

As at 5 November 2009

**WORLD COFFEE CONFERENCE  
26 TO 28 FEBRUARY 2010, GUATEMALA CITY**

**COFFEE FOR THE FUTURE:  
TOWARDS A SUSTAINABLE COFFEE SECTOR**

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**FRIDAY, 26 FEBRUARY**

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**09:00 – 13:30**    **Registration**

**14:00 – 16:00**    **OPENING CEREMONY AND WELCOME SPEECHES:  
COFFEE, AGRICULTURE AND RURAL DEVELOPMENT**

**President of Guatemala, Chairman, World Coffee Conference**

**Presidents of ICO Member countries**

**Secretary-General of UNCTAD: Supachai Panitchpakdi**

**Managing Director, Common Fund for Commodities: H.E. Mr Ali Mchumo**

**Chairman of the Board, Guatemalan National Coffee Association: Ricardo Villanueva**

**Executive Director, International Coffee Organization: Néstor Osorio**

**16:00 – 17:00**    **KEYNOTE SPEECH**

**18:00**            **Reception hosted by President Álvaro Colom**

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**SATURDAY, 27 FEBRUARY**

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**SESSION 1**        **ECONOMIC SUSTAINABILITY: THE ECONOMICS OF PRODUCTION**

**09:00 – 11:20**    **World production: changes and trends**

**Moderator: Christian Rasch Topke, Chairman of the 2010 WCC Organizing Committee**

**African coffee in crisis – the way forward:  
Kwaku Owusu Baah, Director for Economic Studies, IACO**

The presentation will trace the history of the African coffee crisis – when and how it started, and include a trend analysis indicating the negative effects of the crisis on African coffee production and supply. It will analyse the socio-economic implications of the crisis on African coffee producing nations and their coffee farmers and provide policy options for consideration in efforts to revive the African coffee industry.

**Structural analysis of Brazilian coffee growing – crisis and achievements:  
Manoel Vicente Fernandes Bertone, National Secretary of Production and Agroenergy,  
Ministry of Agriculture, Livestock and Food Supply (MAPA), Brazil**

In terms of performance, Brazilian coffee growing has achieved excellent results, gaining an increasing share of the international market and with growth in domestic consumption exceeding that of world consumption. Despite this, Brazilian producers need better incomes and face significant financial difficulties. A structural analysis of Brazilian coffee growing and the international coffee economy indicates that appropriate public policies could provide higher net incomes for the sector and improved rural living conditions. Brazilian public policies could have an impact on the market and consequently on other producing countries.

**Outlook for Colombian coffee production:  
Luis Genaro Muñoz, General Manager, National Federation of Coffee Growers of  
Colombia**

This talk will focus on analysing the consequences of the coffee price crisis at the beginning of the century for coffee production in Colombia. It will also cover the strategies developed by the Federation, with the support of the Colombian Government, to ensure the competitiveness and innovation of Colombian coffee growing. These strategies are at the heart of an ambitious coffee tree renewal programme being carried out since 2006, which aims to bring Colombian coffee production to a level of 17 million bags in 2014. In addition, information will be provided on the tools designed to mitigate the impact that the increase in Colombian coffee supplies might have on the economic sustainability of producers. These tools focus on risk management associated with price volatility and exchange rates, promotion of domestic consumption, generational shift, income supplementation and coffee marketing.

**Central America:  
Max Quirin, Private Sector Representative to Guatemala's Monetary Board**

**Vietnam coffee sector – adjustment facing crisis:  
Dang Kim Son, Director-General of IPSARD, Ministry for Agriculture and Rural  
Development, Vietnam**

This paper will focus on changes in Vietnamese coffee supply since 2000-2004, the impact of the financial crisis on the livelihoods of Vietnamese coffee producers (income, investment, job creation, business), risk management issues (producers' reactions to market and policy risks etc.). Recommendations will include developing sustainable coffee development in Vietnam (adding value, coffee area), institutional changes and setting up and sustaining a coffee supply monitoring system in Vietnam.

**Panel discussion / questions**

**11:20 – 13:00      Production costs and constraints**

**Moderator: Rodolfo Trampe, Executive Coordinator, Asociación Mexicana de la Cadena Productiva del Café**

**The sustainability of harvesting strategies:  
Carlos Brando, P&A International Marketing, Brazil**

A person can only selectively pick a given weight of coffee per day. As a result the pickers' real salary, discounted for inflation, will remain basically the same indefinitely. But development raises the cost of living and aspirations all the time. The outcome is that coffee pickers will be progressively less able to pay for their basic needs, let alone satisfy their growing aspirations. Poverty will inevitably grow among coffee pickers at a time when so much is said and written about sustainability, including economic sustainability. Is there a way out? Fortunately yes, with technology and techniques already available. However their implementation is usually hindered if not fully prevented by tradition, misconceptions about quality losses, and a host of other arguments that do not resist a sound technical and economic analysis. The presentation will discuss concepts that challenge established paradigms in coffee harvesting and propose ways to increase the income of coffee pickers.

