Colombia coffee consumption figures

<table>
<thead>
<tr>
<th>Year</th>
<th>INCIDENCE</th>
<th>CUPS PER DAY</th>
<th>ANNUAL SALES</th>
<th>INCIDENCE</th>
<th>CUPS PER DAY</th>
<th>ANNUAL SALES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996</td>
<td>87.8%</td>
<td>3</td>
<td>USD 1,133 Million COP 3.5 Billion</td>
<td>30</td>
<td>91</td>
<td>68</td>
</tr>
<tr>
<td>2007</td>
<td>82%</td>
<td>2.9</td>
<td></td>
<td>2</td>
<td>86%</td>
<td>3</td>
</tr>
<tr>
<td>2012</td>
<td>82%</td>
<td>ND</td>
<td></td>
<td>300.000 POP</td>
<td>250 SKUs</td>
<td>Present in 9/10 retail shops</td>
</tr>
<tr>
<td>2015</td>
<td>86%</td>
<td>3.4</td>
<td></td>
<td>300.000 POP</td>
<td>250 SKUs</td>
<td>Present in 9/10 retail shops</td>
</tr>
</tbody>
</table>

Source: REINOVA, RADDAR, FNC,

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After a 23 year contraction, Toma Café helped boost domestic coffee consumption.

Toma Café started in an adverse context

Variation consumer basket

Advertising investment

Source: Nielsen Reatil Index

Source: IBOPE Media

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Toma Café contributed to an 11% retail market growth for Premium coffee becoming the fastest growing segment (now 5% share)

Consumption evolution

Premium coffee segment growth

Source: Nielsen Retail Index

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Ruta

Raise awareness

Stimulate consumption

Promote adherence

Promotion

More opportunities

Coffee Science

Fewer Barriers

Innovation

Research and knowledge transfer

Competitiveness

Training of trainers

Industry – FNC Coalition

Stimulating effective demand

Scientific Societies

Mass Media

National Education Service

Chambers of Commerce

Cities

States

Strengthening the offer

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A coalition – competition model

Coalition

- Complementizers
- Multiplicators
- Legitimizers
- Educators
- Consumers
- Substitutes

Scientific Societies
Mass Media
MD, ND Professionals

Milk
Sugar and panela
Equipment

Baristas
Food and beverage personnel
Distribution Channels

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Thank you