Photo from Microsoft Stock Images

Eleonora Escalante Strategy
presents
the Summer Saga of the year

Cacao and Coffee 101.

Success strategies for Small Farm Holders

Episode 6.

Customer Segments

Version 2.0 (assessed and corrected).

www.eleonoraescalantestrategy.com

Cacao and Coffee 101.
Success Strategies for Small Farm Holders

Next saga:
Human Talent:
From Feudal Slaves to Digital Beggars.
As of October 1st

Outline Calendar *One Season: From May 22nd to September 11th, 2026*

22-May Episode 1 ✓ Introduction	29-May Episode 2 ✓ A new philosophy beyond circular economy	5-June Episode 3 Sustainability: Beyond caring for the land Part I	12-June Episode 4 ✓ Sustainability: Beyond caring for the land Part II	17-22 June Teacher´s week Pedagogical Pause El Salvador Happy Teacher's Day	26-June Episode 5 ✓ New Models of Ownership & Corporate Governance
3-July Episode 6 ✓ Customer Segments	10-July Episode 6A ✓ Customer Segments Version 2.0	17-July Episode 7 Value Propositions I	24-July Episode 8 Value Propositions II	31-July Episode 9 Distribution Channels	07-August Episode 10 We will work on vacations Certifications Quality Control FAIRTRADE
14-August Episode 11 Key Resources	21-August Episode 12 Revenue Streams Cost Structure	28-August Episode 13 Competitiveness, Research & Innovation	04-Sept Episode 14 Financing & Access to Capital	11-Sept Episode 15 Key Partnerships	18-September Episode 16 Epilogue Summary Conclusions Research Agenda

This outline is subject to change if the author considers it appropriate for your learning experience.

Eleonora Escalante Strategy
State of the Art Corporate Strategy

Customer Segments

AGENDA

Cacao and Coffee 101. Success Strategies for Small Farm Holders

1. What is imported by the midstream & downstream? What is exported by the upstream, and re-exported by the midstream?
2. Selection of 3 possible customer segments for Small-Farm holders using the AOC/PDO system
3. Next week: Construction of the 3 CVPs

Photo Source: Microsoft Stock Images

COFFEE INTERNATIONAL TRADE

Analysis 2023-2024

9/7/2026

Customer Segments

What is imported by the midstream & downstream?

Note: We reviewed again the Coffee Global Imports 2024 database from World Bank WITS and UNComtrade is complete and include all the main relevant nations involved in trade.

All the references cited and used for our inferences are shown in slide 35-36

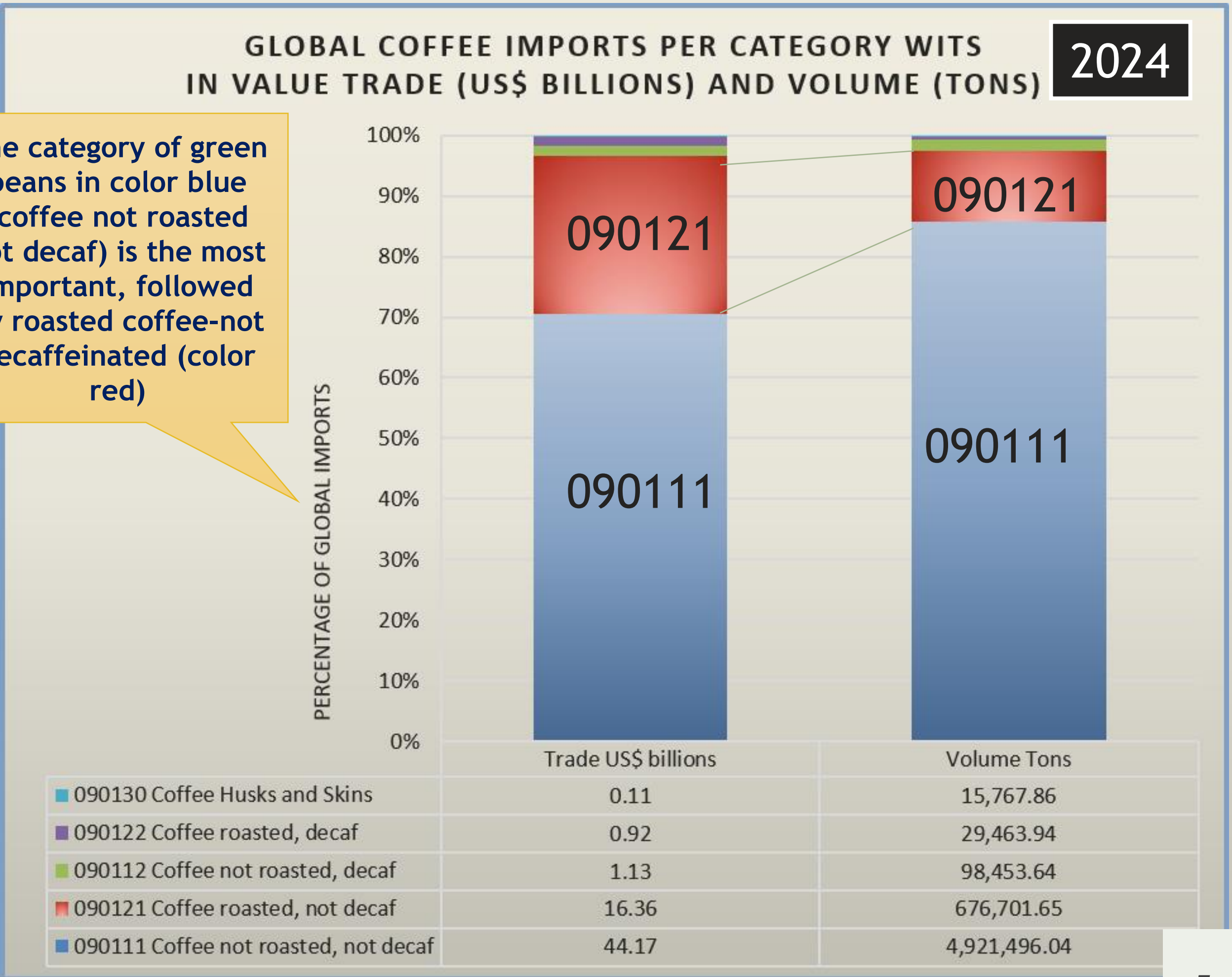
The selection of customer segments is based by the customer preferences and the proven demand of the final product.
The small farmers of the tropical belt nations are required to rethink in the products,
A shift in the imports will happen, and inevitably, the midstream players will need to reconsider their procurement and respective value chains.

Coffee Global Imports 2024

Eighteen countries imported the 80% of coffee not roasted, not decaf (green beans) during 2024.
These nations are the European Union, United States, Germany, Italy, Japan, Spain, Switzerland, France, Canada, China, Korea, Rep., Netherlands, United Kingdom, Belgium, Poland, Australia, Sweden, and the Russian Federation.
The green coffee beans (category coffee not roasted-not decaf) represent 70% in trade (USD), and 86% in weight (kg). The categories used in imports are related to the variety (Robusta or Arabica), and if coffee is roasted, not roasted, decaf or not decaf.
The price per kg is CIF.

Code WITS	Category	Trade US$ billions	Volume Tons
090111	Coffee not roasted, not decaf	44.17	4,921,496.04
090121	Coffee roasted, not decaf	16.36	676,701.65
090112	Coffee not roasted, decaf	1.13	98,453.64
090122	Coffee roasted, decaf	0.92	29,463.94
090130	Coffee Husks and Skins	0.11	15,767.86
090140	Coffee substitutes containing coffee	Not relevant to consider	
	Total with +/- 8% error margin	$ 62.69	$ 5,741,883.14

The category of green beans in color blue (coffee not roasted not decaf) is the most important, followed by roasted coffee-not decaffeinated (color red)



All the references cited and used for our inferences are shown in slide 35-36

Customer Segments

What is imported by the midstream & downstream?

Green beans

2024

The selection of customer segments is based by the customer preferences and the proven demand of the final product.
The small farmers of the tropical belt nations are required to rethink in the products according to other type of clients.
The importance of this chapter is to understand the relative worth or substance of different sub-products made from the beans, and its geographies to identify new potential customer segments for the small farmers in its transition to obtain a PDO (protected designation of origin).
Small farmers won´t sell green beans with a geographic indication, but a range of PDO coffee with quality to the world.

Coffee Global Imports 2024

- Let´s acknowledge that coffee production is not the same than coffee global exports. There is always an inventory (stocks or reserves kept in warehouses at different points of the global value chain at the three levels: upstream, midstream and downstream).
- Additionally, if we want to use the total "perfect" ramification of data when analyzing international trade, we should separate and clean all the data and include the goods after inward processing from goods for outward processing.
- However, we have tried to simplify, using only the exports and imports data, for an approximation.
- The purpose of this slide is to understand why are we doing all this analysis about the different categories of coffee and its relative importance when comparing in between, at a category-product level, and at a geographic level.
- The following slides are a learning experience for our students. We started with the most recent year 2024, using the World-Bank and United Nations (most reliable databases) for trade, but we encountered huge missing data from the top exporters. So, we were compelled to re-do the exports again using the year 2023.
  This episode is the perfect example of why we do not use AI in our analysis.
- The review of the data should be made by humans.

