THE ICO’S STEP-BY-STEP GUIDE TO PROMOTE COFFEE CONSUMPTION IN PRODUCING COUNTRIES IN PRACTICE: LESSONS AND RECOMMENDATIONS
A STEP-BY-STEP GUIDE TO PROMOTE COFFEE CONSUMPTION IN PRODUCING COUNTRIES

- Released in 2004
- Based on cases of Brazil and many other countries
  - positive examples
  - negative examples
GUIDE INSPIRED AND PROVIDED METHODOLOGY FOR PROGRAMS IN SEVERAL COUNTRIES

- India (2006)
- Mexico (2006)
- Indonesia (2006)
- El Salvador (2007)
- Costa Rica (2008/09)
- Colombia (2010/16)

- Many programs created
- Different lessons learned

GUIDE PROVIDED IDEAS/METHODOLOGY FOR PROMOTION ACTIONS IN OTHER COUNTRIES
IT IS TIME TO UPDATE THE ICO GUIDE

- Incorporate experiences from
  - programs
  - actions
  that used Guide

- Changes in “environment”
  - digital world
  - coffee market
  - coffee preparation
  - demography

- Other trends and opportunities
  - countries where consumption grows without programs
  - sustainability   •   other

A LOT HAPPENED IN A RELATIVELY SHORT TIME
INCORPORATE EXPERIENCE FROM USE OF GUIDE

- Analyze applications
  • success
  • failures
  • other

- Why not used more intensely?

- Why not better results?

- What shape should a new version take?
NEW DIGITAL WORLD: HABITS AND MEDIA

DIGITAL TECHNOLOGIES

CONNECTIVITY AND MOBILITY

DIGITAL TRANSFORMATION (SOCIAL + ECONOMIC)

DIGITAL COMMUNICATION (INTERNET)

CHANGING BUYING PATTERNS (E-COMMERCE)

DIGITAL CHANGE OF HABITS

E-MARKETING

“GO VIRAL”
(BREXIT - TRUMP - BOLSONARO)
**Digital Around the World in 2019**

The essential headline data you need to understand global mobile, internet, and social media use.

**Total Population**
- 7.676 billion
- Urbanisation: 56%

**Unique Mobile Users**
- 5.112 billion
- Penetration: 67%

**Internet Users**
- 4.388 billion
- Penetration: 57%

**Active Social Media Users**
- 3.484 billion
- Penetration: 45%

**Mobile Social Media Users**
- 3.256 billion
- Penetration: 42%

**Sources:**
- Population: United Nations, U.S. Census Bureau
- Mobile: GSMA Intelligence
- Internet: Internet World Stats, ITU, World Bank, CIA World Factbook, Eurostat
- Local government bodies and regulatory authorities, MideastMedia.org, reports in reputable media
CHANGES IN COFFEE MARKET: THIRD WAVE AND MORE

EXPERIENCE

MICRO LOTS

CONSUMER BETTER INFORMED

NEW PROCESSES AND FLAVORS

NEW PREPARATION METHODS

ORIGINS

IMPACT IN PRODUCING COUNTRIES
CHANGES IN COFFEE PREPARATION

2012-2017

Source: Euromonitor

ANNUAL GROWTH RATE
DEMOGRAPHIC CHANGES

- Linear increase in population over time.
- Non-linear increase in income over time.
- Age pyramid illustrating the distribution by age and gender.
COUNTRIES WHERE CONSUMPTION GROWS WITHOUT PROGRAMS

- INDONESIA: largest market of Southeast Asia
  - 30% of market is “3 in 1” coffee

- CHINA: coffee consumption grows 15% per year
  - but per capita consumption still low

- RUSSIA: soluble is 70% of the market
  - youngsters push specialty (shops)

- EASTERN EUROPE: growth returns

- VIETNAM: consumption represents already 1 kg/capita
  - soluble grows more than 10% per year

ANALYZE - UNDERSTAND - USE / INCORPORATE
NEW CONSUMPTION DYNAMICS IN US MARKET

- Surprising growth rates
- Is it Third Wave only?

ANALYZE - UNDERSTAND
REPLICABLE? - USE / INCORPORATE
COFFEE AND HEALTH

COFFEE AND WELLBEING

SUSTAINABILITY?

OTHER?
UPDATED GUIDE

- APPROACH
- STRATEGIES
- TOOLS

GUIDE ITSELF
THANK YOU!