**East African specialty coffee: challenges and opportunities for East African farmers:  
David Browning, Director, TechnoServe**

This presentation will look at East African specialty coffee and the challenges and opportunities for smallholder farmers. The main points will be the opportunities for East Africa as an origin for the specialty coffee industry (and TechnoServe's recent experience with the Gates Foundation project working with 20,000 farmers). In addition, it will address the opportunities for farmers to improve their incomes (while ensuring a win/win scenario for the industry). Finally, it will highlight the challenges emerging from TechnoServe's work that the region must overcome in order to be a reliable supplier to the specialty industry.

**Panel discussion / questions**

**13:00 - 14:30      Lunch**

**SESSION 2            ECONOMIC SUSTAINABILITY: THE ECONOMICS OF DEMAND**

**14:30 – 16:45      World consumption: changes and trends**

**Moderator: (to be confirmed)**

**Driving sustainability for the mainstream coffee sector:  
Frank van Oers, CEO, International Beverage and Bakery Division, Sara Lee International**

Data shows most European consumers appreciate sustainable products but are reluctant to compromise on taste, quality or price. The CEO of Sara Lee's International Beverage business explains how the world's third largest coffee roaster meets the double challenge of satisfying its consumers while advancing sustainability. How to bring sustainable coffee to millions of consumers? Can the market afford to ignore consumer behaviour? How to

bring positive change to millions of coffee growers? How strong should the link be between sustainability and a direct price premium? The answer lies in the mainstream arena, where self-sustaining dynamics of supply and demand drive change rather than hinder it.

**Current state of coffee industry in Russia and CIS countries and how current economic situation, state of world green coffee market and modern world industry trends influence its future:**

**Alexander Malchik, Chairman of the Board, Organization of Russian Coffee Manufacturers**

This presentation will consider the last ten years of development of the coffee industry and coffee consumption in Russia and some CIS countries. It will also describe the changes in trends due to the current economic situation and show the potential for increase in the coffee market and what factors, both external (like the state of the world green coffee market) and internal (like the state of the local economy, state regulation etc.), could influence the rate of market growth in the near future.

**Recent coffee consumption trends, prospects and directions for the growth of coffee consumption in India:**

**V.G. Siddhartha, Chairman, Café Coffee Day**

**North America - to be confirmed**

**Development of the Japanese market and outlook for neighbouring country markets (Korea, Taiwan and China):**

**Keiji Ohta, Chairman, All Japan Coffee Association**

**Panel discussion / questions**

**16:45 – 18:15 Development of markets for differentiated coffee**

**Moderator: Mick Wheeler, Executive Director, Speciality Coffee Association of Europe (SCAE)**

**Developing sustainable specialty coffee markets 2010 and beyond: Ric Rhinehart, CEO, Specialty Coffee Association of America (SCAA), USA**

A brief look at how new economic forces have recast the key factors to developing sustainable markets for specialty coffees. This presentation will examine the impacts of a variety of factors, including recent world economic conditions, changing consumption patterns, land use pressures and changing social conditions. The presenter will explore forecasts for growth in traditional consumer markets as well as emerging markets and balance these against rising costs for producers and increasing pressure from commercial markets.

**Differentiation: The markets for quality, certified, and origin-identified coffees: Daniele Giovannucci, Co-Founder, The Committee on Sustainability Assessment (COSA)**

Even in recession, the explosion of demand for certain 'newer' coffees continues at a pace that dwarfs the growth of the more conventional coffees in the major traditional markets. As both consumers and supply chains quickly become more sophisticated, new opportunities are opening up in areas that were merely micro-niches just a few years ago. A

look at new data offers some rather surprising views. What happens as market titans such as WalMart, Kraft, and McDonalds move strongly into specialty and into sustainability? What is the status of certified and origin-identified coffees? What are the new trends for Organic, Rainforest Alliance, Fair Trade, Utz, 4C, and Starbucks?

**Speaker (to be confirmed)**

**Panel discussion / questions**

**19:00**      **50<sup>th</sup> Anniversary of Anacafé – Gala party**

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**SUNDAY, 28 FEBRUARY**

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**09:00 – 09:45**      **Outlook for supply and demand**

**Moderator (to be confirmed)**

**Rob Simmons, Head of Coffee and Cocoa, LMC International Ltd.**

**Is there still room for growth in coffee consumption?**

**Judith Ganes-Chase, Founder and President, J. Ganes Consulting LLC**

Coffee consumption grew in popularity worldwide over the past decade, but can this trend be sustained? New cafés are springing up on street corners around the world and it seems that demand should continue to percolate for years to come. However, coffee has to compete head on with a proliferation of new and hip beverages that are capturing the imagination of manufacturers and marketers and the dollars of young consumers. This could pose a threat to coffee as a beverage category if new product innovation fails to keep pace with the ever changing marketplace. This presentation will focus on the latest trends and how coffee could stay fresh in the minds of consumers.