Table 3: World Supply/Demand Balance Million of bags 60Kg each

Coffee Year	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24*	% change
PRODUCTION	**169.8**	**168.4**	**170.8**	**168.0**	**168.2**	**178.0**	**5.8%**
Arabica	99.5	96.4	100.6	92.3	94.0	102.2	**8.8%**
Robusta	70.3	72.0	70.3	75.7	74.2	75.8	**2.1%**
Africa	18.5	18.5	19.2	19.3	17.9	20.1	**12.1%**
Caribbean, Central America & Mexico	21.3	19.2	19.7	18.9	19.2	18.7	**-2.5%**
South America	81.9	81.1	83.9	77.6	81.3	89.3	**9.8%**
Asia & Oceania	48.1	49.6	48.0	52.2	49.8	49.9	**0.3%**
CONSUMPTION	**171.2**	**168.6**	**169.9**	**176.6**	**173.1**	**177.0**	**2.2%**
Exporting Countries	52.5	52.2	53.1	54.4	55.1	56.5	**2.6%**
Importing Countries (Coffee Year)	118.6	116.4	116.8	122.2	118.1	120.5	**2.1%**
Africa	11.9	12.1	13.0	12.9	12.2	12.5	**2.6%**
Asia & Oceania	39.9	40.1	42.2	44.2	44.5	45.7	**2.7%**
Caribbean, Central America & Mexico	5.8	5.8	5.9	6.0	6.0	6.1	**2.3%**
North America	31.8	30.6	30.2	31.3	29.8	30.9	**3.8%**
South America	26.3	26.0	26.4	27.0	27.5	28.0	**1.6%**
Europe	55.5	54.0	52.2	55.2	53.1	53.7	**1.1%**
BALANCE	**-1.3**	**-0.2**	**0.9**	**-8.6**	**-4.9**	**1.0**	

*preliminary estimates

Data from Coffee Market Report CMR-2023
ICO (International Coffee Association)

Eleonora Escalante Analysis estimated 176.5 million bags of 60 kg as the exports of the year that closes in December 2024. The International Coffee Association (ICO) estimated a production of 178 million bags.
Let´s remember production is not the same as exports, because there is always a stock kept in warehouses at different points of the supply global chain.

Customer Segments

What is imported by the midstream & downstream?

Green beans

All the references cited and used for our inferences are shown in slide 35-36

The most important lesson about imports of green beans of coffee from the Tropical belt nations:

1. The European Union as a unified market and the individual nations import in total between 65% to 70% of all the global coffee.
2. The rest is imported by Asian nations and Oceania.
3. The USA imported only 14% of the green beans.

Small farmers must acknowledge that premium markets for their coffee beans must be adapted to the European Union demand. Specific niches in Asia should be considered.

Coffee Global Imports 2024

We continued with imports 2024. Which are the countries importing 80% of the global production of green beans in 2024 (category: Not roasted, not decaf)?

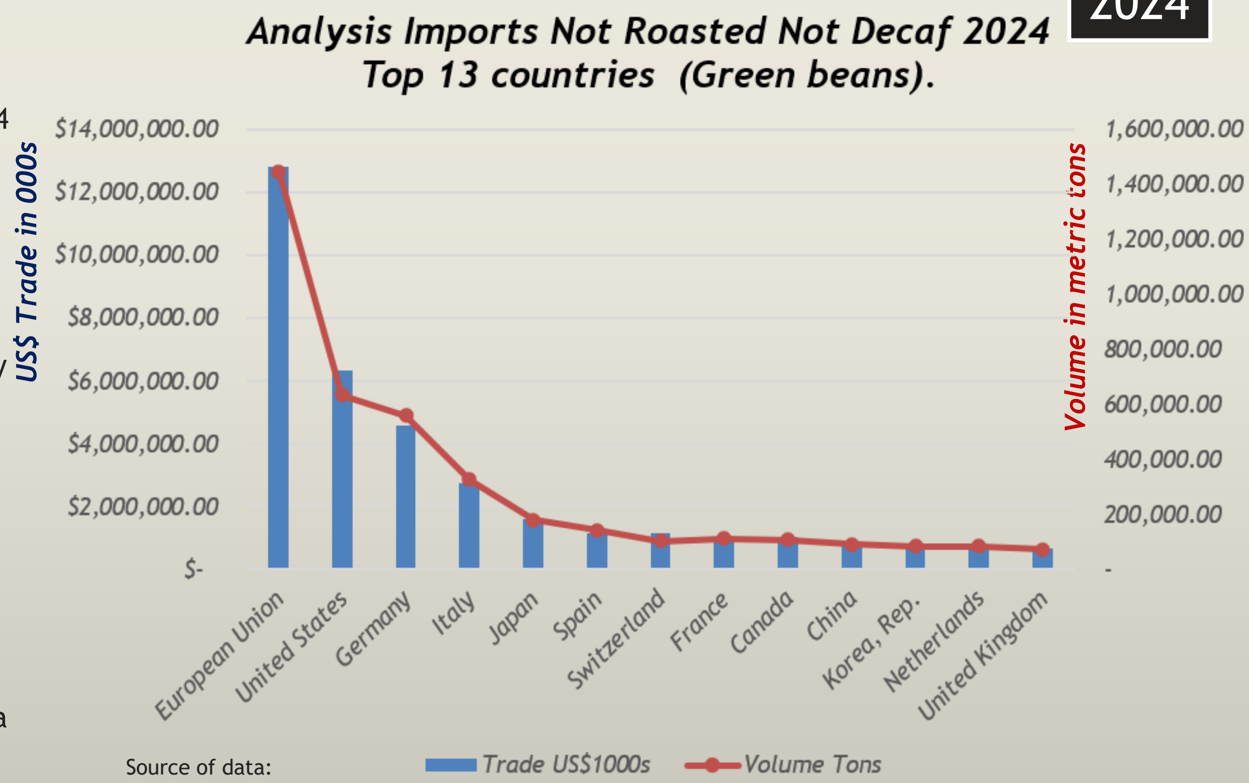
There are 13 nation-states. The European Union is positioned as the leading importer of green beans (30%). The EU block has the legal capacity to import as a unified regional market. And as a regional group, the EU block evaluates, negotiates, and prices its annual imports trade of coffee. Guess from where are mainly the green beans arriving to EU ports? Mainly from Brazil, a nation that sells at the lowest price. See the next slide of coffee exports.

Another discovery: If we sum the trade import values of the EU, Germany, Italy, Spain, Switzerland, France, the Netherlands and the UK, we reach 60% of the total imports. As a whole region, Europe is interested in green beans, to then roast them locally for each nation consumption, and re-export it to intl. markets.

Europe is the largest and most relevant coffee market. All together as a block plus individual nations, they account for a robust power of negotiation, and the trend in the youth is to look for more sophisticated blends, specialized premium mixes in the future.

Now, most of the green bean's robusta and Arabica varieties are flooding the EU marketplace.

2024



Source of data: https://wits.worldbank.org/trade/comtrade/en/country/ALL/year/2024/tradeflow/Imports/partner/WLD/product/090111.

Eleonora Escalante Strategy Research division has reviewed and extrapolated the missing data from other trusted sources.

Cacao and Coffee 101.
Success Strategies for Small Farm Holders

Green beans

Customer Segments

What is imported by the midstream & downstream?

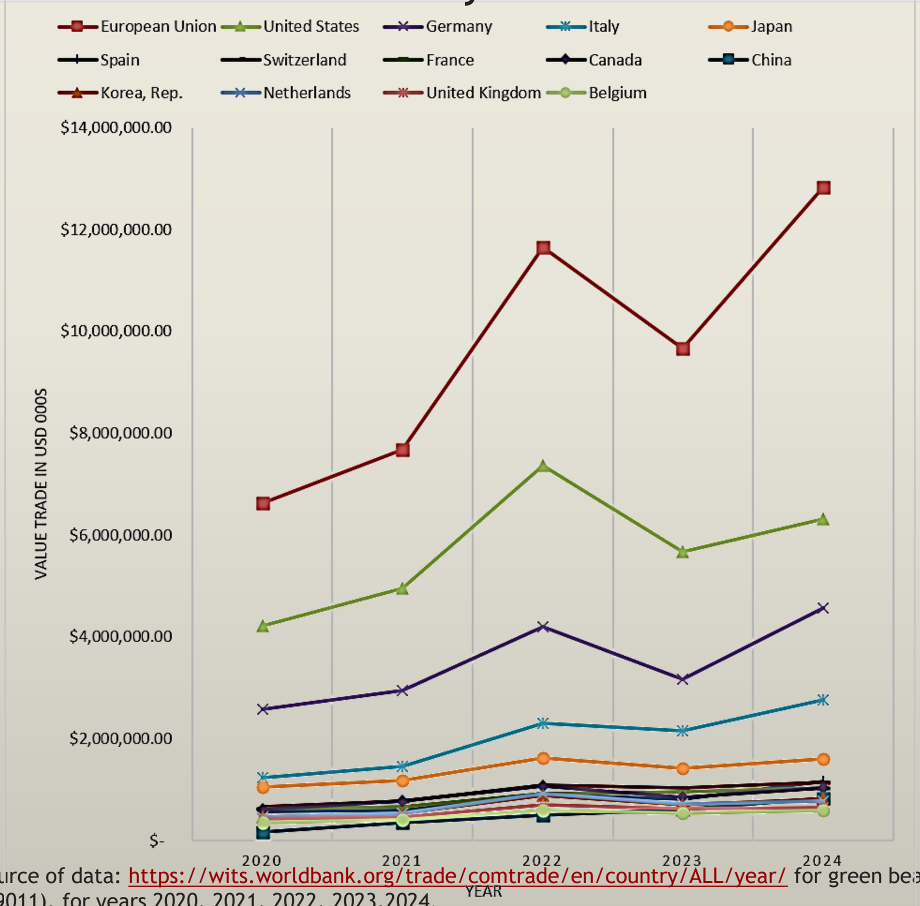
Europe (as an EU block and individual nations) are not interested to import roasted or decaf coffee.
They are experts in blending and roasting the beans, to control the quality of flavors and taste.
In consequence, the PDO (which is the equivalent of the AOC in France) should be considered.
If Europe is the main client of green beans, to build a future with a PDO system should disrupt the Europeans with quality, or open new clients in Asia.

