Business Solutions to the Coffee Crisis

TECHNOSERVE
Business Solutions to Rural Poverty

December 4, 2003

EXECUTIVE SUMMARY

Producers of coffee and their employees continue to endure a profound economic and humanitarian crisis. For many of the world's 25 million producers, coffee prices remain lower than the cost of production for the third straight season.

The coffee industry has experienced crises in the past. This crisis, however, is unique. There has been a systemic shift in the cost structure of the coffee industry as a result of innovation in Brazil and the growth of Vietnam as low-cost producer. While prices may recover in the short term, long-term prices are likely to remain in a range that will leave many producers unprofitable. Many workers on medium and large-sized farms will be particularly vulnerable in this altered competitive landscape.

While there is no single answer to this crisis, TechnoServe believes that given limited resources there are three market solutions which offer the highest potential for sustainable impact:

- Increase coffee consumption in producing countries and emerging market countries
- Support specialty coffee producers in their efforts to secure market premiums
- Promote diversification into other products and industries for regions with a high concentration of marginal coffee producers that do not have the potential to differentiate via specialty markets.

Diversification initiatives may have the greatest need for targeted support. Increasing consumption is being discussed among industry players. Specialty coffee initiatives have gained support from various NGOs and governmental funding agencies. Diversification initiatives, however, are less apparent despite the fact that this solution could be of great assistance for large numbers of in-crisis producers and workers.

INTRODUCTION

- TechnoServe asked McKinsey & Company to assess the origins of the coffee crisis, likely developments and potential solutions

- TechnoServe assembled an Advisory Council of experts from across the coffee industry to provide direction and input to this initiative

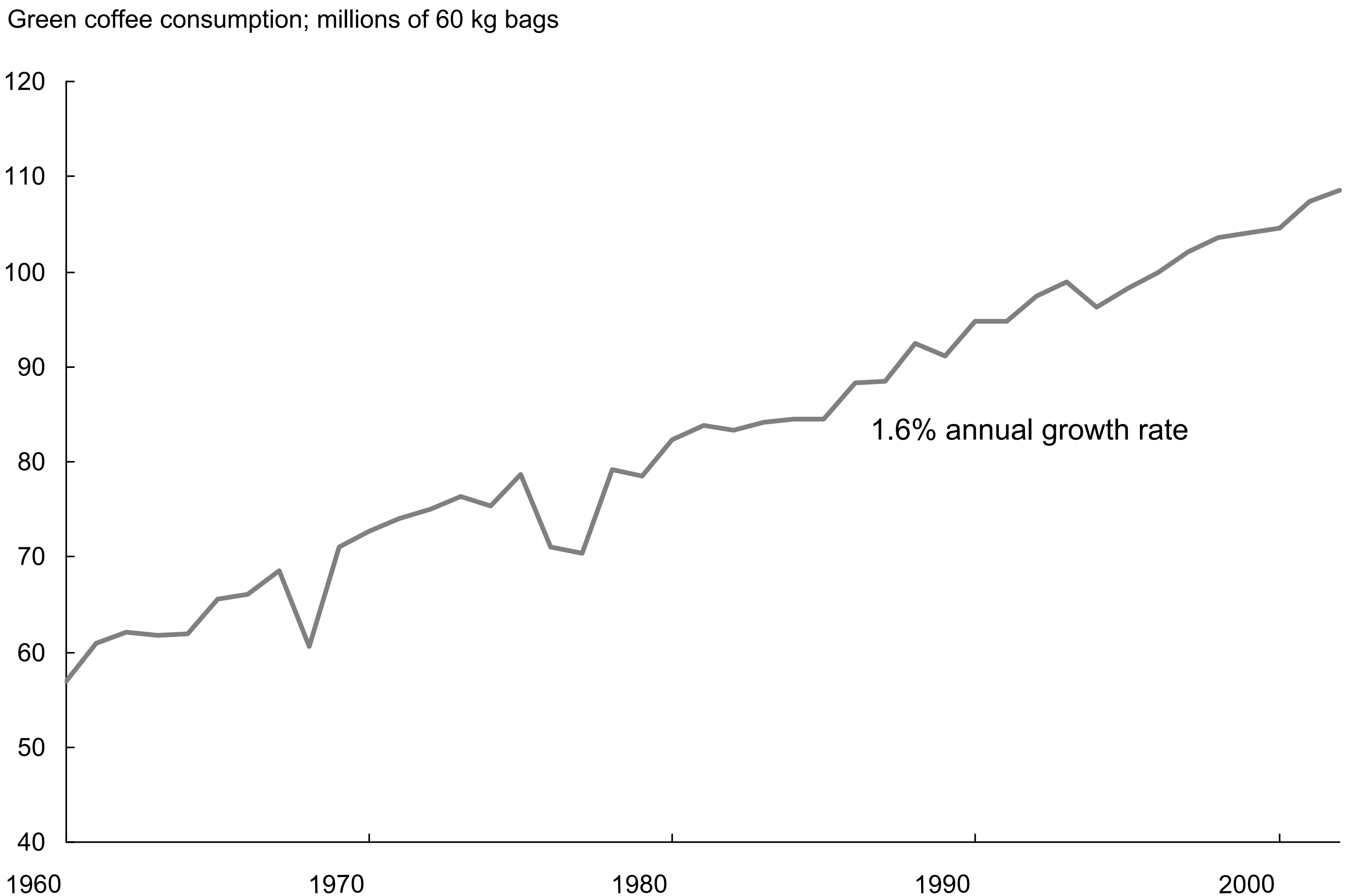
- McKinsey conducted nearly 200 interviews of global coffee experts and producers

- McKinsey conducted in-depth, on-site analyses of the coffee industries in Brazil, Guatemala, Tanzania and Vietnam to develop a detailed understanding of the current situation in each country

- TechnoServe used the findings of the McKinsey study and the organization’s decades of field experience in assisting coffee producers as the basis for this report and its recommendations.

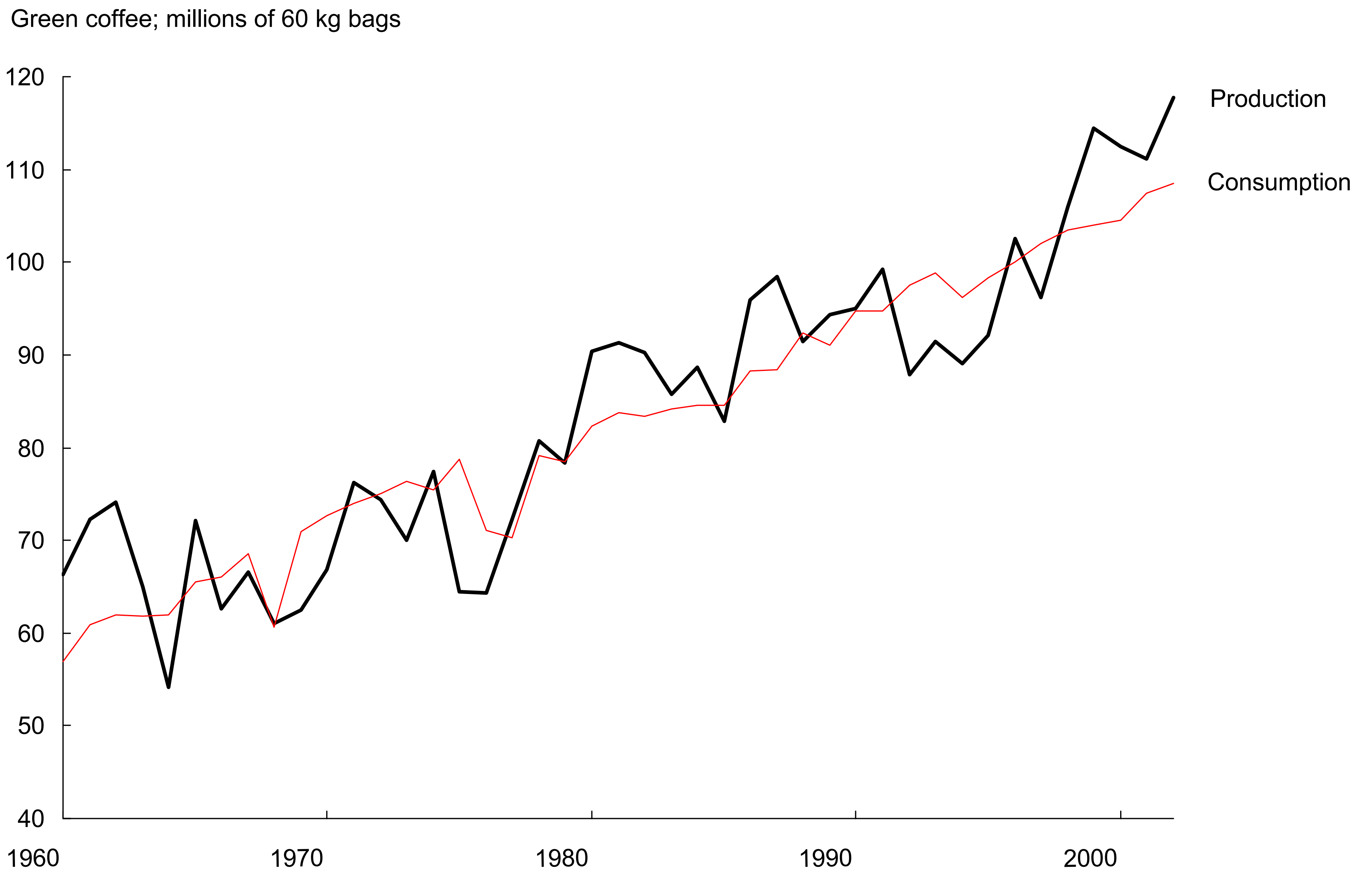
CONTENTS

COFFEE CONSUMPTION HAS GROWN STEADILY OVER THE PAST 40 YEARS



Source: ICO; World Bank; *150 Years of Coffee*, Marcellino Martins and E. Johnston

COFFEE PRODUCTION HAS BEEN SUBJECT TO MORE VOLATILITY THAN CONSUMPTION



Source: ICO; World Bank; *150 Years of Coffee*, Marcellino Martins and E. Johnston

THIS PRODUCTION VOLATILITY HAS BEEN DRIVEN BY TWO FACTORS

Weather

- Brazil's dominant position in world coffee production makes global supply highly susceptible to frosts and drought in Brazil's coffee regions

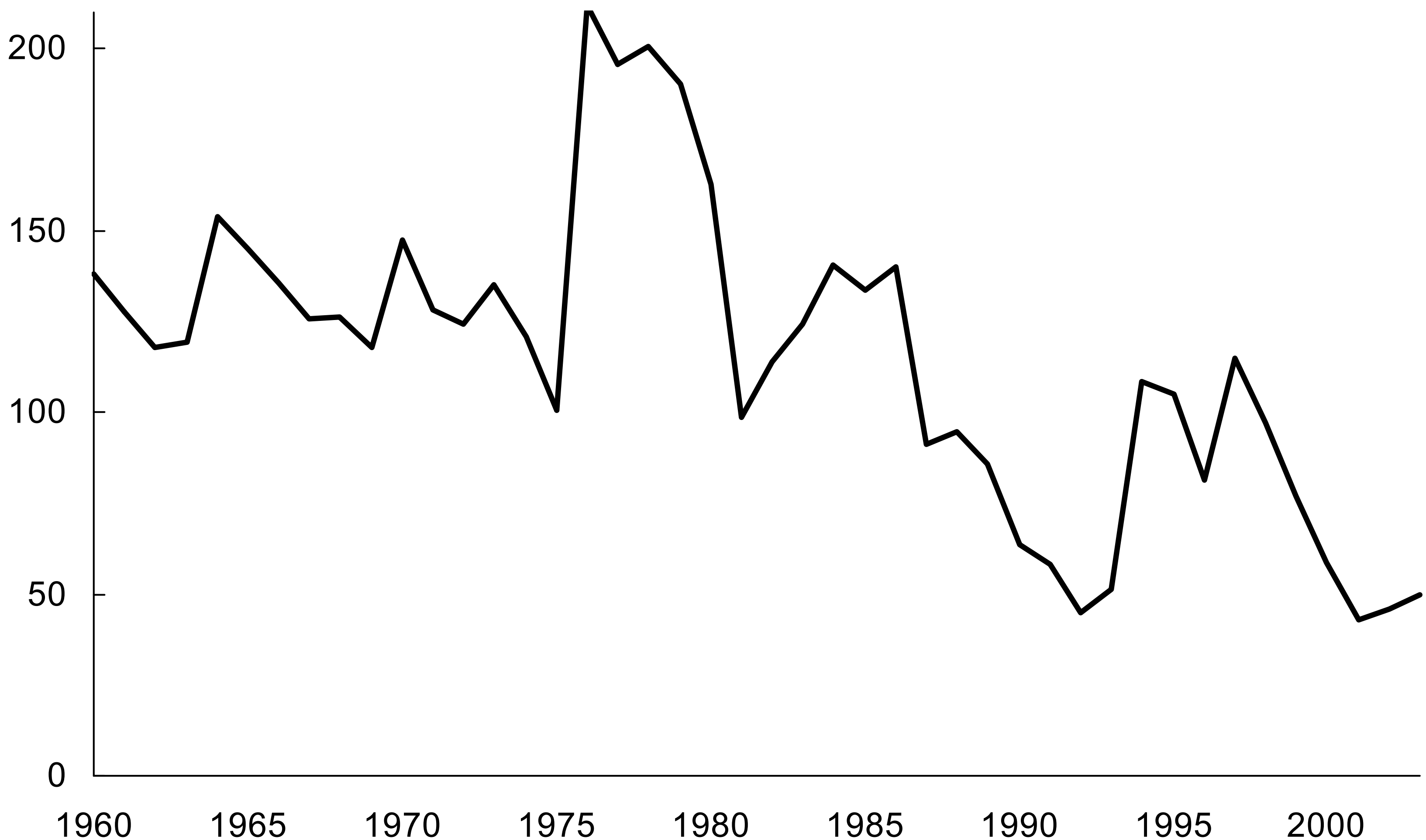
Supply Adjustment Lags

- Supply does not immediately decline when prices drop because coffee must still be picked in order to maintain healthy trees regardless of the market price
- New trees do not start producing fruit for 3 years, which causes a significant lag in production increases related to market events

