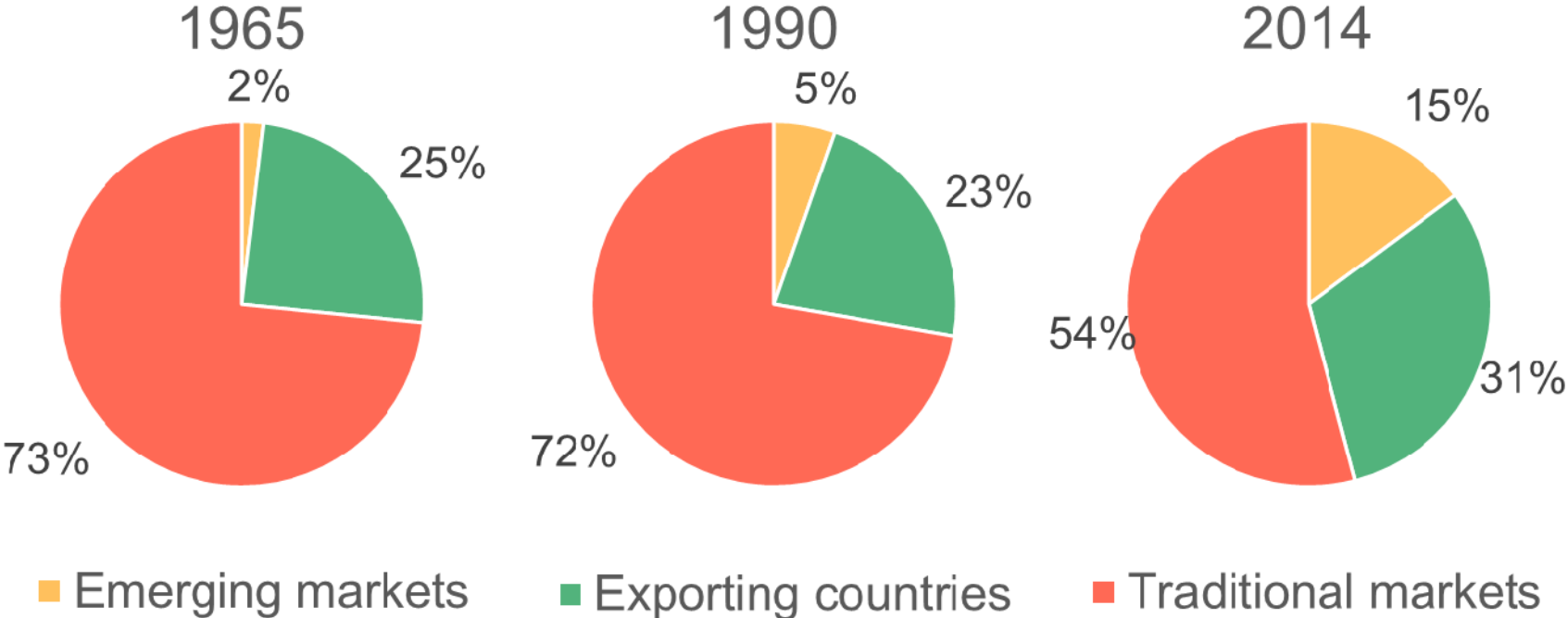
World  
consumption



 Traditional markets     Exporting countries     Emerging markets

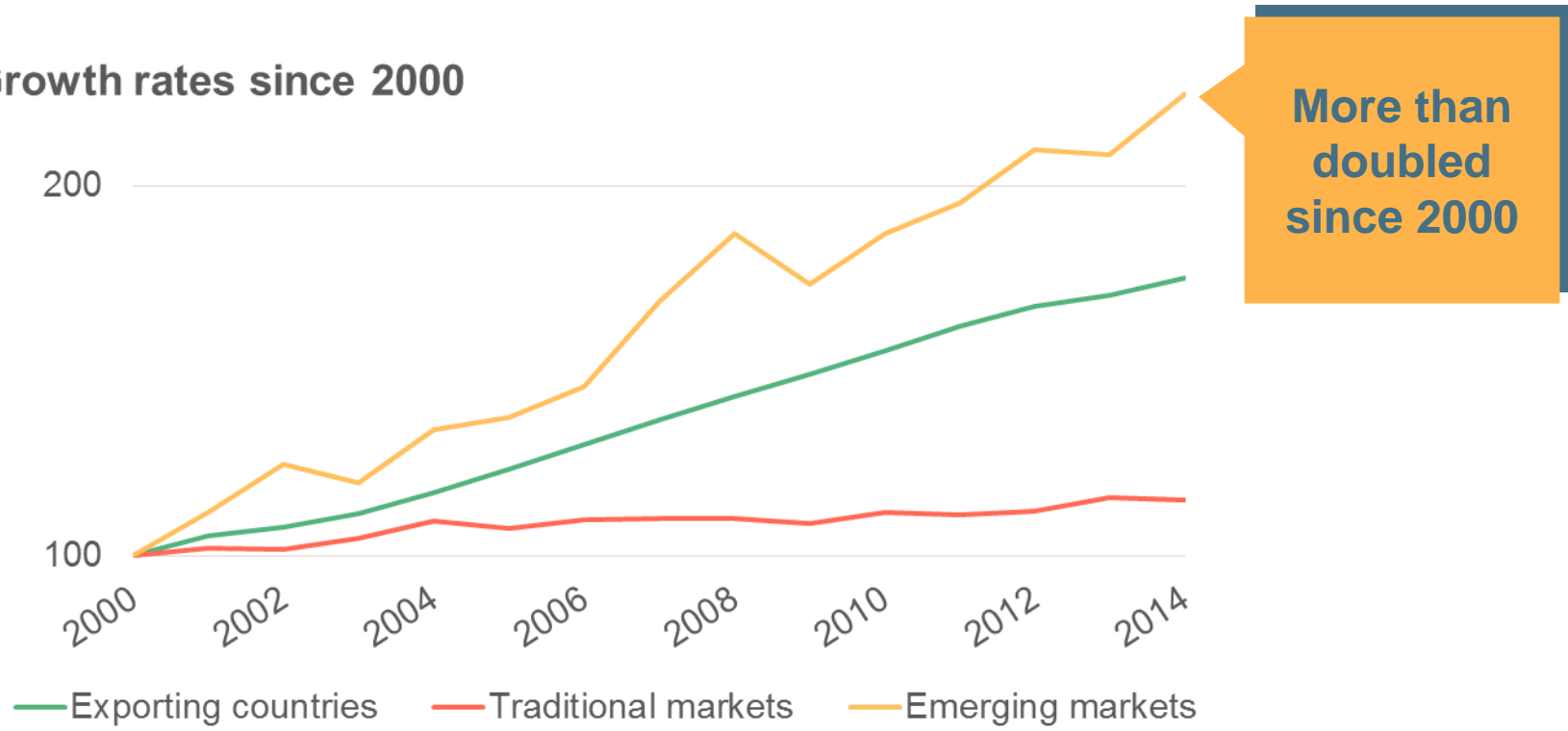


# Evolution of world consumption



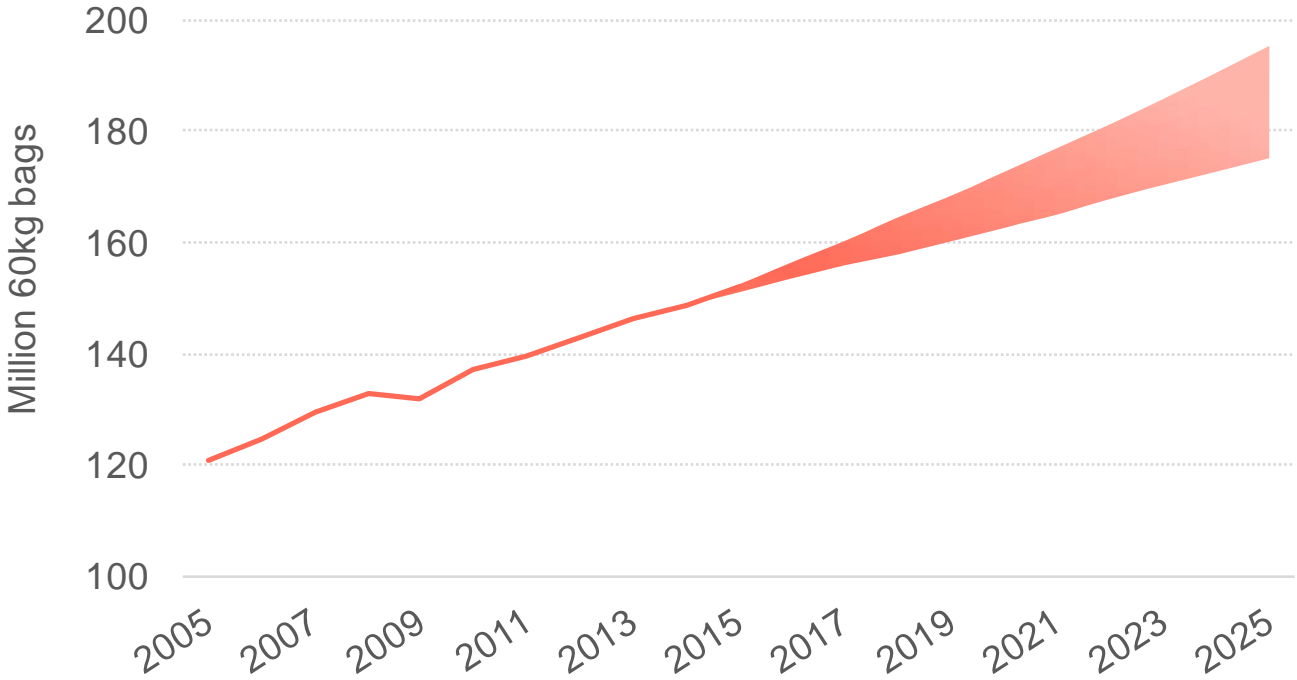
# Strongest growth is in emerging markets

Growth rates since 2000





# Prospects for future consumption



**175 – 195 million bags by 2025**

**Assuming between 1.5% – 2.5% growth rates**





# Conclusions