Coffee Global Imports Horizontal Growth last 5 years

- The graph at your right shows how the demand of coffee green beans has increased, despite the pandemic year and the Ukraine-Russia geopolitical issues. In the year 2022, the imports were stabilized to levels before the COVID 19 disaster. Coffee downstream consumption is affordable for any European individual, and Midstream roasters will continue importing green beans because tariff duties are not levied on green coffee.
- In consequence, small farmers improvement of the quality of the bean value could happen only at a “protected designation of origin”, because Europe won´t import roasted beans because of trade duties.
- European Union is the premier client of green beans. We can observe in the graphic, how Europe (as a unity market block) dominates the demand in comparison to other nations. The export demand for green beans continues to grow year over year (between 15% to 30%).
- The taste profile relies in the midstream roasters located mainly in Europe which make this market extremely competitive.
- Germany is the largest coffee trade hub, being Hamburg its main port of entry. European companies import all the beans directly from the tropical belt nations (around 95%). About 16% of green beans are re-exported to other European nations. The Neumann Kaffee Gruppe (NKG) is operating from there.
- Belgium (the EU block hub) re-exports green coffee mainly to the Netherlands, France, Spain; Germany and Poland.

Trade Imports coffee not roasted not decaf Horizontal Analysis 2020-2024

US$ Trade in 000s



Source of data: https://wits.worldbank.org/trade/comtrade/en/country/ALL/year/ for green beans (09011), for years 2020, 2021, 2022, 2023,2024.
Eleonora Escalante Strategy Research division has reviewed and extrapolated any missing data from other well trusted sources. Our margin of error is of 7 % standard deviation. This margin of error is generally acceptable for exploratory research, pilot studies and general picture description of a situation.

All the references cited and used for our inferences are shown in slide 35-36

Customer Segments

What is imported by the midstream & downstream?

Note: The Coffee Global Exports 2024 database from World Bank WITS and UNComtrade is incomplete. It doesn´t include all the main relevant nations involved in trade. This is why we explored the year 2023.

The main category of coffee exported are also the green beans (not roasted, not decaf). 85% of the 2024 global exports volume in tons is exported in that format. Most of the coffee roasted not decaffeinated is re-exported.

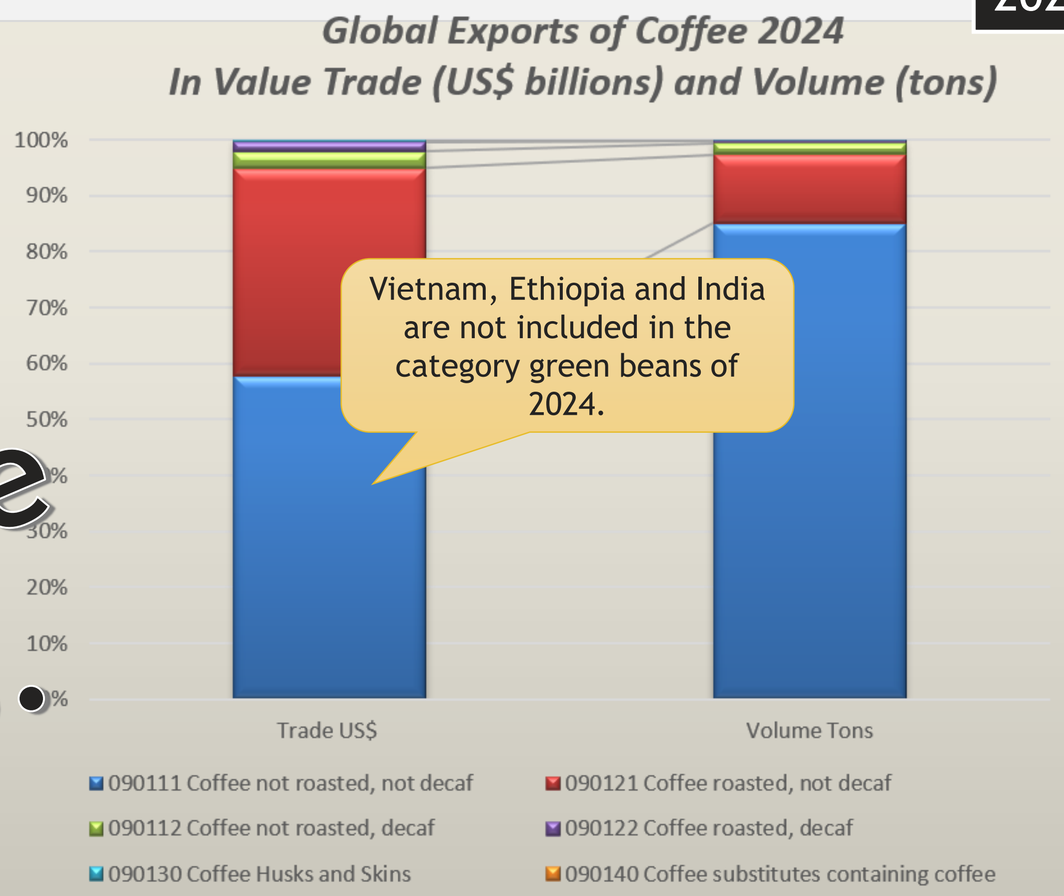
Coffee Global Export 2024

Exports 2024 data is incomplete, let´s explore year 2023.

The graph at your right is from 2024. You can perceive what is the situation with the producers (the upstream exporters) and the re-exporters. Around [illegible] of the export trade represent more than 45% of the weight of green beans.
The total exports of [illegible] were 47.17 billion USD, representing 6,224,0[illegible] tons.
The main supplier of green beans of coffee is Brazil (42% in trade, 68% in weight), followed by Colombia and Indonesia.
Brazil sells its beans [illegible] cheap price. Let´s see next slide, please.

	Coffee EXPORTS GLOBAL		
Code WITS	Category	Trade US$ [illegible]	Volume Tons
090111	Coffee not roasted, not decaf	$ [illegible].28	5,292,8[illegible]
090121	Coffee roasted, not decaf	$ 17.46	[illegible]
090112	Coffee not roasted, decaf	$ 1.40	[illegible]6.58
090122	Coffee roasted, decaf	$ [illegible].88	[illegible]28,816.66
090130	Coffee Husks and Skins	$ [illegible].14	11,210.58
090140	Coffee substitutes containing coffee	[illegible]	
	TOTALS	$ 47.17	6,224,051.05

2024



Source of data: https://wits.worldbank.org/trade/comtrade/en/country/ALL/year/ for exports green beans (09011), Eleonora Escalante Strategy Research division has reviewed and extrapolated any missing data from other well trusted sources. Our margin of error is of 7 % standard deviation. This margin of error is generally acceptable for exploratory research, pilot studies and general picture description of a situation.

All the references cited and used for our inferences are shown in slide 35-36

57.08% 78.62%
37.69% 17.32%

Customer Segments

What is imported by the midstream & downstream?

2023

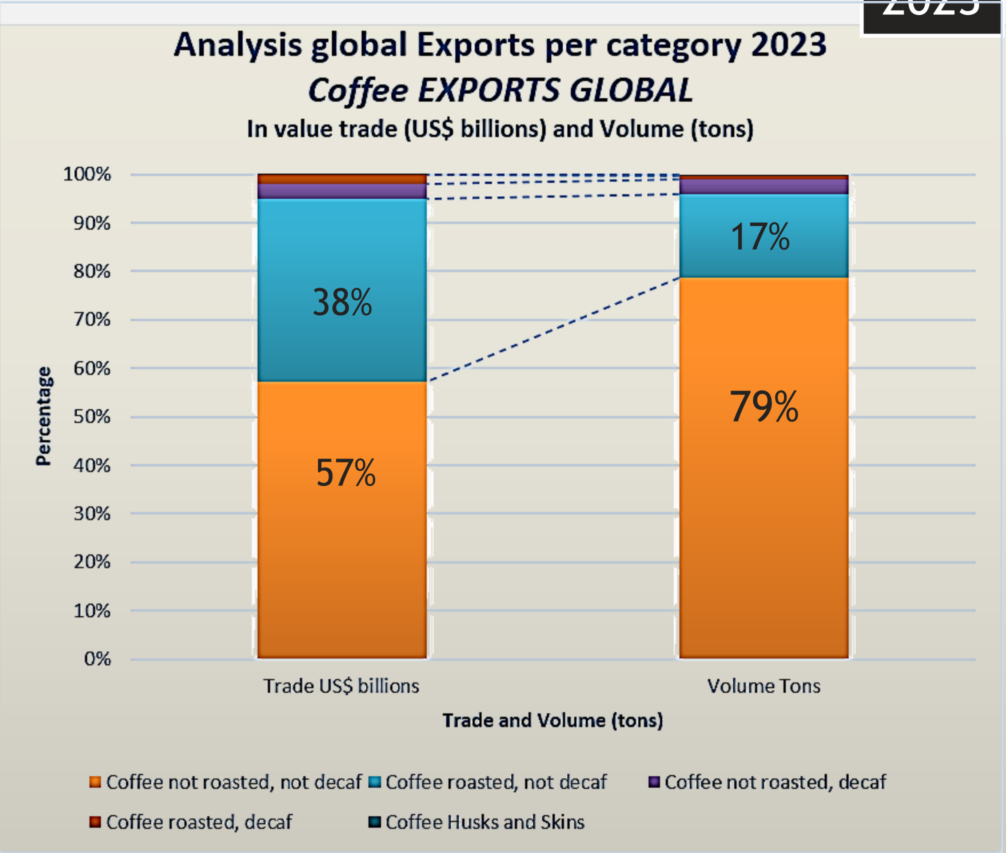
All the references cited and used for our inferences are shown in slide 35-36

The main category of coffee exported are also the green beans (not roasted, not decaf). 79% of the 2023 global exports (in weight tons) is exported mainly to Europe. Germany, USA and the EU nations re-export some of that coffee to other nations.