Source: Interviews; World Bank; team analysis

RECENT PRODUCTION SURPLUSES HAVE CAUSED PRICES TO DROP TO RECORD LOWS

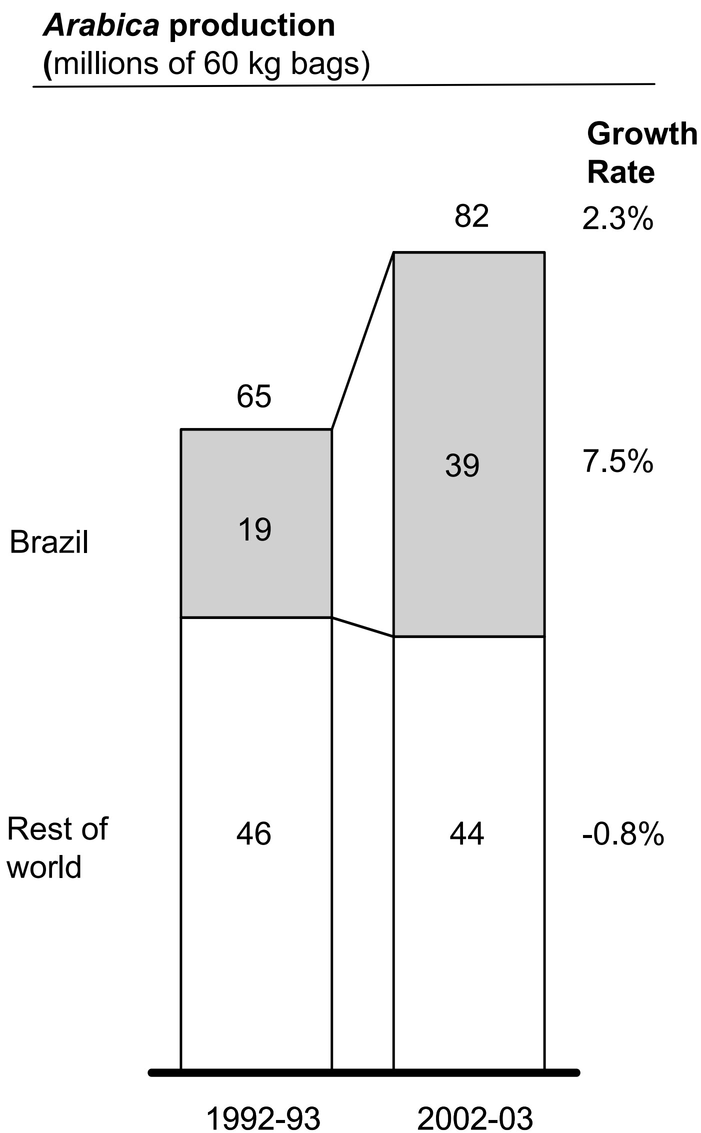
Real price of green coffee
ICO indicator price, U.S. ¢ per lb., constant 2002 dollars*

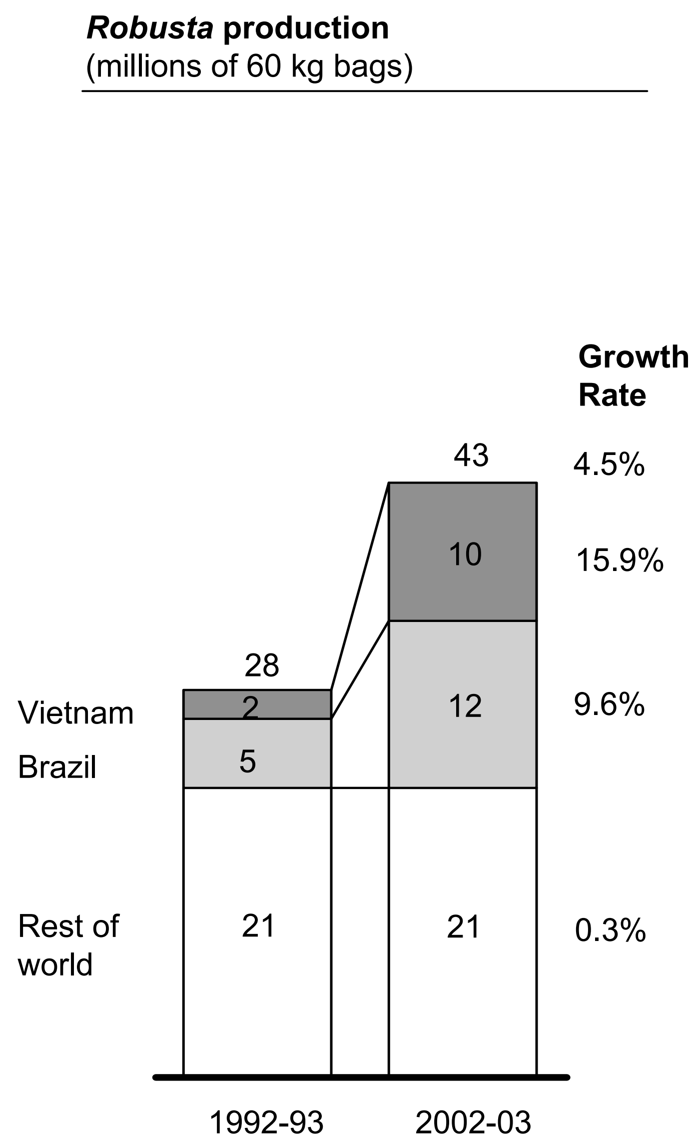


* Real price index created by combining 1900-91 average U.S. import prices from *150 Years of Coffee* and 1992-2002 ICO indicator prices; all prices in 2002 dollars adjusted using World Bank Global Manufactured Unit Value index

Source: ICO; World Bank; *150 Years of Coffee*, Marcellino Martins and E. Johnston