**SESSION 3**      **ENVIRONMENTAL SUSTAINABILITY**

**09:45 – 11:30**      **Environmental sustainability**

**Moderator: David Brooks, Director for Natural Resources Policy and Environmental Reviews, Office of the US Trade Representative**

**Climate change and coffee production: vulnerability and possible adaptation:  
Eduardo Assad, EMBRAPA**

The cultivation of Arabica coffee requires average annual temperatures of 18°C to 23°C. Robusta coffee is less sensitive to climate changes and adapts well to much higher temperatures, with annual averages of 22°C to 26°C. However the coffee plant in general is far less tolerant of the cold. Temperatures of -3.5°C cause damage to leaf tissue and trunks and can be lethal. On the other hand, Arabica production is adversely affected when average annual temperatures are above 23°C. Intense heat during the flowering phase aborts the buds and the plant fails to bear fruits. This presentation will show the impact of climate change using IPCC predictions on coffee production in Brazil and other parts of the world.

**Peak Coffee? Future-proofing the coffee supply in a changing world:  
Peter Baker, Project Development Coordinator, CABI Bioscience**

Concepts of sustainable production have been embraced by the coffee industry in recent years but despite this, the industry faces a number of threats, including climate change, population pressure and spread of pests and diseases. All of these are likely to impact on the coffee business with increasing weight and frequency in the coming years. The lecture will examine some of these challenges as well as the responses that are required if the supply of coffee is to continue to grow in a crowded world. This will include the need for greater attention to strategic planning and long term investment in coffee research, technology and knowledge transmission than has hitherto been deemed necessary.

**Fernando Gast, Executive Director, Cenicafé, Colombia**

This presentation will focus on pointing out that Colombian coffee growing regions show wide diversity in soil use, cultivation systems and types of coffee farming. This creates environmental heterogeneity, offering habitats that are highly favourable to biodiversity with regard to other types of productive landscapes. Coffee areas can, therefore, make a considerable contribution to mitigating the effects of climate change, since forests in coffee areas can be maintained and extended through market mechanisms associated with deforestation prevention and green certification like the carbon neutral coffee certificate, which create a link with consumers prepared to pay more for biodiversity-friendly coffee and coffee growers who promote environmental sustainability on their farms and in their regions. Although water is the most renewable natural resource and there are abundant water reserves in Colombia's coffee areas, the region is not free from the risks of the growing world shortage of this element. This is why it is so important to establish the size of the water footprint in coffee areas and to seek conservation tools that complement one another and can be adapted both to the needs of the forest populations and to those of the human beings living in the area.

**Biodiversity:**

**Taye Kufa, Coffee Agronomist/Ecophysiologicalist, Jimma Agricultural Research Centre, Ethiopia**

**Panel discussion / questions**

**SESSION 4 SOCIAL SUSTAINABILITY**

**11:30 – 13:00 Women and coffee**

**Moderator: H.E. Mme Josefa Sacko, Secretary-General, IACO**

**Launtia Taylor, President, International Women's Coffee Alliance (IWCA)**

**Ana Laura Quirós Montoya, President of the Asociación de Mujeres Organizadas de Biolley (Organized Women's Association of Biolley) (ASOMOBI), Costa Rica**

**Sunalini Menon, Founder, Coffeelab Private Ltd., India**

**Panel discussion / questions**

**13:00 – 14:30 Lunch**

**14:30 - 16:15 The Millennium Development Goals and support for producers**

**Moderator: Saint-Cyr Djikalou, Permanent Representative of Côte d'Ivoire to International Commodity Bodies in London**

**Lluis Riera Figueras, Director, Directorate General for Development and Relations with African, Caribbean and Pacific (ACP) Group of States, European Commission**

**Government support programmes and subsidies for the coffee sector in India:  
G.V. Krishna Rau, Chairman, Coffee Board of India**

Government support to the coffee sector in India covers a large spectrum of activities such as research, strong extension support, training and capacity building and subsidy support for replantation, infrastructure for quality upgrading like drying yards, on-farm processing facilities, water augmentation, subsidy towards premium for weather-based insurance. The Government also extends subsidies for setting-up coffee processing units such as roasting and grinding units. Government support to coffee growers includes not only coffee but associated crops like pepper and cardamom to improve the sustainability of coffee farms with diversification at the farm level.

**Youth, social sustainability and coffee in African coffee producing countries:  
Ishak Kasule Lukenge, Managing Director, KDS Coffee Ltd., Uganda**

The presentation will start with a definition of youth in the African context and then will proceed to give the current social challenges affecting youth in African coffee producing countries. The presentation will then discuss current gaps in youth social sustainability in African coffee producing countries, present the status of youth and coffee in African coffee producing countries and make recommendations.

**Janet Ballantyne, Acting Assistant Administrator for Latin America and the Caribbean, U.S. Agency for International Development**

**Panel discussion / questions**

**16:30 – 17:30 Closing ceremony and conclusions of the Conference**

**President of Guatemala (Chairman of the World Coffee Conference)  
Néstor Osorio, Executive Director of the ICO**