Coffee Global Exports 2023

The graph at your right is from 2023. We believe this is a year with a better overview for our class of today.
The year 2023 shows that in terms of economic value USD 57% of the coffee exports corresponds to green beans (coffee not roasted, not decaf), while in weight it represents 79%. The second important category is the coffee roasted not decaffeinated, with 38% in economic trade and 17.3% in weight (kg). The total of exports was $44 billion USD, for a total of 4.3 million tons (143 million bags of 60 kg).

Year 2023	*Coffee EXPORTS GLOBAL*		
Code WITS	***Category***	***Trade US$ billions***	***Volume Tons***
090111	Coffee not roasted, not decaf	$ 25.17	3,377,936.95
090121	Coffee roasted, not decaf	$ 16.62	744,125.84
090112	Coffee not roasted, decaf	$ 1.33	131,781.96
090122	Coffee roasted, decaf	$ 0.86	28,581.54
090130	Coffee Husks and Skins	$ 0.00	14,176.55
090140	Coffee substitutes containing coffee		
	TOTALS	**$ 43.98**	**4,296,602.85**



Source of data: https://wits.worldbank.org/trade/comtrade/en/country/ALL/year/ for exports green beans (09011), Eleonora Escalante Strategy Research division has reviewed and extrapolated any missing data from other well trusted sources. Our margin of error is of 7 % standard deviation. This margin of error is generally acceptable for exploratory research, pilot studies and general picture description of a situation.

Note: The Coffee Global Exports 2024 database from World Bank WITS and UNComtrade is incomplete. It doesn´t include all the main relevant nations involved in trade. This is why we explored the year 2023.

Green beans

Customer Segments

What is imported by the midstream & downstrea[illegible]?

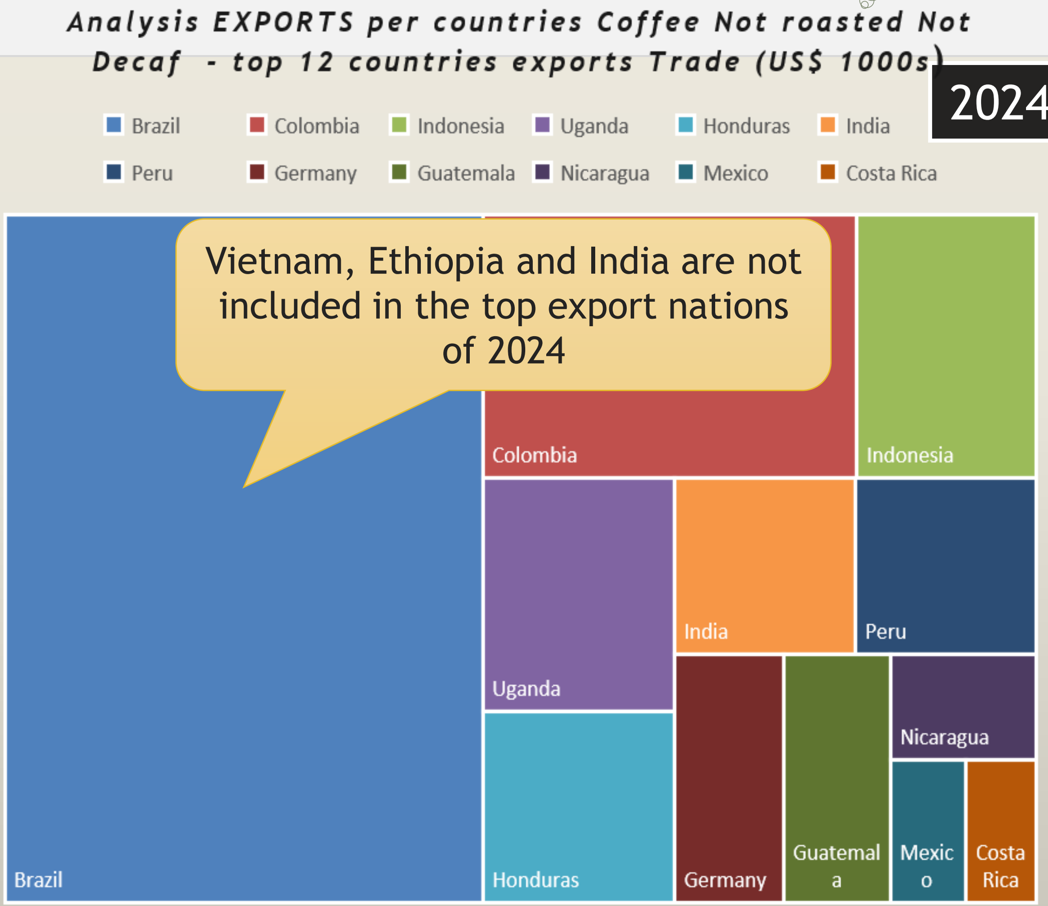
Exports 2024 data is incomplete, let´s explore year 2023.

90% of the exports of green beans is in the shoulders of 12 countries: Brazil, Colombia, Indonesia, Uganda, Honduras, India, Peru, Germany (Re-exports), Guatemala, Nicaragua, México, and Costa Rica.

Coffee Glob[illegible] [illegible]rt[illegible] 2024

The most interesti[illegible] t[illegible]g ab[illegible]t coffee exports is to see the Marimekko g[illegible] [illegible] your [illegible]ght.
Brazi[illegible] [illegible]ts [illegible]2% of the total expor[illegible] [illegible]t 68% in terms of w[illegible]t.
Th[illegible] total exports of g[illegible] [illegible]s was 27.3 billion USD ([illegible],308,652 tons).
Do you want to k[illegible]ow t[illegible] [illegible]azilian CIF pri[illegible] pe[illegible] [illegible]1.5[illegible]/k[illegible],
while the averag[illegible] [illegible]e rest of the top 12 [illegible] is [illegible].70/kg.

090111	Analysis EXPORTS per countries Coffee Not roasted Not Decaf - Top [illegible] co[illegible]t[illegible]s				
	Country	Trade (US$ 1000s)	Qu[illegible] t[illegible]	[illegible] Trade	% Volume
1	Brazil	$ 11,337,471.[illegible]	[illegible]60[illegible]70.00	42%	[illegible]%
2	Colombia	$ 3,39[illegible]408.[illegible]	[illegible]23,981.00	12%	[illegible]
3	Indonesia	$ 1,[illegible]24	156,373.50	[illegible]%	3%
4	Uganda	[illegible] 1,5[illegible],969.76	192,956.[illegible]	[illegible]	4%
5	Honduras	[illegible] 1,266,341.33	[illegible],705.[illegible]	5%	3%
6	India	$ 1,105,[illegible]54.32	[illegible]12.50	4%	[illegible]%
7	Peru	$ 1,100,[illegible].27	[illegible],138.50	[illegible]	[illegible]
8	Germany	[illegible]	100,000.50	3%	2[illegible]
9	Guatemala	$ [illegible]179.11	94,746.00	3%	2%
10	Nicaragua	$ 524,478.33	60[illegible]	2%	1%
11	Mexico	$ 376,926.26	[illegible]	1%	1%
12	Costa Rica	$ 344,7[illegible]31	[illegible],825.00	1%	1%
	Subtotal 90%	$ 24,464,219.[illegible]	4,996,814.70	90%	94.4%
	Total	$ 27,284,628.47	5,308,651.29		
		90%	94%		



Source of data: https://wits.worldbank.org/trade/comtrade/en/country/ALL/year/ for exports green beans (09011), Eleonora Escalante Strategy Research division has reviewed and extrapolated any missing data from other well trusted sources. Our margin of error is of 7 % standard deviation. This margin of error is generally acceptable for exploratory research, pilot studies and general picture description of a situation.

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Cacao and Coffee 101.
Success Strategies for Small Farm Holders

Customer Segments

What is imported by the midstream & downstream?

All the references cited and used for our inferences are shown in slide 35-36

90% of the exports of green beans is in the shoulders of 15 producing countries, with exception of Germany and USA (re-exporters): Brazil, Vietnam Colombia, Indonesia, Uganda, Honduras, Ethiopia, India, Peru, Germany (Re-exports), India, Guatemala, Nicaragua, México, Costa Rica, and USA (re-exports).

Coffee Global Exports 2023

Let´s correct the last slide of the incomplete data from 2024 by analyzing the year 2023. We are using the WITs database (World Bank) and the UN Comtrade system. The 90% of the exports is traded by 15 nations from a total of 132. See the difference, once we include Vietnam, Ethiopia and India.
The CIF Brazilian price for 2023 (average) was $3.73/kg. The average CIF price of the top 15 exporter countries was CIF $4.23/kg.