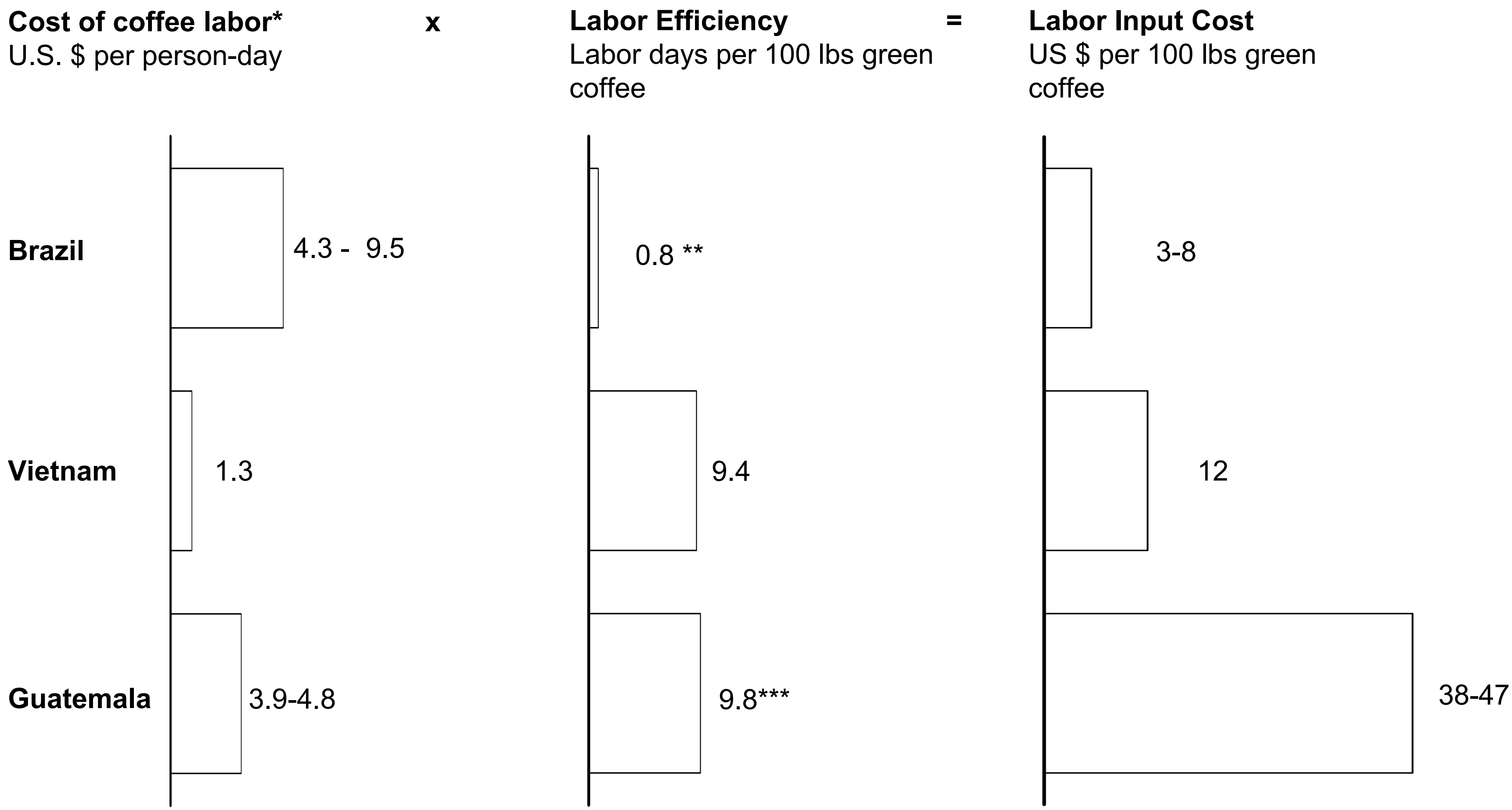
THE RECENT INCREASE IN PRODUCTION HAS BEEN DRIVEN LARGELY BY BRAZIL AND VIETNAM





Source: USDA; interviews

BRAZIL AND VIETNAM HAVE A COST ADVANTAGE DUE TO HIGH EFFICIENCY AND LOW LABOR COSTS



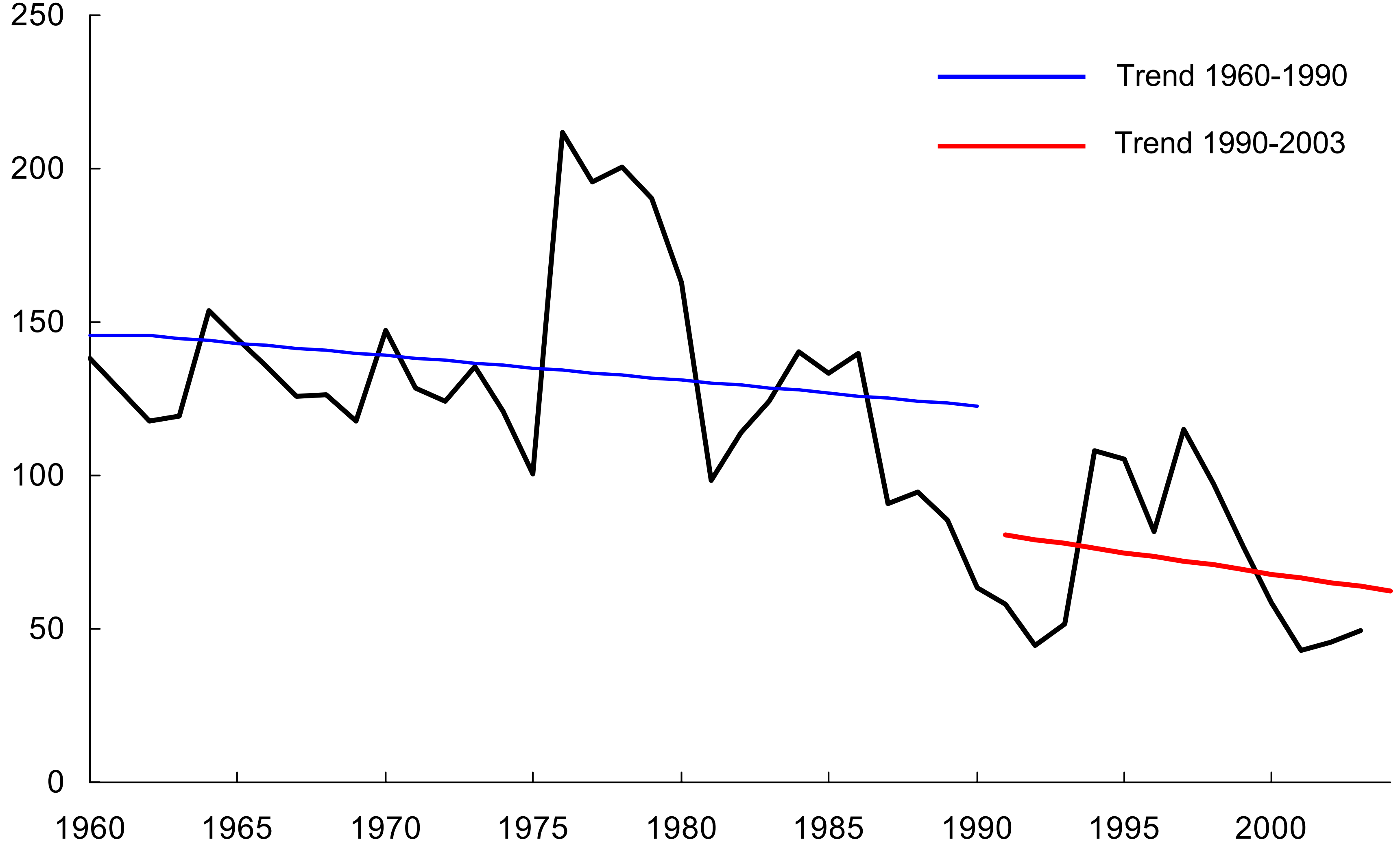
* Range based on direct wages (low-end) and fully loaded cost (high-end)
** Assuming mechanical harvesting
*** Uses Guatemala wage of $4.75 per day and includes wet-milling in labor costs

Source: Interviews, cost models, team analysis

THE PRICE DROP REFLECTS A SYSTEMIC CHANGE IN THE COFFEE INDUSTRY

Price trend green coffee 1960-90 and 1990-2003

ICO indicator price, U.S. ¢ per lb., constant 2002 dollars*



Source: ICO; World Bank; Team Analysis

THREE FACTORS HAVE DRIVEN THIS SYSTEMIC CHANGE SINCE THE END OF THE INTERNATIONAL COFFEE AGREEMENT

Innovation in Brazil

- Migration of production to less frost-prone areas and increased irrigation
- Improved mechanical harvesting
- Government programs providing price forecasting and risk management
- Industry organization across the value chain to increase productivity, coordination and market responsiveness

Entry of Vietnam

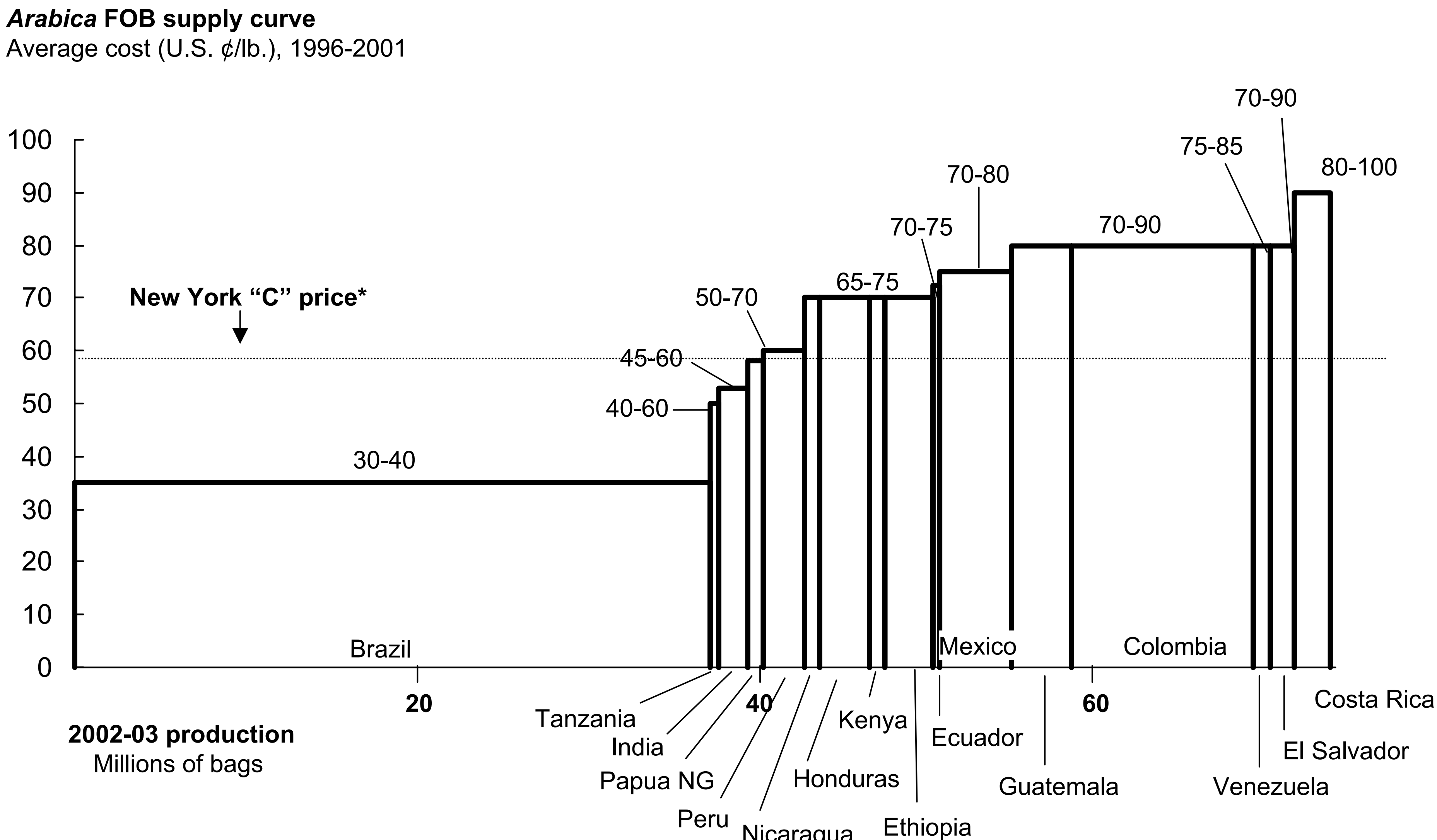
- Production has increased from 2 million to 10 million bags in 10 years
- Low labor costs
- Proactive government policies providing yield improvement and market information
- Excess production capacity equivalent to 8% of 2002 global *Robusta* demand

Increasing share of *Robusta*

- New ways to reduce the acidity of *Robusta* and increase its use in blends
- Use of *Robusta* in popular flavored coffees which mask the harsh taste
- Growth of coffee consumption in more price-sensitive countries

Source: Interviews; World Bank; team analysis

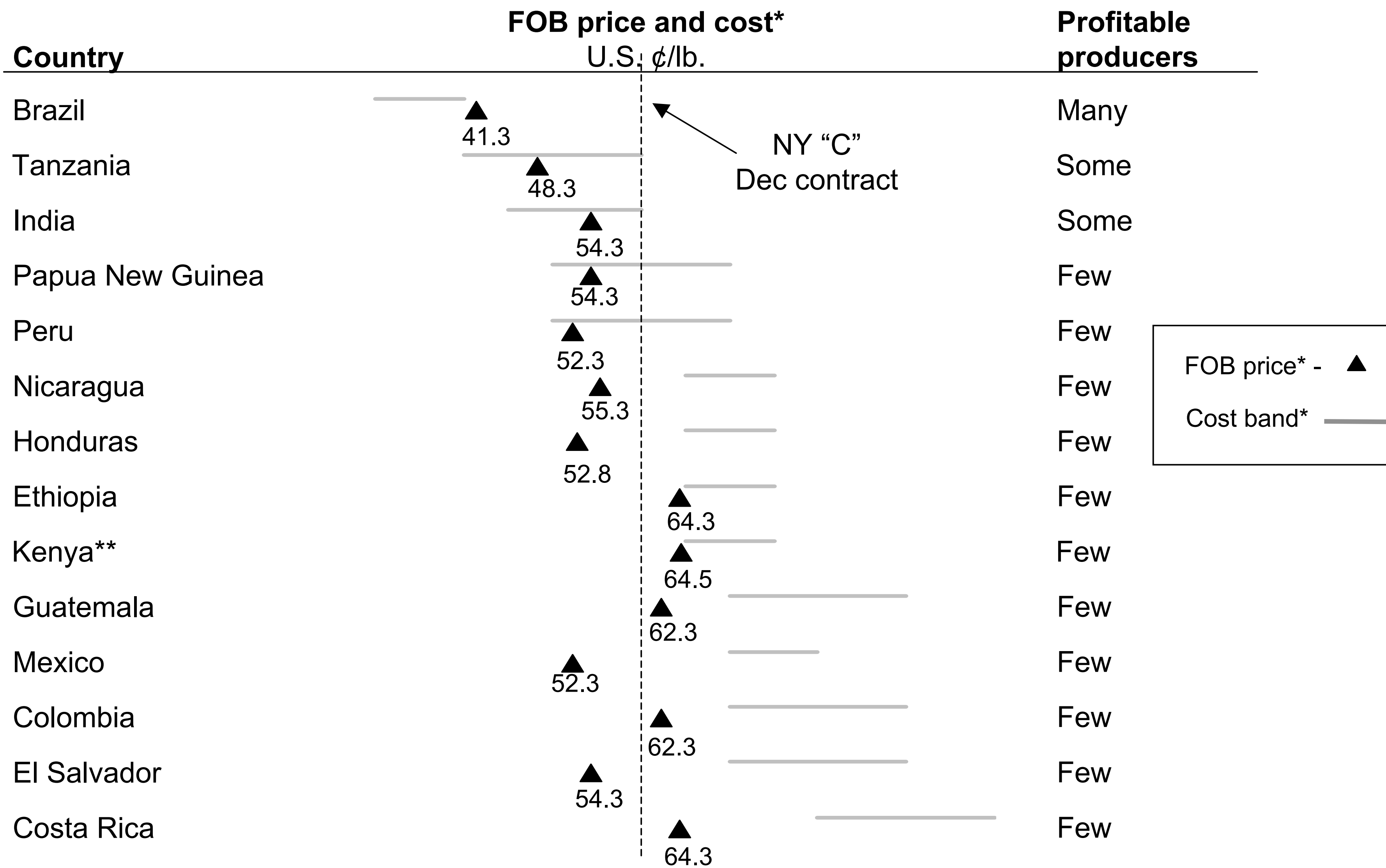
AT CURRENT PRICE LEVELS MANY PRODUCERS IN HIGHER COST COUNTRIES ARE NOT PROFITABLE



* December 2003 contract as of 12/1

Source: ICO; USDA; TechnoServe; Volcafe; Judith Ganes Consulting; Coffee Business International; "Dealing with the Coffee Crisis in Central America," World Bank (2003); team analysis

AND REGIONAL PRICE PREMIUMS DO NOT MAKE UP FOR HIGHER COSTS



* Price based on 12/01/03 New York “C” (59.6 c/lb) +/- current differential (differentials based on Complete Coffee Coverage and other industry estimates); costs are estimates based on data from compilation of sources; Tanzanian costs and price are weighted averages of small and larger growers based on country deep dives

** Cost estimated based on Ethiopia’s cost

Source: ICO; TechnoServe; Volcafe; Judith Ganes Consulting; Coffee Business International; “Dealing with the Coffee Crisis in Central America,” World Bank (2003); June 30, 2003 *Complete Coffee Coverage*; team analysis

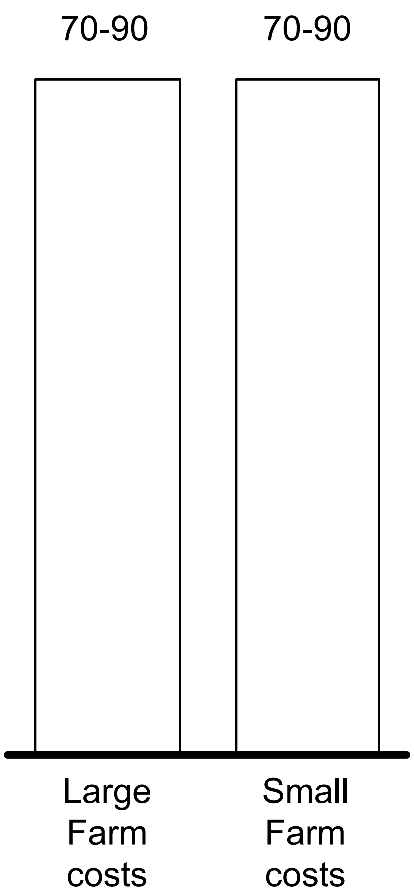
LARGE FARMS AND THEIR WORKERS HAVE BEEN PARTICULARLY HARD HIT

(cents per lb)

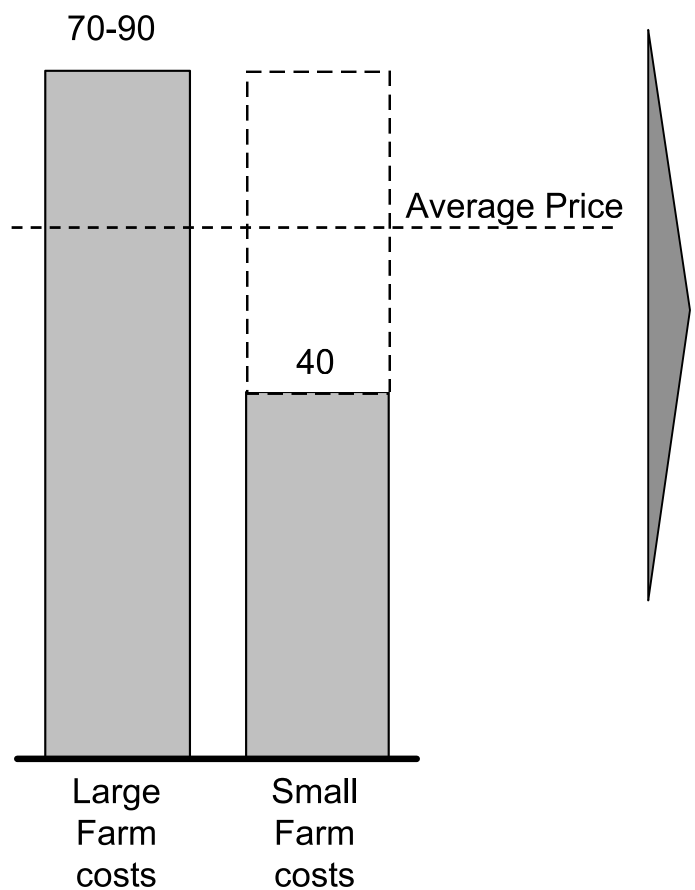
GUATEMALA EXAMPLE

Cash Expenses

There are few economies of scale…



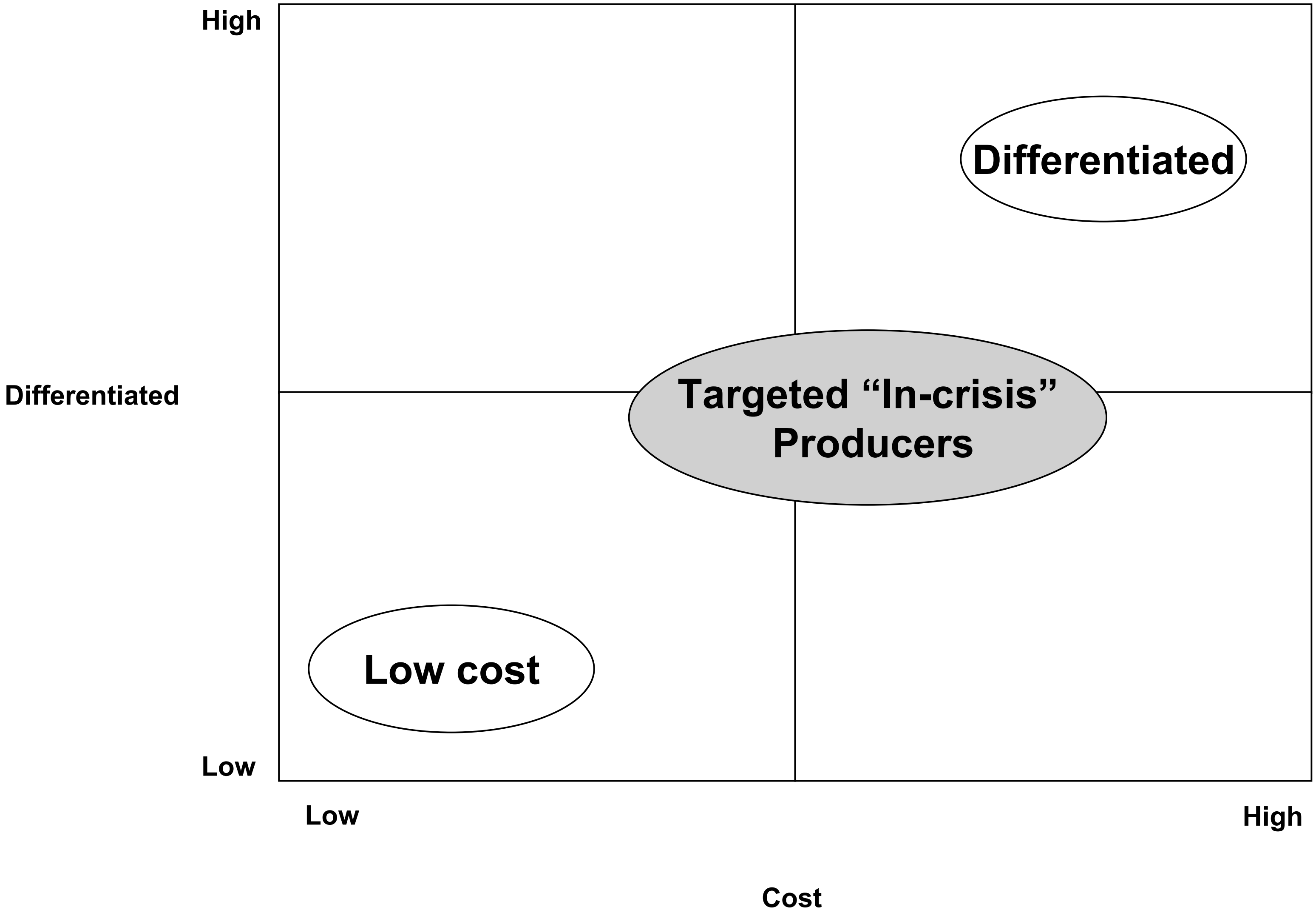
and large farms do not have access to non-cash family labor…



- Larger farms pay cash wages to workers rather than having access to non-cash family labor
- Higher cash expenses make it more difficult for larger farms to withstand price reductions
- 250,000 coffee workers in Guatemala have been laid off -- 30% of the coffee industry work force

Source: ICO; Unitrade; ANACAFE; team analysis

MARGINAL PRODUCERS THAT CANNOT DIFFERENTIATE OR COMPETE ON COST ARE UNLIKELY TO RETURN TO PROFITABILITY



CONTENTS

A RANGE OF POTENTIAL SOLUTIONS ARE ADVOCATED BY VARIOUS STAKEHOLDERS

Increase consumption

- **Increase Consumption** - Promote coffee consumption in producing countries and developing countries

Improve producer support

- **Risk Management** - Encourage producer use of risk management techniques (e.g., put options)
- **Market Information** - Facilitate transparency of information to producers (e.g., market information to create transparency of prices, improved crop forecasting to create transparency of supply)
- **Extension Services** - Improve coffee-related agricultural extension services (e.g., yield management)
- **Business Training** - Provide improved "business" awareness and ability
- **Vertical Integration** - Encourage producers to vertically integrate (e.g., into milling)
- **Roaster Relations** - Encourage long-term relationships between roasters and producers
- **Financing** - Provide access to financing (e.g., debt restructuring)

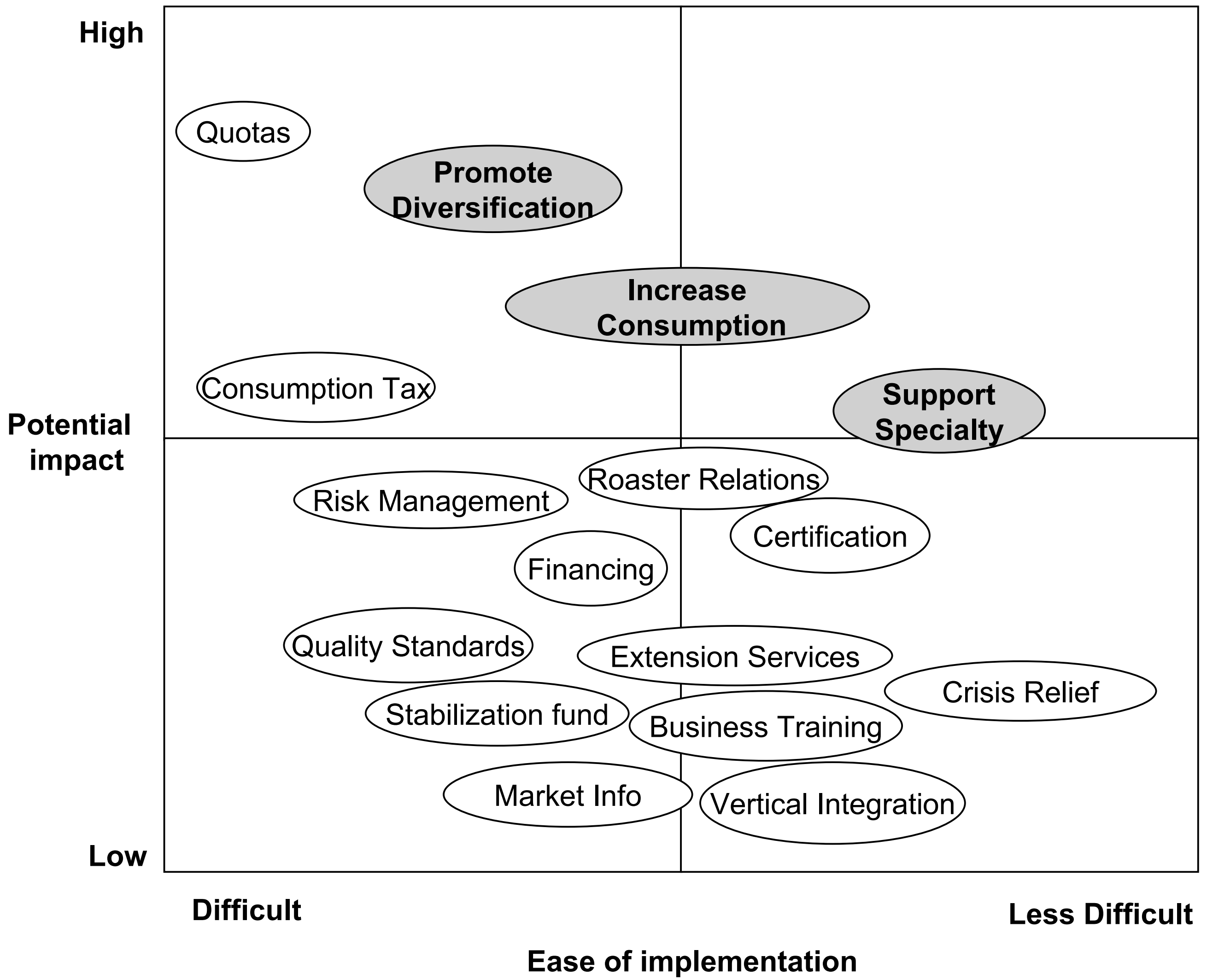
Transition in-crisis producers

- **Specialty** - Support move to improved quality ("specialty") coffee for advantaged producers
- **Certification** - Support certification and production of sustainable coffee for the specialty market (e.g., Fair Trade, organic, shade-grown/bird-friendly) and by large roasters (w/o price floor)
- **Diversification** - Promote partial or total diversification into alternative agricultural production and non-agricultural livelihoods (e.g., eco-tourism)