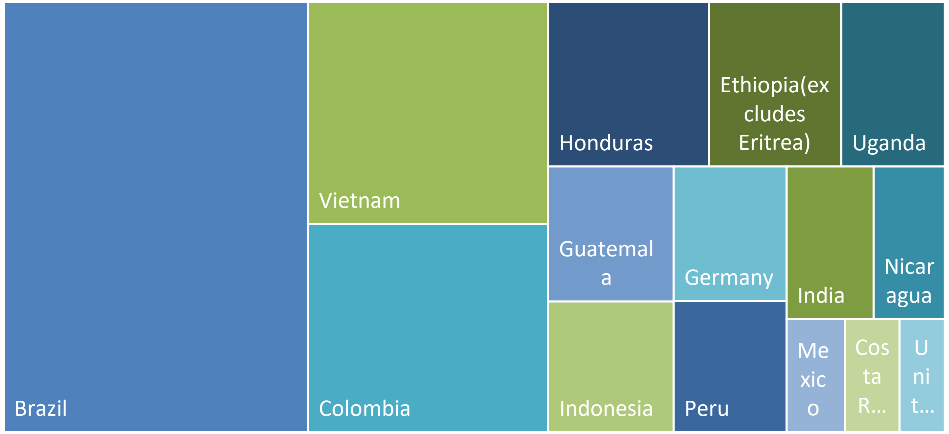
Green beans

2023

Analysis EXPORTS per countries Coffee Not roasted Not Decaf - Top 15 countries					Year 2023
Country	***Trade (US$ 1000s)***		***Quantity tonnes***	***% Trade***	***% Volume***
Brazil	$	7,315,353.94	1,058,313.60	29%	31%
Vietnam	$	2,977,954.67	517,590.00	12%	15%
Colombia	$	2,791,949.52	287,902.00	11%	9%
Honduras	$	1,477,445.64	170,296.50	6%	5%
Ethiopia(excludes Eritrea)	$	1,218,808.32	117,440.50	5%	3%
Uganda	$	950,623.47	184,360.50	4%	5%
Guatemala	$	946,277.67	91,041.00	4%	3%
Indonesia	$	915,793.88	138,121.00	4%	4%
Germany	$	848,343.60	99,622.00	3%	3%
Peru	$	827,514.03	102,273.50	3%	3%
India	$	741,032.68	115,937.00	3%	3%
Nicaragua	$	607,053.75	69,755.50	2%	2%
Mexico	$	366,343.73	36,575.75	1%	1%
Costa Rica	$	346,963.21	30,131.65	1%	1%
United States	$	283,715.29	28,130.10	1%	1%
Subtotal top 15 90%	**$**	**22,615,173.40**	**$ 3,047,490.60**	**90%**	**90%**

The importance of good reliable data for strategic decision making helps to comprehend the industry and its premises of trade. Even with the 2023 input of data from the World Bank and United Nations, we estimate a feasible margin of error of 7%.

Analysis EXPORTS per countries Coffee Not roasted Not Decaf - Top 15 countries (2023)



Source of data: https://wits.worldbank.org/trade/comtrade/en/country/ALL/year/ for exports green beans (09011), Eleonora Escalante Strategy Research division has reviewed and extrapolated any missing data from other well trusted sources. Our margin of error is of 7 % standard deviation. This margin of error is generally acceptable for exploratory research, pilot studies and general picture description of a situation.

COCOA INTERNATIONAL TRADE

Analysis years 2023-2024

9/7/2026

Cacao and Coffee 101.
Success Strategies for Small Farm Holders

Note: The Cocoa Global Imports 2024 database from World Bank WITS and UNComtrade is complete and include all the main relevant nations involved in trade.

Customer Segments

What is imported by the midstream & downstream?

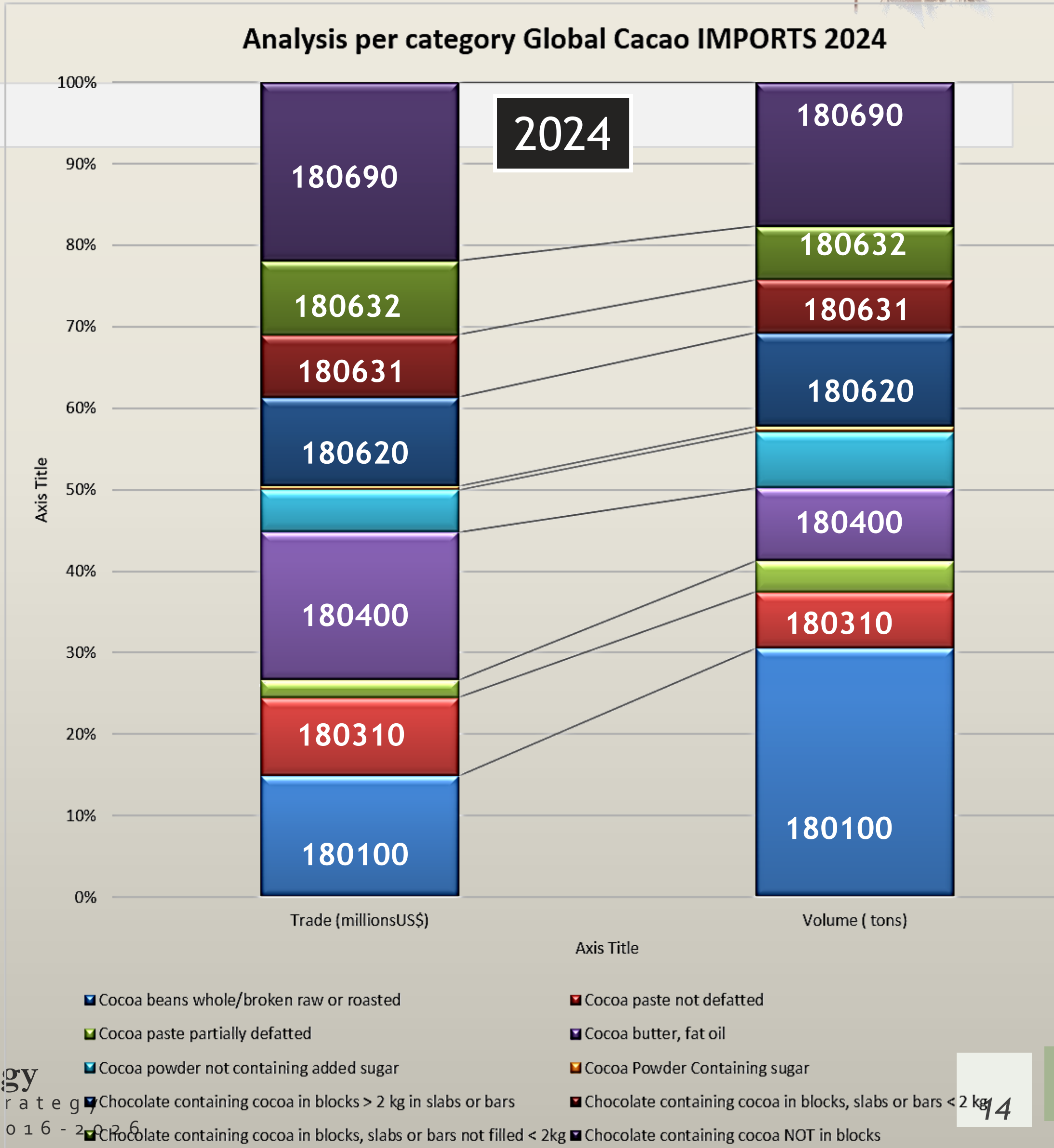
All the references cited and used for our inferences are shown in slide 35-36

Right now, the value of the cacao beans imported from the tropical belt nations is the foundation for more than 73 billion dollars in aggregated revenues value trade.

Cacao Global Imports 2024

80% of imports of the cacao beans whole/broken raw or roasted is done by the European Union, the Netherlands, USA, Malaysia, Germany, Indonesia, France, Turkey and the UK.
The table below shows the categories of imports of cacao: cacao beans (15%), cacao paste (12%), cocoa butter (18%), Chocolate containing cocoa in blocks, slabs and bars > 2kg (11%), Chocolate containing cocoa not in blocks (22%). Look at the stacked figures at your right). The price per kg is CIF.

Analysis per category Cacao IMPORTS 2024			
Code	*Name Product*	*Trade (millionsUS$)*	*Volume (tons)*
180100	Cocoa beans whole/broken raw or roasted	$ 12,929.37	2,393,088.88
180310	Cocoa paste not defatted	$ 8,297.82	541,230.85
180320	Cocoa paste partially defatted	$ 1,866.71	298,140.42
180400	Cocoa butter, fat oil	$ 15,750.31	700,558.41
180500	Cocoa powder not containing added sugar	$ 4,503.14	541,645.66
180610	Cocoa Powder Containing sugar	$ 377.58	50,890.38
180620	Chocolate containing cocoa in blocks > 2 kg in slabs or bars	$ 9,452.04	901,072.36
180631	Chocolate containing cocoa in blocks, slabs or bars < 2 kg	$ 6,667.19	512,267.99
180632	Chocolate containing cocoa in blocks, slabs or bars not filled <	$ 7,863.27	510,093.84
180690	Chocolate containing cocoa NOT in blocks	$ 18,984.54	1,385,481.80
	Total Imports 2024	**$ 86,691.96**	**7,834,470.57**



2024

Customer Segments

What is imported by the midstream & downstream?