Apply macroeconomic policies

- **Quality Standards** - Institute quality resolutions to remove low-quality coffee from market
- **Stabilization Funds** - Provide long-term stabilization fund to minimize price volatility
- **Quotas** - Impose export quotas on coffee-producing countries
- **Tax Policy** - Reduce taxation on producers (country-specific)
- **Crisis Relief** – Provide relief for displaced coffee laborers
- **Protectionism** - Reduce US and European trade barriers to non-coffee products
- **Taxes** - Implement consumption tax on coffee

TECHNOSERVE BELIEVES THAT THREE MARKET SOLUTIONS OFFER THE HIGHEST POTENTIAL FOR SUSTAINABLE IMPACT



Potential Impact*

- Revenue - GDP increase
- Employment – Potential for job creation or preservation
- Scope – Broadly applicable or impacting a narrow segment
- Sustainability – Ability to preserve jobs/wealth over 5-20 year time frame

Ease of Implementation*

- Time Frame – Time required to generate economic growth
- Cost – Investment required
- Political Feasibility – Ability to reach stakeholder agreement and long term commitment
- Technical Feasibility – Complexity of solution and availability of local skills to implement

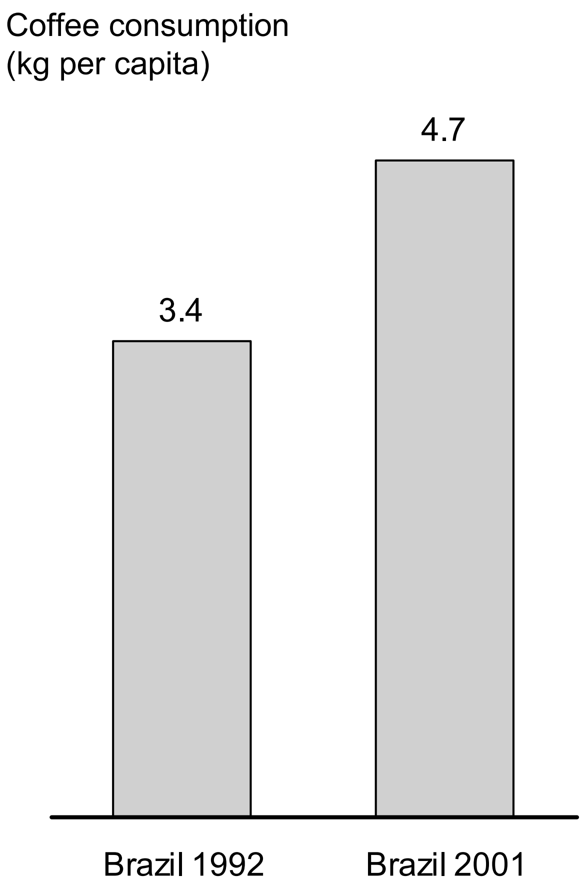
* These are qualitative assessments, opinions differ across the coffee industry on the potential relative impact of different solutions
Source: Team assessments

EACH OF THE THREE PRIORITY SOLUTIONS HAS THE POTENTIAL TO ASSIST DIFFERENT PRODUCER GROUPS

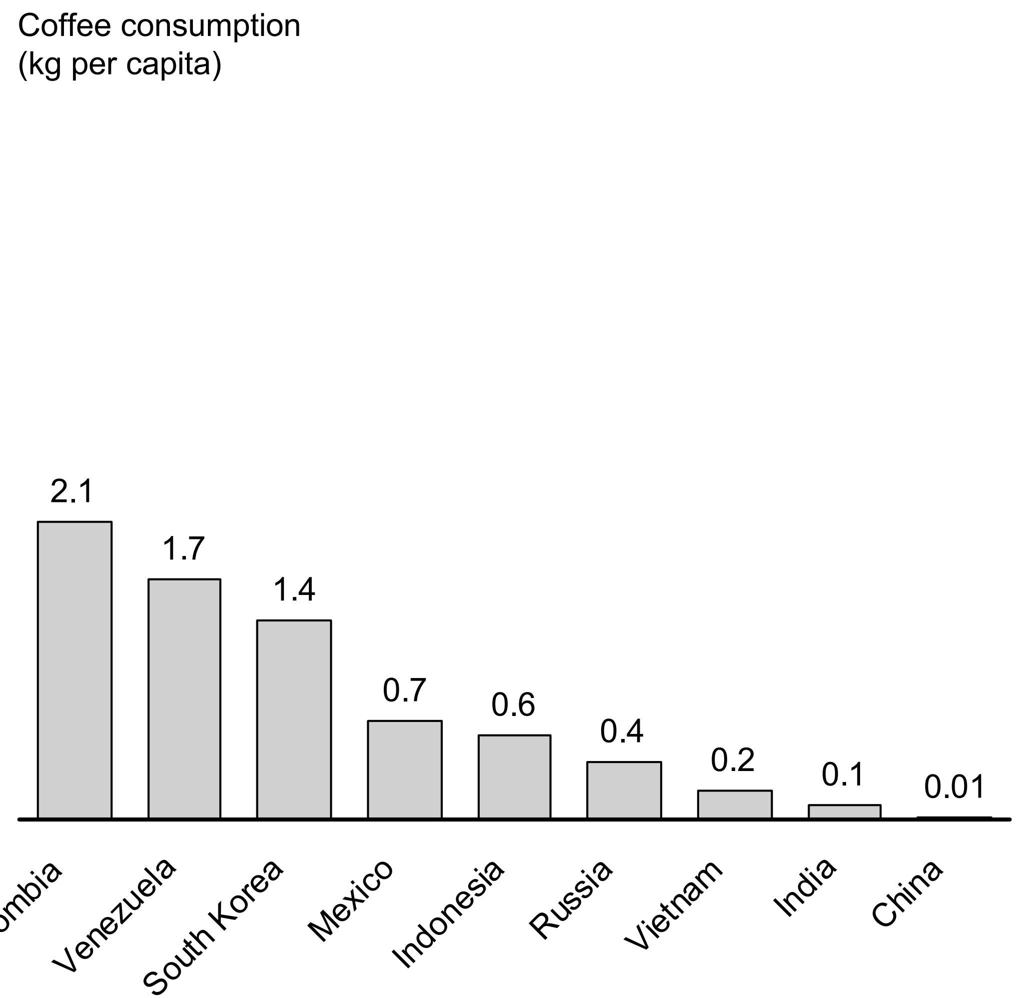
	Producer groups that benefit	Annual Revenue ($ millions)	One-time cost ($ millions)	Bags Impacted (millions)	Considerations
Increase consumption	• Producers with production costs below the long-term average price	340	60	5.0	• Brazil’s success in increasing consumption may be difficult to replicate in countries without a history of high coffee consumption • Increasing demand may increase the volume sold without increasing the long-term price and unprofitable producers may not benefit
Support specialty	• Unprofitable producers that have the potential to differentiate and receive price premiums	100	50	2.6	• This solution is only applicable to a small portion of producers • Price premiums may erode with increasing supplies of specialty coffee
Promote diversification	• Unprofitable producers that do not have the potential to differentiate	500	250	5.0	• For some producers/regions it may be difficult to identify viable economic alternatives

INCREASING CONSUMPTION COULD BENEFIT COFFEE PRODUCERS

Coffee consumption in Brazil increased by 40% in a 10-year period



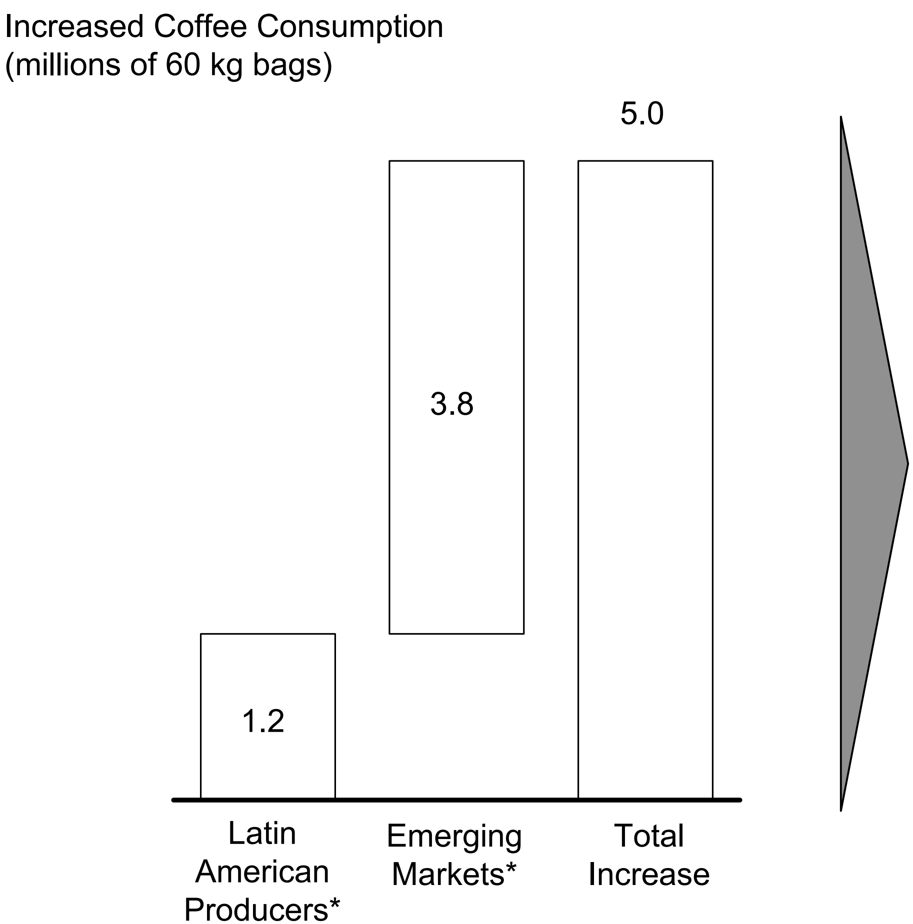
The potential may exist in other coffee producing countries and emerging market countries to replicate this increase in consumption



Source: Global Insight; ICO; team analysis

QUALITY AND MARKETING PROGRAMS COULD POTENTIALLY INCREASE CONSUMPTION

A 25% increase in per capita consumption in producer and emerging market countries would increase global demand by 5 million bags annually

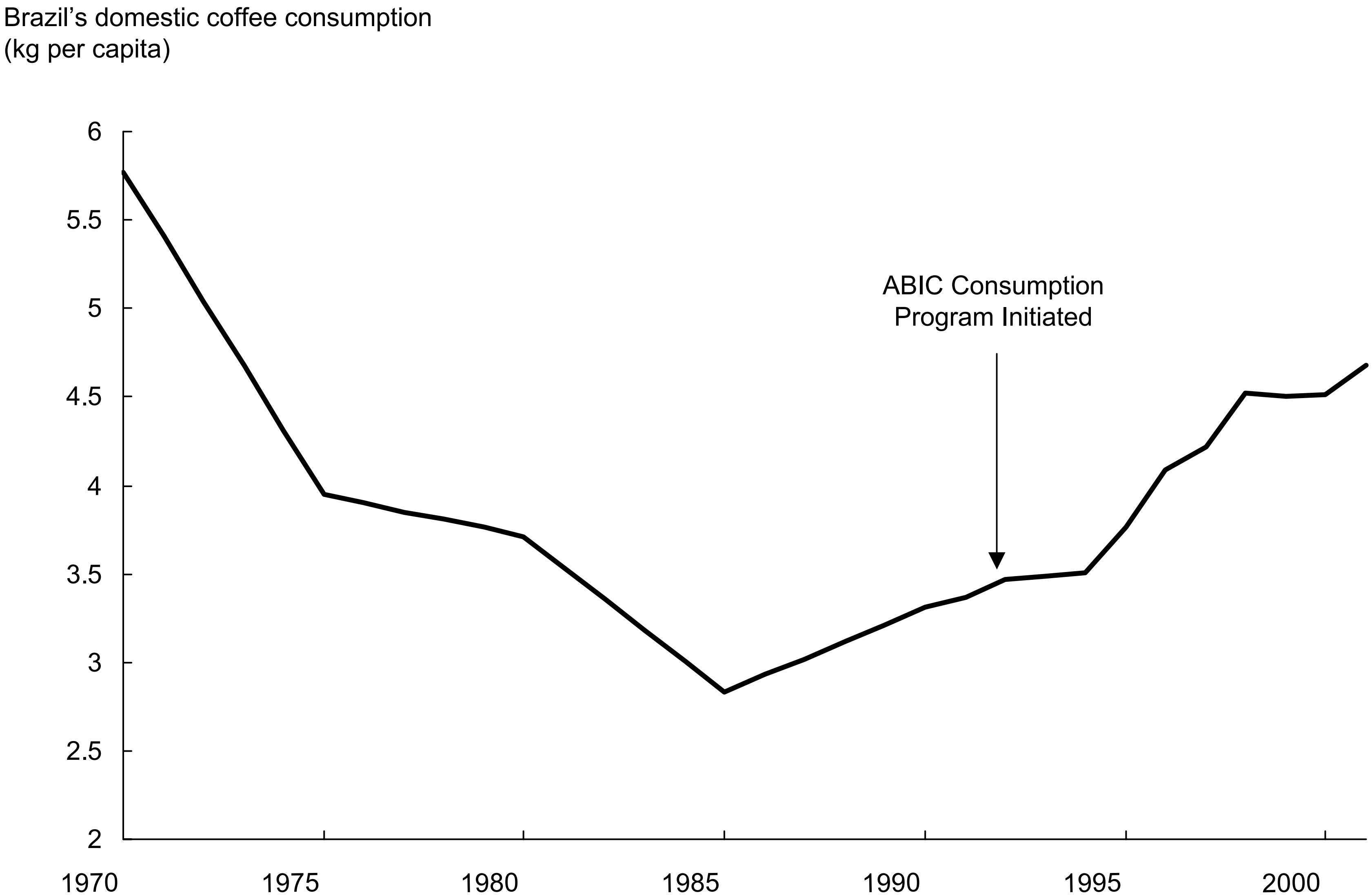


- Brazil's success in increasing consumption has been attributed largely to a quality program which included a purity certification
- A 25% increase in consumption in these countries may be feasible with programs similar to Brazil's
- Consumption programs would face varying cultural affinities for coffee, and a lack of scale in penetrating multiple smaller markets
- An increase in demand of this magnitude could increase consumption by 5 million bags which could increase revenue to coffee producers by $340 million annually **

* including 9 Latin America producing countries and 18 emerging market countries
**assuming a blended price of 52 cents/lb

Source: ICO, World Resources Institute, Team estimates

BRAZIL'S 40% CONSUMPTION INCREASE MAY BE DIFFICULT TO MEET IN COUNTRIES WITHOUT A HISTORY OF HIGH CONSUMPTION

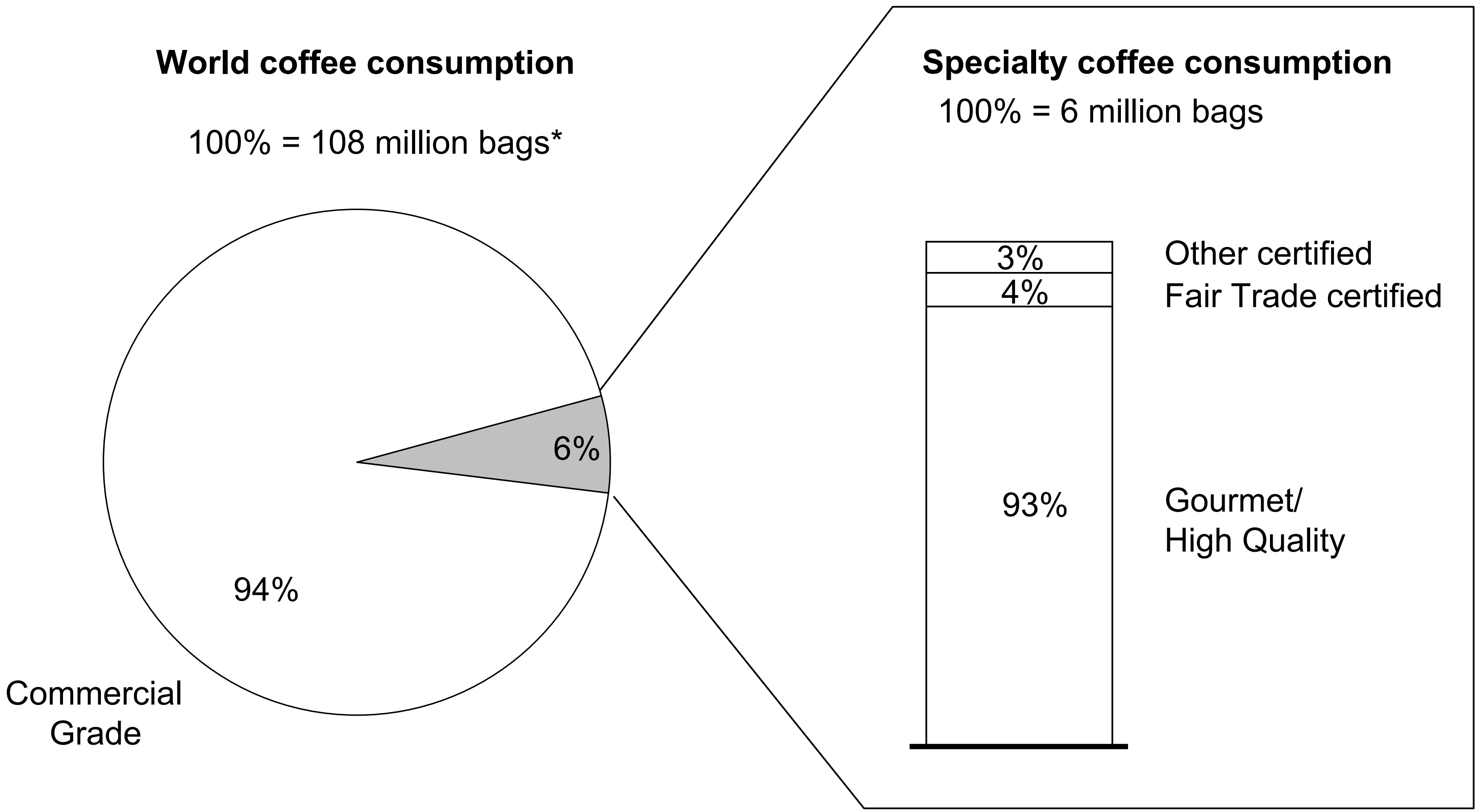


Source: ICO, ABIC

EACH OF THE THREE PRIORITY SOLUTIONS HAS THE POTENTIAL TO ASSIST DIFFERENT PRODUCER GROUPS

	Producer groups that benefit	Annual Revenue ($ millions)	One-time cost ($ millions)	Bags Impacted (millions)	Considerations
Increase consumption	• Producers with production costs below the long-term average price	340	60	5.0	• Brazil's success in increasing consumption may be difficult to replicate in countries without a history of high coffee consumption • Increasing demand may increase the volume sold without increasing the long-term price and unprofitable producers may not benefit
Support specialty	• Unprofitable producers that have the potential to differentiate and receive price premiums	100	50	2.6	• This solution is only applicable to a small portion of producers • Price premiums may erode with increasing supplies of specialty coffee
Promote diversification	• Unprofitable producers that do not have the potential to differentiate	500	250	5.0	• For some producers/regions it may be difficult to identify viable economic alternatives

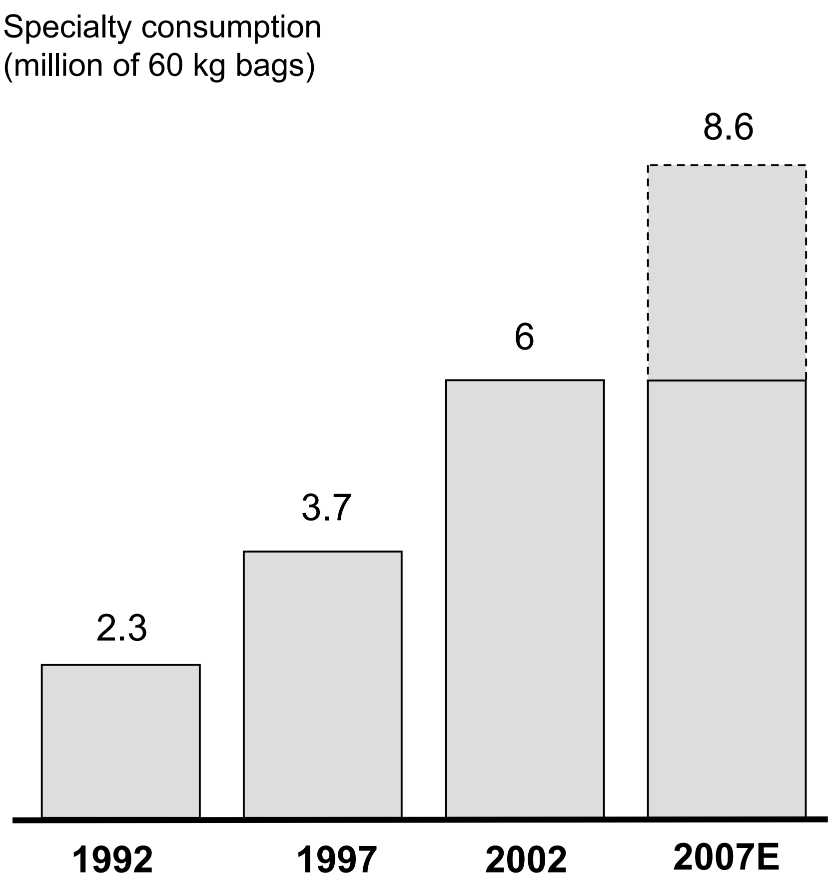
SPECIALTY COFFEE CURRENTLY REPRESENTS APPROXIMATELY 6 MILLION BAGS PER YEAR



*1 bag = 60 kgs
Source:ICO; Daniele Giovannucci; Team estimate

ROASTERS WILL REQUIRE A CONSISTENT SUPPLY OF QUALITY SPECIALTY GRADE COFFEE TO MEET THE GROWING DEMAND

Demand may grow by 2.6 million bags by 2007*



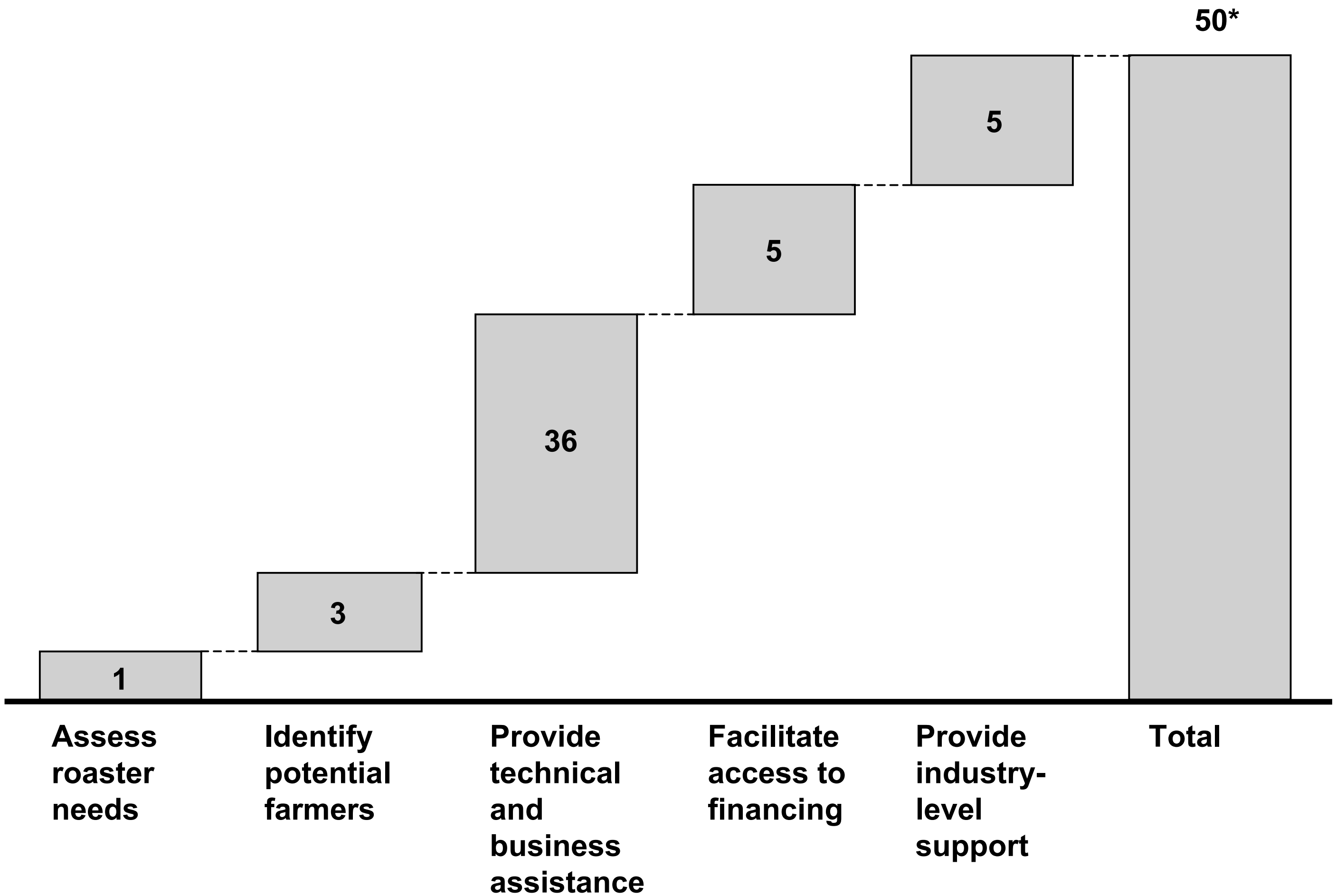
However this demand growth will require consistent supplies of quality specialty coffee