All the references cited and used for our inferences are shown in slide 35-36

When reviewing the year 2023, we found different categories in order relevance (with higher value in terms of imports):

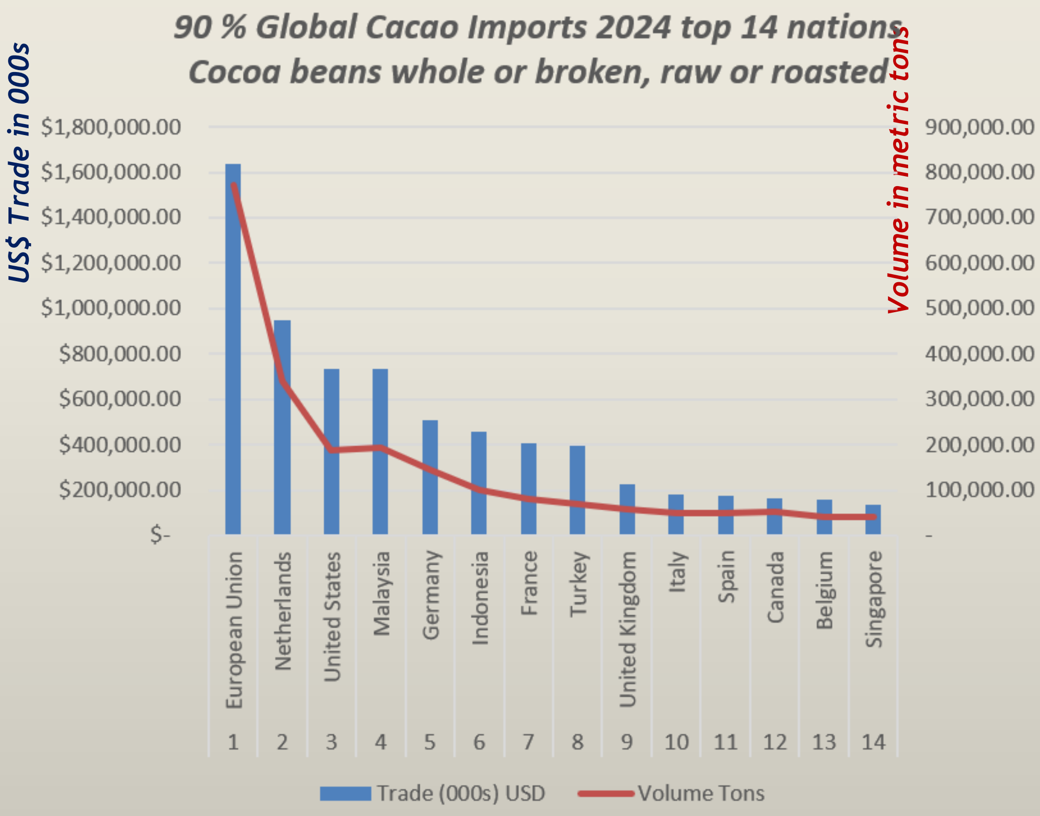
1. Cacao beans (whole or broken, raw or roasted).
2. Cocoa butter (solid fat or oil)
3. Chocolate Containing cocoa not sold in blocks (see the categories next slide)

Cacao Global Imports 2024

For the category of Cacao Beans only: Again, if you observe the graph at your right:
The EU, the Netherlands, the US, Malaysia, Germany and the rest of nations below import 90% of cocoa beans.

Top 14 nations importing cacao beans year 2024

2024 Cacao Imports 180100 Cocoa bean		Trade (000s) USD	Volume Tons	% trade	% volume
1	European Union	$ 1,638,115.56	772,045.00	32.75%	32.26%
2	Netherlands	$ 945,692.85	340,653.50	14.03%	14.23%
3	United States	$ 736,129.12	188,537.00	7.94%	7.88%
4	Malaysia	$ 731,440.83	192,341.00	7.52%	8.04%
5	Germany	$ 505,141.22	146,025.50	6.09%	6.10%
6	Indonesia	$ 455,247.59	99,419.00	3.91%	4.15%
7	France	$ 407,667.51	79,741.50	3.53%	3.33%
8	Turkey	$ 393,413.18	68,735.00	2.64%	2.87%
9	United Kingdom	$ 223,400.81	58,231.00	2.42%	2.43%
10	Italy	$ 179,188.81	49,759.45	2.34%	2.08%
11	Spain	$ 173,498.50	48,765.80	2.03%	2.04%
12	Canada	$ 162,966.78	51,886.00	2.00%	2.17%
13	Belgium	$ 158,819.15	40,621.40	1.80%	1.70%
14	Singapore	$ 136,412.89	42,232.16	1.76%	1.76%
	Total 90 % of the total impo	$ 6,847,134.80	$ 2,178,993.31	90.76%	91.05%



Average price per kg of cacao beans imports is CIF $2.70/kg

Customer Segments

What is imported by the midstream & downstream?

All the references cited and used for our inferences are shown in slide 35-36

The downstream producers and retailers represent a robust category using the chocolate containing cocoa not in blocks. Let´s understand what they do in terms of trade and volume (weight).

Cacao Global Imports 2024

2024

What are the products with chocolate that contain cocoa not in blocks?

180690 Chocolate containing cocoa not in blocks

- 9010 Chocolate and Chocolate Products (bars and candies)
- 9011 Chocolates including pralines whether or not filled, containing alcohol, or not, and others.
- 9031 Chocolates Others
- 9040 Cocoa Spreads
- 9050 Sugar confectionery and substitutes containing cocoa: halva and others.
- 9060 Spreads containing Cocoa (in immediate packings not exceding 1 kg and others)
- 9070 Preparations containing cocoa for making beverages (in immediate packings not exceding 1
- 9090 Other food preparations containing cocoa (malt-based foods, protein powders, etc)

Analysis per category Cacao IMPORTS 2024

Code	*Name Product*	*Trade (000sUS$)*	*Trade (billion USD)*	*Volume (Kg)*	*Volume Tons*	*% Trade*	*% weight*	*Price per kg average*
180100	Cocoa beans whole/broken raw or roasted	$ 12,929,365.70	$ 12.93	4,786,177,752.58	2,393,088.88	15%	31%	$ 2.70
180310	Cocoa paste not defatted	$ 8,297,824.84	$ 8.30	1,082,461,698.16	541,230.85	10%	7%	$ 7.67
180320	Cocoa paste partially defatted	$ 1,866,710.60	$ 1.87	596,280,842.22	298,140.42	2%	4%	$ 3.13
180400	Cocoa butter, fat oil	$ 15,750,307.17	$ 15.75	1,401,116,815.13	700,558.41	18%	9%	$ 11.24
180500	Cocoa powder not containing added sugar	$ 4,503,143.47	$ 4.50	1,083,291,321.76	541,645.66	5%	7%	$ 4.16
180610	Cocoa Powder Containing sugar	$ 377,578.38	$ 0.38	101,780,758.24	50,890.38	0%	1%	$ 3.71
180620	Chocolate containing cocoa in blocks > 2 kg in slabs or bars	$ 9,452,041.40	$ 9.45	1,802,144,714.02	901,072.36	11%	12%	$ 5.24
180631	Chocolate containing cocoa in blocks, slabs or bars < 2 kg	$ 6,667,188.82	$ 6.67	1,024,535,976.62	512,267.99	8%	7%	$ 6.51
180632	Chocolate containing cocoa in blocks, slabs or bars not filled < 2kg	$ 7,863,267.03	$ 7.86	1,020,187,672.20	510,093.84	9%	7%	$ 7.71
180690	Chocolate containing cocoa NOT in blocks	$ 18,984,535.44	$ 18.98	2,770,963,595.85	1,385,481.80	22%	18%	$ 6.85
	TOTAL IMPORTS 2024	***$ 86,691,962.85***	***$ 86.69***	***15,668,941,146.78***	***7,834,470.57***	***1***	***1***	

Cacao and Coffee 101.
Success Strategies for Small Farm Holders

2024

Customer Segments

What is imported by the midstream & downstream?

All the references cited and used for our inferences are shown in slide 35-36

The Exports of cacao and products manufactured with cocoa or chocolate subproducts is 93 billion USD (2024)

Exports 2024 data is incomplete, let´s explore year 2023.

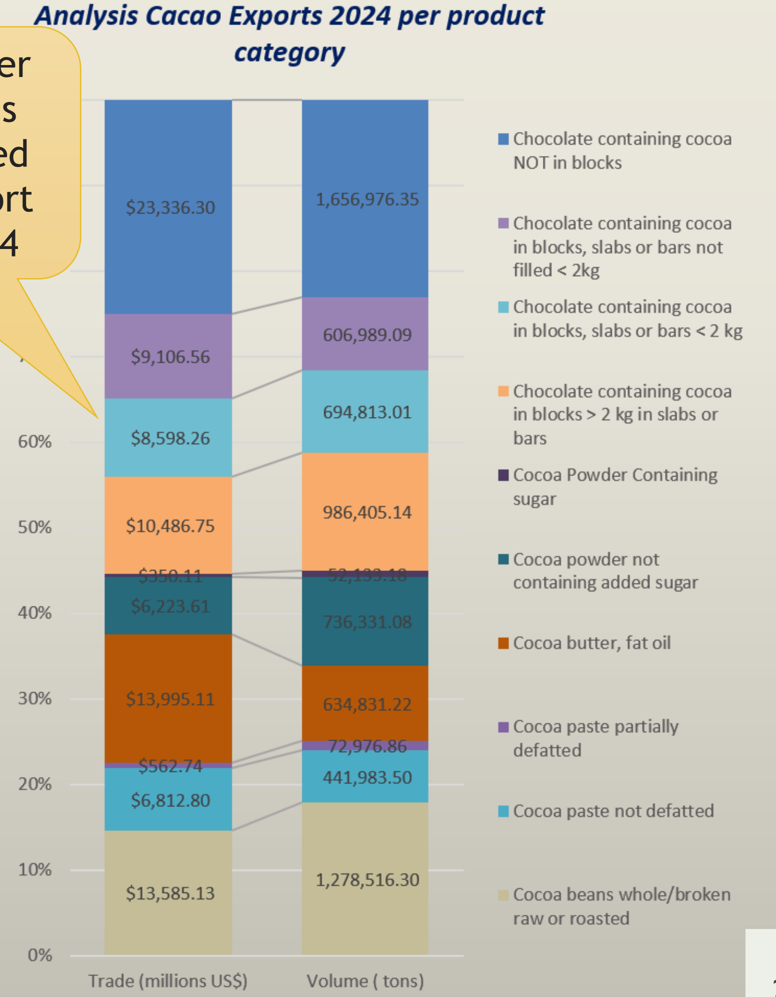
Cacao Global Exports 2024

Again, if you [illegible] the graph at your right:
By category of [illegible] exports, we can observe that the [illegible] category [illegible] the Chocolate containing cocoa not sold in bloc[illegible] [illegible] are the products manufactured by the downstream [illegible] which can buy the [illegible] beans directly with the farmers, or the cocoa paste [illegible] their portfolio offer.