- Roasters are concerned that at current prices producers will not invest to assure consistent supplies of specialty quality coffee
  - Starbucks is establishing regional buying offices offices
  - Nestle has established a specialty mill in Costa Rica
- 2.6 million bags would bring $100 million in additional revenue annually to coffee podcucers assuming an average premium of 30 cents/lb
- This increase in specialty volume could potentially return 50,000 to 60,000 producers to profitability

* Growth estimates for the specialty market range from 5% to 10% annually
Source: SCAA; Team estimate

TECHNOSERVE ESTIMATES THAT IT COULD COST $50 MILLION OVER 5 YEARS TO ENSURE THIS SUPPLY OF SPECIALTY COFFEE

$ Millions



* Estimates based on the experiences of TechnoServe and other NGOs

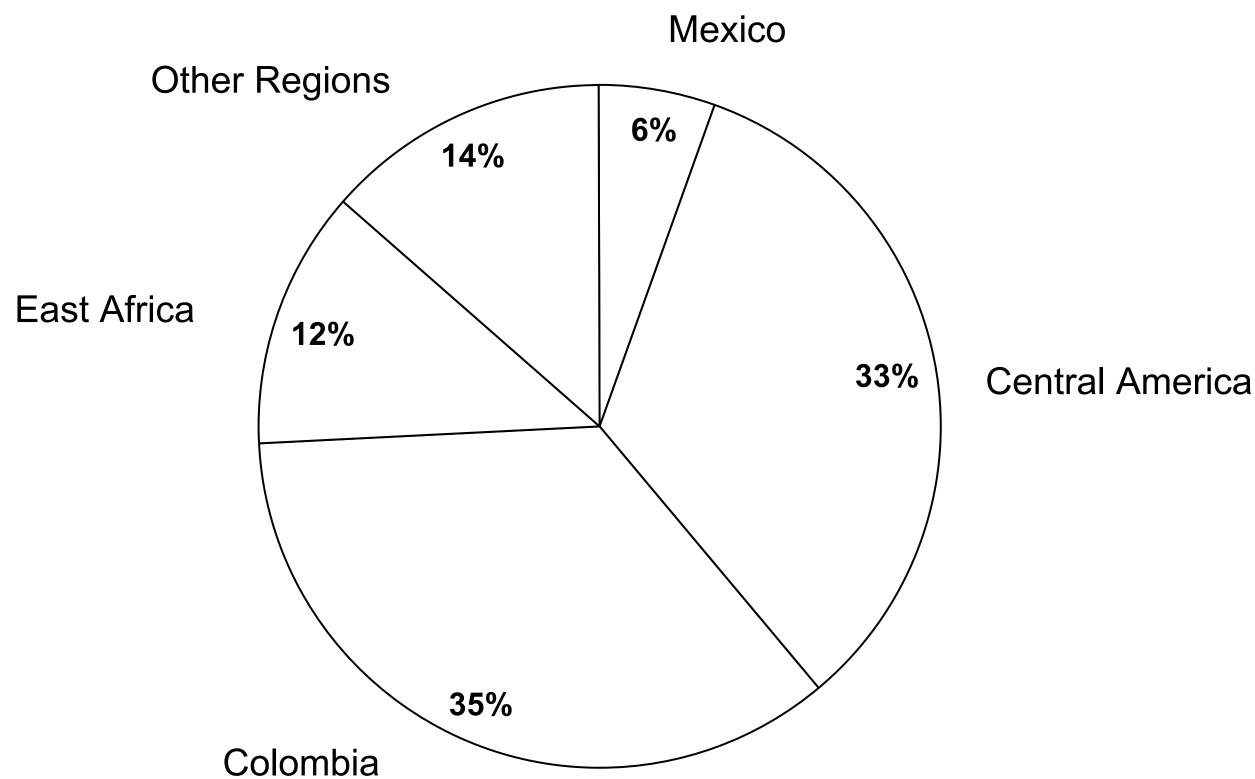
Source: Team estimate

THIS EFFORT SHOULD FOCUS ON HELPING COFFEE PRODUCERS MEET THE ROASTERS' STANDARDS

	Assess roaster needs	Identify potential farmers	Provide technical and business assistance	Facilitate access to financing	Provide industry-level support
Coffee Industry	• Define roaster needs based on market opportunities	• Participate in cupping competitions and auctions • Pursue longer-term relationships with farmers	• Give farmers feedback on quality • Provide hands-on support and training	• Provide financing to farmers with good track records	• Teach marketing seminars and participate in cupper trainings
NGOs	• Capture roaster needs • Communicate roaster needs to farmers	• Help organize cupping competitions and auctions • Identify high-potential farmers • Facilitate market linkages	• Improve yields and field processing • Improve wet milling facilities and techniques • Increase use of cupping	• Help access existing sources of financing • Set up fund for minor investments	• Coordinate marketing seminars and cupper trainings • Strengthen industry associations
Government		• Host coffee trade fairs		• Provide access to financing for working capital and equipment	• Address policy issues that constrain expansion of specialty coffee

SPECIALTY EFFORTS SHOULD FOCUS ON MEXICO, CENTRAL AMERICA, COLOMBIA, AND EAST AFRICA

2002 Specialty Coffee Production by Region



Source: SCAA

A NUMBER OF QUALITY INITIATIVES IN SPECIALTY COFFEE ARE UNDERWAY IN BOTH THE PUBLIC AND PRIVATE SECTORS

NGO/Multilateral Programs

Lead organization	Region	Timing	Budget
USAID	Central America	2003 - 2006	$4-8 million
USAID/CQI	Central America	2003 - 2005	$2 million
IDB	Central America	2003 - 2006	$4-5 million
USAID	East Africa	2003 - 2005	$2 million
USAID	Colombia	2003 - 2008	$7 million
TechnoServe/P&G	Central America	2002 - 2012	$1.5 million
Cup of Excellence Program	Brazil/Central America	Indefinite	$1 million annually

Private Sector Programs

Type	Company/Group
Certified Marketing Programs	Dunkin' Donuts, Kraft, Peet's Coffee & Tea, P&G, Sara Lee, Starbucks
Buying Offices	Starbucks
Sustainability Programs	Starbucks, Volcafe
Standards	SAI, SCI, CCCC

Note: A representative sampling of programs and initiatives

EACH OF THE THREE PRIORITY SOLUTIONS HAS THE POTENTIAL TO ASSIST DIFFERENT PRODUCER GROUPS

	Producer groups that benefit	Annual Revenue ($ millions)	One-time cost ($ millions)	Bags Impacted (millions)	Considerations
Increase consumption	• Producers with production costs below the long-term average price	340	60	5.0	• Brazil's success in increasing consumption may be difficult to replicate in countries without a history of high coffee consumption • Increasing demand may increase the volume sold without increasing the long-term price and unprofitable producers may not benefit
Support specialty	• Unprofitable producers that have the potential to differentiate and receive price premiums	100	50	2.6	• This solution is only applicable to a small portion of producers • Price premiums may erode with increasing supplies of specialty coffee
Promote diversification	• Unprofitable producers that do not have the potential to differentiate	500	250	5.0	• For some producers/regions it may be difficult to identify viable economic alternatives

HIGH-COST PRODUCERS WHO CANNOT DIFFERENTIATE NEED TO FIND ALTERNATE SOURCES OF INCOME

Competitive position

- Many high-cost producers of medium and low-grade coffee are unlikely to return to profitability
- Even if prices increase, low-cost producers and/or new entrants are likely to increase production

Potential resistance to diversification

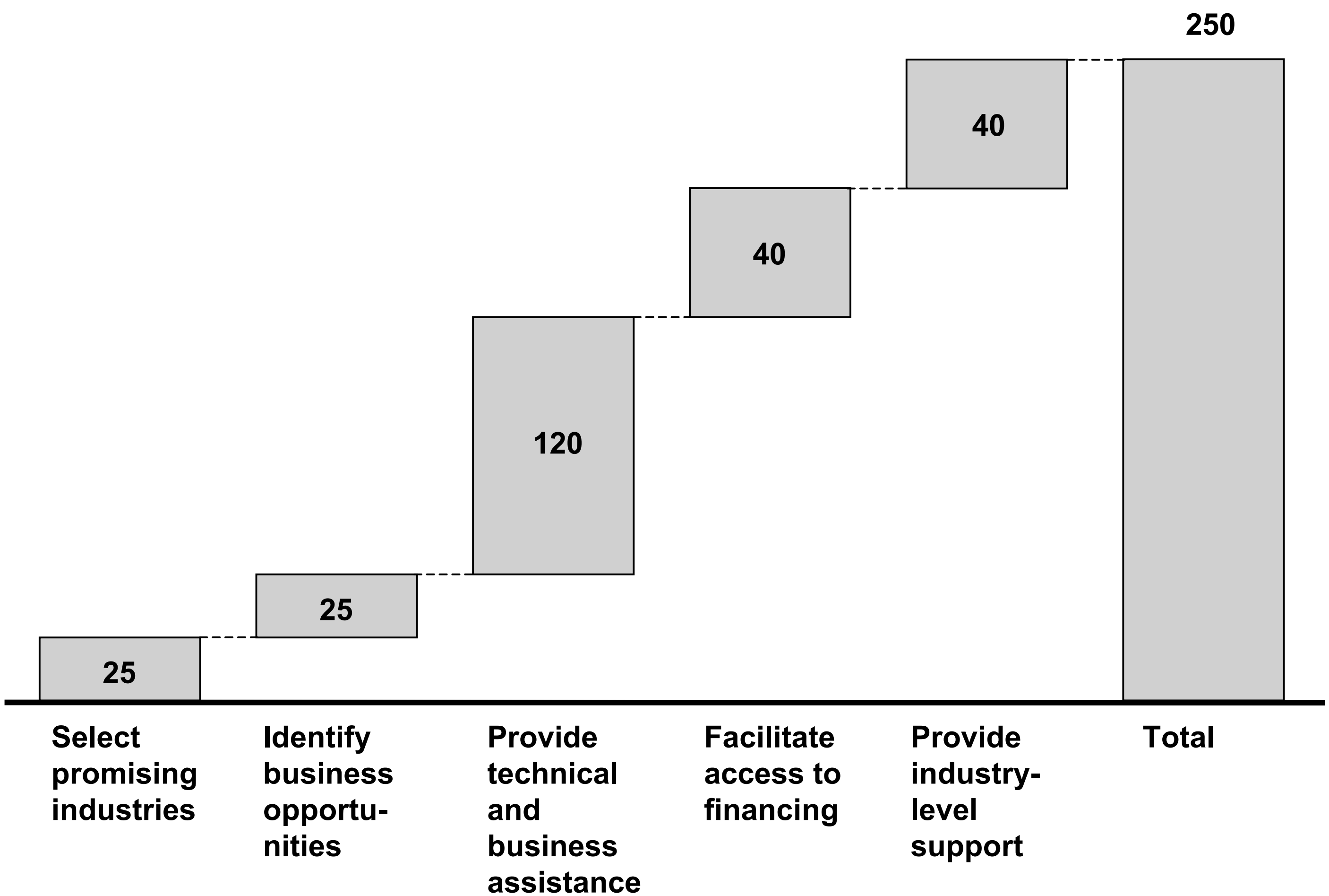
- There is a long-standing cultural attachment to coffee that is difficult to break
- Experience with previous cycles has set the expectation that prices will rise in the future
- Producers who are operating close to profitability will be highly unlikely to consider diversification

Diversification Goal

- To diversify regional economies and reduce the dependence on coffee, TechnoServe estimates that alternative industries must be developed with the potential to generate $500 million in annual revenue

CREATING INDUSTRIES TO GENERATE $500 MILLION IN ANNUAL REVENUE WOULD COST UP TO $250 MILLION OVER A 5-YEAR PERIOD

$ Millions



Source: Team estimate

DIVERSIFICATION NEEDS TO FOCUS ON INTRODUCING COMPETITIVE INDUSTRIES FOR REGIONS, NOT ON CROPS FOR INDIVIDUAL FARMERS

Approach	Rationale
• Promote economic diversification at a regional level rather than at a farm level	• A significant portion of the economic development in new industries is likely to take place outside existing coffee farms
• Work with coffee producers and local entrepreneurs	• Coffee producers may not be the pioneer entrepreneurs of new industries

SPECIFIC DIVERSIFICATION INDUSTRIES WILL BE IDENTIFIED FOR EACH REGION

Identify all potential industries

Prioritize based on a series of screens

To focus on set of opportunities

Industries suitable for a specific region

Market Potential

Country Competitiveness

Best Alternatives

1. Possible Industries
- Agro-climatic feasibility
- Import substitutes
- Value added processing of existing products
- New opportunities based on local advantage

2. Attractive Opportunities
- Potentially attractive domestic or export market
- Size of investment required and potential margins available

3. Potential for Success
- Definable competitive advantage
- Technical complexity
- Infrastructure investments required
- Feasibility of establishing market links

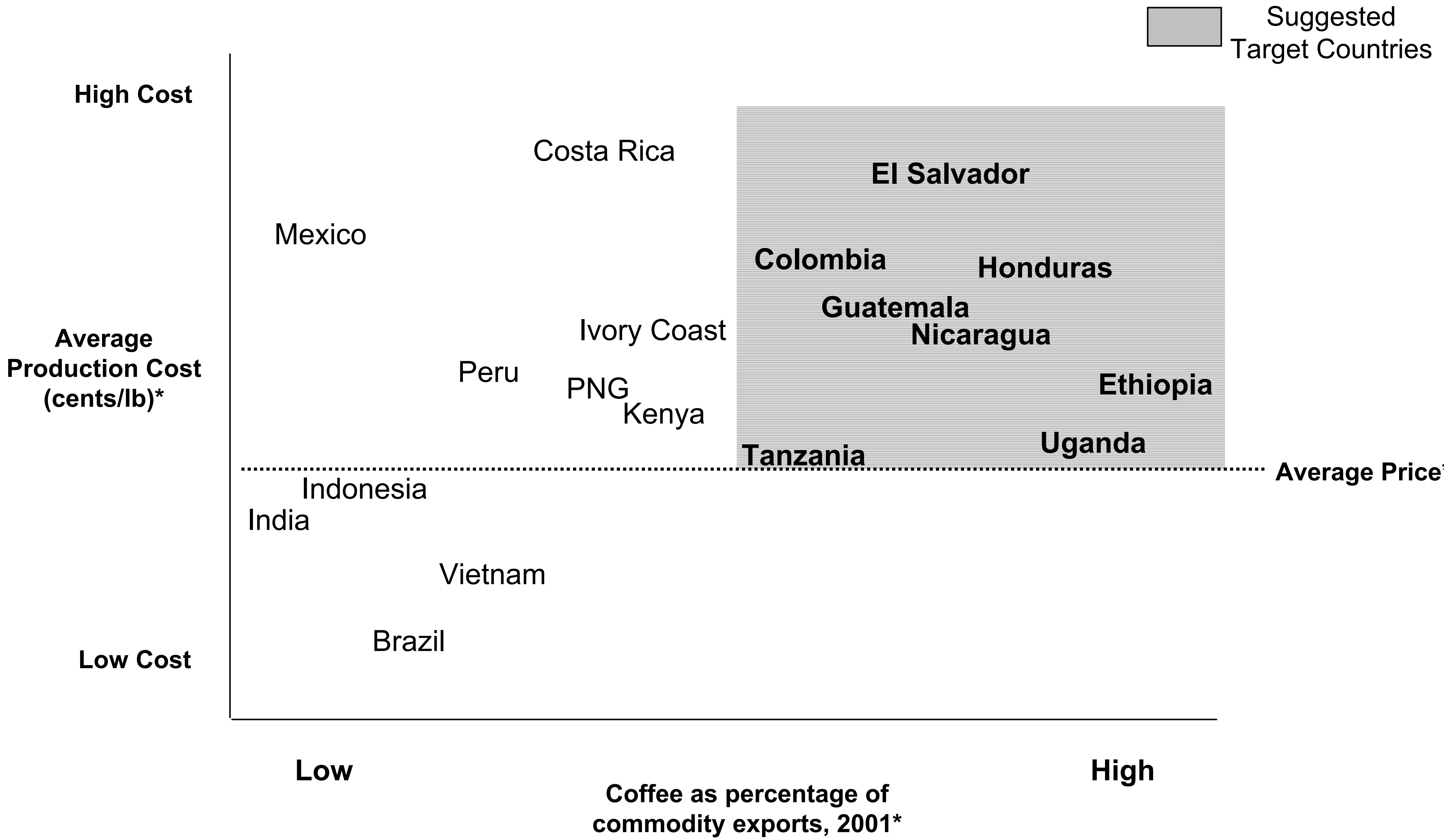
NO SINGLE INDUSTRY IS LIKELY TO BE IDEAL FOR A TARGETED REGION

Example Industries	Advantages	Drawbacks
Fruits and vegetables	• Large and growing market • Generator of employment and quick cash flow	• Need for good roads to markets • Investment in infrastructure required • Perishable product
Ornamental plants	• Growing market • Generator of employment and quick cash flow	• Highly demanding market • Large investment in infrastructure required • Delicate product
Cocoa	• Large market and good prices • Production, processing, and marketing similar to that for coffee	• Commodity crop subject to sharp fluctuations in prices • Risk of oversupply in several years
Cattle	• Viable market for meat and dairy products	• Need for relatively gentle slopes • Environmental damage due to clearing of land
Forestry and timber	• Good market opportunities, especially for tropical hardwoods • Positive impact on environment	• Limited generator of employment • No short-term cash flow
Eco-tourism	• Growing market • High-value industry	• Relatively small industry • Longer-term investment

SUCCESSFUL IMPLEMENTATION WILL REQUIRE THE COORDINATED INVOLVEMENT OF THE PRIVATE SECTOR, NGOs AND GOVERNMENTS

	Select promising industries	Identify business opportunities	Provide technical and business assistance	Facilitate access to financing	Provide industry-level support
Private Sector	• Provide support in selection of industries	• Explore new business opportunities	• Share best practice examples	• Provide financing to entrepreneurs	• Teach marketing and technical seminars • Help build indus-try associations
NGOs	• Assess market potential and country com-petitiveness for each industry • Help select 3 to 5 industries per country	• Identify entrepreneurs • Facilitate market linkages	• Develop busi-ness plans • Strengthen operations and quality control • Provide support in management and accounting	• Help access existing sources of financing • Set up fund for minor invest-ments	• Coordinate marketing and technical seminars • Strengthen industry associations
Governments	• Participate in selection of promising industries	• Host industry trade fairs		• Provide access to financing for investments in equipment	• Address policy and infrastructure issues that con-strain industry growth

DIVERSIFICATION SHOULD BE FOCUSED ON COUNTRIES THAT ARE NOT COST COMPETITIVE AND ARE HIGHLY DEPENDENT ON COFFEE



* Cost positions are adjusted to reflect the relative prices differentials received by specific countries

Source: USDA; ICO Coffee Statistics, Sept 2002; Complete Coffee Coverage; TechnoServe; Economist Intelligence Unit; team analysis

WHILE DIVERSIFICATION HAS THE POTENTIAL TO HAVE A LARGE IMPACT, FEW TARGETED PROGRAMS HAVE BEEN INITIATED

Current Status

There are many ongoing projects to promote the development of new industries, but very few of these projects specifically aim to promote diversification in coffee-producing regions.

Contributing Factors

It appears that few diversification efforts exist to date because -

- There is a concern that diversification products will be abandoned if coffee prices rise
- There is no single industry or public organization driving diversification
- There is a preconception that there are no viable diversification alternatives.

CONTENTS

NEXT STEPS

	Action	Responsible
Increase consumption	• Complete study undertaken to identify and document best practice in consumption programs • Initiate targeted consumption programs in select countries	• ICO • Coffee Industry
Support specialty	• Identify regions requiring additional focus among the existing specialty programs (e.g. East Africa) • Encourage coordination among organizations to share best practice learning, especially in Central America	• NGOs • NGOs, Funders
Promote diversification	• Identify specific regions for pilot diversification programs • Secure funding for selected regions • Initiate programs and identify industry alternatives for each of the regions	• NGOs, Governments • NGOs • NGOs, Funders, Private Sector

ACKNOWLEDGEMENTS

TechnoServe wishes to acknowledge and thank the following individuals, companies and organizations for expressing their support and offering to provide information and guidance as we worked to find business solutions that will help coffee growers, their workers and producer countries to weather this crisis.

An 18-member Advisory Council -- including representatives from various countries, regions and entities in the coffee industry -- has guided the McKinsey & Company team, assisted with data gathering and reviewed McKinsey & Company's findings and TechnoServe's report and recommendations. Independent anti-trust counsel also participated in all Advisory Council meetings.

- Gerald Baldwin—Chairman Emeritus, Peet’s Coffee & Tea
- Carlos Brando—Director, P&A Marketing
- Henry Dunlop—President, Atlantic (USA), Inc.
- Markus Fischer—Volcafe, Sustainability Coordinator
- Steve Gluck—Former President, Cargill Coffee Department, Cargill, Inc.
- Hidetaka Hayashi—Hayashi Coffee Institute
- Ted Lingle—Executive Director, Specialty Coffee Association of America
- Sandy McAlpine—President, Coffee Association of Canada
- Paul Mugambwa—Chairman, East Africa Coffee Association
- Karin Nelsen—Anti-Trust Legal Counsel, Cargill, Inc.
- Nestor Osorio—Executive Director, International Coffee Association
- Paul Rice—Executive Director, TransFair USA
- Gabriel Silva—General Manager, Federacion Nacional de Cafeteros de Colombia
- Spencer Turer—Global Coffee Supply Manager, Dunkin’ Donuts – Allied Domecq QSR
- Roel Vaessen—Secretary General, European Coffee Federation
- Greg White—Director, Green Coffee, Procter & Gamble
- Annemieke Wijn—Senior Director, Commodity Sustainability Programs, Kraft Foods Inc.
- Carol Wilson—Coffee Specialist, U.S. Agency for International Development
- Mary Williams—Coffee Buyer (Ret.), Starbucks

A total of 68 coffee industry stakeholders enrolled in support of TechnoServe's and McKinsey & Company's global coffee industry analysis, including major roasters, small coffee producers, specialty companies, exporters, key non-profit organizations and distributors. By enrolling, these stakeholders agreed to support the analysis by providing relevant information and agreeing to be interviewed by the McKinsey & Company team.

The enrollees are:

- Atlantic
- Applied Food Sciences
- Associacion de Cafes Especiales de El Salvador (El Salvador)
- Associacion Café Itzalco de El Salvador (El Salvador)
- Association of Kilimanjaro Specialty Coffee Growers (Tanzania)
- Beantrends (Canada)
- Beneficio El Paraiso, SA de CV (El Salvador)
- Boot Coffee Company
- Burka Coffee Estate (Tanzania)
- CAFECOM, S.A. (Guatemala)
- Café Ole (Panama)
- Café Sombra (Brazil)
- Canada Coffee Association
- Coffee America (USA)
- Coffee Enterprises
- Coffee Quality Institute
- Colombian Coffee Federation
- Colorado Trading Company
- Cooperativa Cuzcachapa de R.L. (El Salvador)
- Cooxupe-Santos (Brazil)
- Dallis Brothers
- DeCoty Coffee Company
- Diedrich Coffee
- Dunkin’ Donuts
- East Africa Fine Coffees Association
- ESMAR, S.A. de C.V. (El Salvador)
- Esperanza Coffee Group S.A. (Nicaragua)
- European Coffee Federation
- FEDECOCAGUA (Guatemala)
- Federación Nacional de Cafeteros de Colombia (Colombia)
- Fres-co System USA
- J. Ganes Consulting, LLC
- F. Gavina & Sons
- Hayashi Coffee Institute (Japan)
- ICAFE (Costa Rica)
- IHCAFE (Honduras)
- International Coffee Organization
- Kilimanjaro Coffee Company (Tanzania)
- Kraft Foods
- La Majada Cooperative (El Salvador)
- Lamas Coffee (Peru)
- LM Zuckerman
- Mercon Coffee
- M'ringa Estate Ltd. (Tanzania)
- National Coffee Association
- Nestle USA
- Neumann Gruppe (Germany)
- Oxfam International (USA/Europe)
- P&A Marketing Internacional (Brazil)
- Peet's Coffee & Tea
- PRODECOOP (Nicaragua)
- Prodelsur (Peru)
- Procter & Gamble
- Quantum Coffee Inc.
- Racafe & CIA (Colombia)
- Rombo Millers Company Ltd. (Tanzania)
- Royal Cup Inc.
- Sara Lee Coffee & Tea
- Silocof of New Orleans
- Specialty Coffee Association of America
- Specialty Coffee Association (Costa Rica)
- Tanzania Coffee Association
- Tanzania Coffee Board
- Tanzania Coffee Growers Association
- Tchibo (Germany)
- TransFair USA
- Varzea da Onca (Brazil)
- Volcafe (Switzerland).