Ghana and other African nations are not included in the top export nations of 2024

Note: The Cacao Global Exports 2024 database from World Bank WITS and UNComtrade is incomplete and doesn´t include all the main relevant nations involved in trade.

Analysis per category Cacao EXPORTS 2024			
Code	*Name Product*	*Trade (millions US$)*	*Volume (tons)*
180100	Cocoa beans whole/broken raw or roasted	$ [illegible]	[illegible]
180310	Cocoa paste not defatted	$ [illegible]	441,983.50
180320	Cocoa paste partially defatted	$ 562.74	72,976.86
180400	Cocoa butter, fat oil	13,995.11	634,831.22
180500	Cocoa powder not containing added sugar	$ [illegible]	[illegible]
180610	Cocoa Powder Containing sugar	$ [illegible]	52,133.18
180620	Chocolate containing cocoa in blocks > 2 kg in slabs or bars	$ [illegible]	986,405.14
180631	Chocolate containing cocoa in blocks, slabs or bars < 2 kg	$ 8,598.26	694,813.01
180632	Chocolate containing cocoa in blocks, slabs or bars not filled < 2kg	$ 9,106.56	606,989.09
180690	Chocolate containing cocoa NOT in blocks	$ 23,336.30	1,656,976.35
	Total EXPORTS 2024	**$ 93,057.39**	**7,161,955.74**



Eleonora Escalante Strategy
State of the Art Corporate Strategy

Cacao and Coffee 101.
Success Strategies for Small Farm Holders

Customer Segments

What is imported by the midstream & downstream?

We decided to cross-check the production of cocoa beans (and its cocoa equivalent) with the exports of 2023.

The Exports of cacao and products manufactured with cocoa or chocolate subproducts is 69.8 billion USD (2023)

Cocoa Cake is the compressed, fat-depleted residue of roasted cocoa beans. It is the compacted hard, dry, compressed mass that then is milled and transformed into cocoa powder.

Cacao Global Exports 2023

1. The exports of cacao beans and the rest of cocoa products are not that far from the level of annual production. There is a difference but not that great
2. If there is a difference between production of beans and exports three explanations could be: (1) there is a huge amount of smuggling (illegal trade that is not registered by customs), (2) some of the production of beans and other cacao products is kept in warehouses and it is not exported to foreign nations, (3) the production of cocoa beans by ICCO includes not just the beans but all the cacao equivalents of all the subproducts.
3. We verified the third reason: The term cocoa bean equivalents refers to all exported cocoa products (i.e., cocoa butter, cocoa powder, etc.) converted into cocoa beans equivalents using the conversion factors set by the ICCO. The conversion factors used in determining the bean equivalent of cocoa products: cocoa butter 1.33, cocoa paste/liquor 1.25, cocoa powder and cocoa cake 1.18, chocolate and chocolate products 0.40, chocolate products identified as containing only half the normal quantity of cocoa 0.20.

2023			Factors of conversion	Cacao Equivalent
Category of cocoa Product	***Trade (billion USD)***	***Volume Tons***		**Tons**
Cocoa beans whole/broken raw or roasted	$ 8.87	1,816,848	1.00	1,816,848
Cocoa paste not defatted	$ 4.07	474,677	1.25	593,346
Cocoa paste partially defatted	$ 0.49	85,712	1.25	107,141
Cocoa butter, fat oil	$ 6.25	586,495	1.33	780,038
Cocoa powder not containing added sugar	$ 4.43	684,347	1.18	807,530
Cocoa Powder Containing sugar	$ 0.36	55,656	1.18	65,675
Chocolate containing cocoa in blocks > 2 kg in slabs or bars	$ 7.52	933,661	0.40	373,465
Chocolate containing cocoa in blocks, slabs or bars < 2 kg	$ 8.06	673,411	0.40	269,365
Chocolate containing cocoa in blocks, slabs or bars not filled < 2kg	$ 8.06	635,495	0.40	254,198
Chocolate containing cocoa NOT in blocks	$ 21.66	1,600,737	***0.20***	***320,147***
TOTAL EXPORTS 2023	***$ 69.76***	***7,547,040***		***5,387,750.86***

PRODUCTION OF COCOA BEANS (thousand tonnes)

2023

	2021/22		Estimates 2022/23		Forecasts 2023/24	
Africa	**3589**	**74%**	**3719**	**73.7%**	**3042**	**70.2%**
Cameroon	295		270		300	
Côte d'Ivoire	2121		2241		1740	
Ghana	683		654		450	
Nigeria	280		315		300	
Others	210		240		252	
Americas	**973**	**20%**	**1077**	**21.3%**	**1035**	**23.9%**
Brazil	220		220		200	
Ecuador	365		454		430	
Others	388		403		405	
Asia & Oceania	**265**	**5%**	**253**	**5.0%**	**255**	**5.9%**
Indonesia	180		160		160	
Papua New Guinea	42		43		45	
Others	43		50		50	
World total	**4826**	**100%**	**5050**	**100%**	**4332**	**100%**

Source : ICCO Quarterly Bulletin of Cocoa Statistics, Vol. L, No.3, Cocoa year 2023/24

Published : 30-08-2024

Note : Totals may differ from sum of constituents due to rounding.

2023

It looks good, we will continue analyzing the Exports of 2023 using this database..

All the references cited and used for our inferences are shown in slide 35-36

Customer Segments

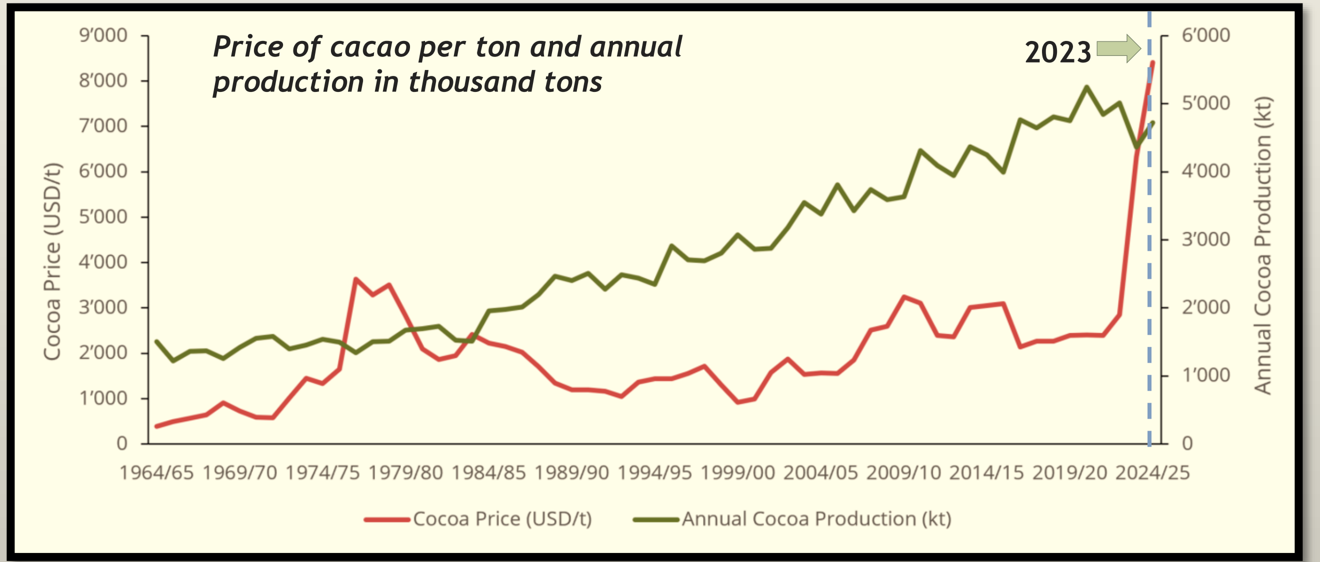
What is imported by the midstream & downstream?

All the references cited and used for our inferences are shown in slide 35-36

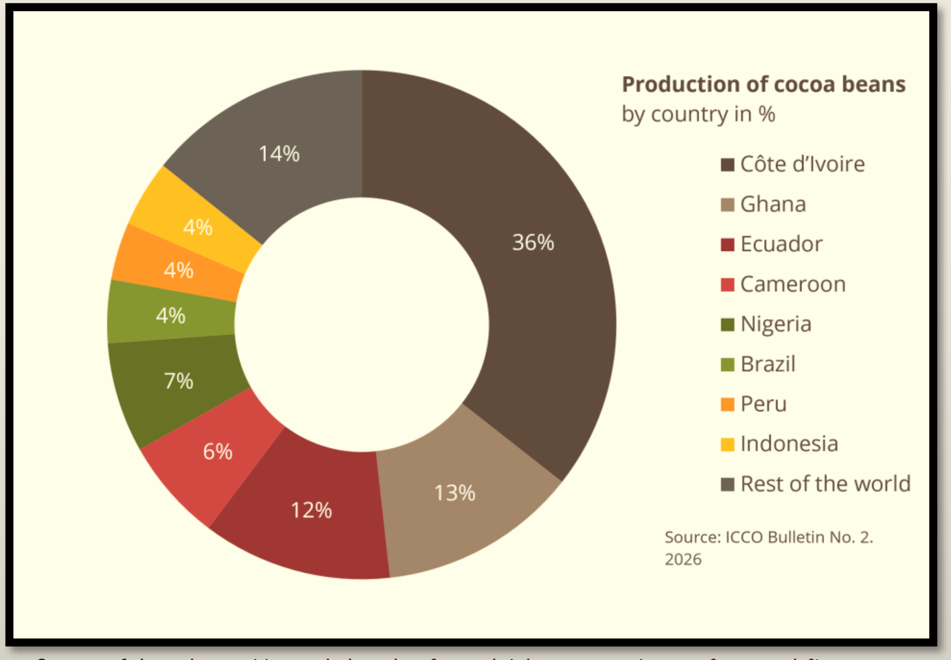
The Exports of cacao and products manufactured with cocoa or chocolate subproducts should be converted into cacao beans equivalents for a good comparison of exports data

Cacao Global Exports 2023

- We also decided to cross-check with some other reference websites, which include the conversion of all the cocoa-chocolate products into cacao equivalents.



Source of data: https://www.kakaoplattform.ch/about-cocoa/cocoa-facts-and-figures



Source of data: https://www.kakaoplattform.ch/about-cocoa/cocoa-facts-and-figures
This is for year 2025/2026. But it gives us a general indication of what we can expect from the 2022/2023 analysis.

Customer Segments

What is imported by the midstream & downstream?

All the references cited and used for our inferences are shown in slide 35-36

The Exports of cacao and products manufactured with cocoa or chocolate subproducts for the year 2023 is represented in the following charts.

Cacao Global Exports 2023

2023

- The cacao exports (and re-exports) show interesting aspects that we will share using the 2023 data.
- In the table below we can observe, by individual category that the Chocolate containing cocoa not sold in blocks (which corresponds to midstream and downstream players) is the higher one. The second important category in terms of exports are the cacao beans.
- Additionally, if we aggregate the three categories of chocolate containing cocoa in blocks, slabs or bars (in bulk packing > 2kg, or < 2kg), we can perceive that chocolate containing cocoa is even greater than the first two categories. This market niche is the one of Barry Callebaut.

Analysis per category Cacao EXPORTS 2023

Code	Name Product	Trade (000sUS$)	Trade (billion USD)	Volume (Kg)	Volume Tons	% Trade	% volume	Price per kg average
180100	Cocoa beans whole/broken raw or roasted	$ 8,868,620.38	$ 8.87	3,633,695,536.82	1,816,847.77	13%	24%	$ 2.44
180310	Cocoa paste not defatted	$ 4,072,265.01	$ 4.07	949,353,458.32	474,676.73	6%	6%	$ 4.29
180320	Cocoa paste partially defatted	$ 485,851.87	$ 0.49	171,424,930.33	85,712.47	1%	1%	$ 2.83
180400	Cocoa butter, fat oil	$ 6,245,425.09	$ 6.25	1,172,989,027.45	586,494.51	9%	8%	$ 5.32
180500	Cocoa powder not containing added sugar	$ 4,432,884.95	$ 4.43	1,368,694,601.47	684,347.30	6%	9%	$ 3.24
180610	Cocoa Powder Containing sugar	$ 363,479.26	$ 0.36	111,312,715.71	55,656.36	1%	1%	$ 3.27
180620	Chocolate containing cocoa in blocks > 2 kg in slabs or bars	$ 7,522,207.41	$ 7.52	1,867,322,533.26	933,661.27	11%	12%	$ 4.03
180631	Chocolate containing cocoa in blocks, slabs or bars < 2 kg	$ 8,059,533.26	$ 8.06	1,346,822,848.90	673,411.42	12%	9%	$ 5.98
180632	Chocolate containing cocoa in blocks, slabs or bars not filled < 2kg	$ 8,055,625.52	$ 8.06	1,270,990,720.98	635,495.36	12%	8%	$ 6.34
180690	Chocolate containing cocoa NOT in blocks	$ 21,659,054.44	$ 21.66	3,201,473,581.32	1,600,736.79	31%	21%	$ 6.77
	TOTAL EXPORTS 2023	***$ 69,764,947.19***	***$ 69.76***	***15,094,079,954.55***	***7,547,039.98***	***100%***	***100%***	

35%

Source of data: https://wits.worldbank.org/trade/comtrade/en/country/ALL/year/ for exports in all the categories of cacao-cocoa and chocolate. We have reviewed the database of UNComtrade and checked with ICO or ICCO for a secure data. Eleonora Escalante Strategy Research division has reviewed and extrapolated any missing data from other well trusted sources. Our margin of error is of 7 % standard deviation. This margin of error is generally acceptable for exploratory research, pilot studies and general picture description of a situation.

Cacao and Coffee 101.
Success Strategies for Small Farm Holders

2023

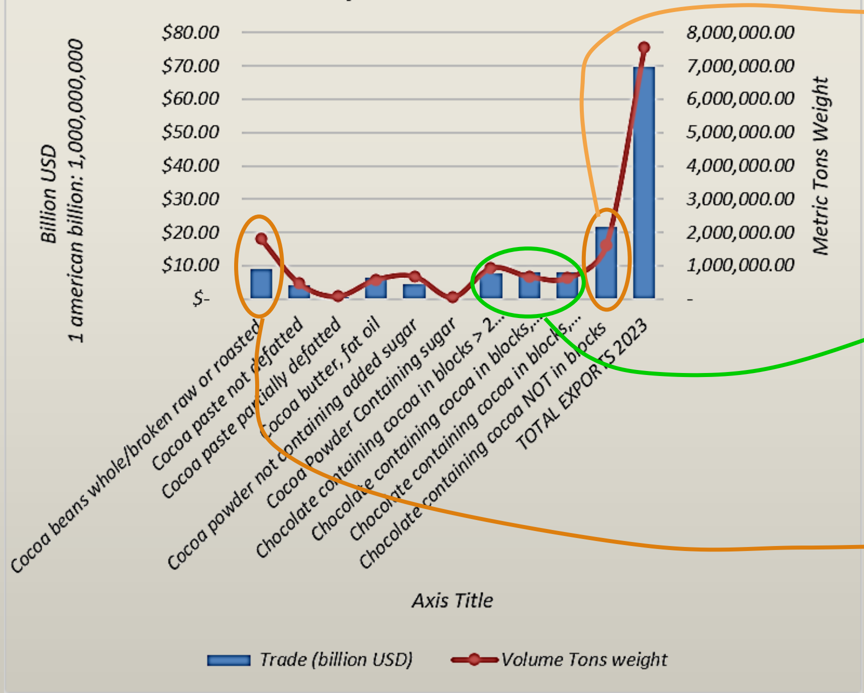
Customer Segments

What is imported by the midstream & downstream?

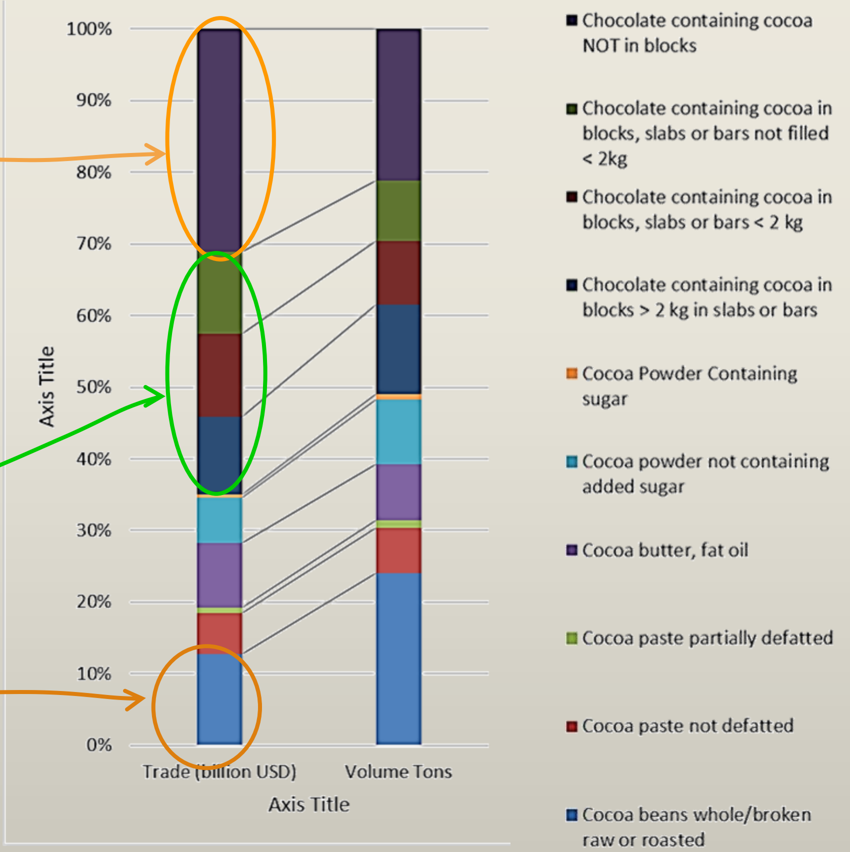
The Exports of cacao per category of product during 2023 shows the two main categories of trade (see the round in orange):
1. Cocoa beans
2. Chocolate containing cocoa not in blocks.

But if we add the 3 categories of chocolate in blocks, bars and slabs 180620 (in format of bulk > 2kg), 180631 (filled < 2kg), and 180632 (not filled < 2kg) see the round in green color, we are facing more than 35% of the global exports!.

Cacao Global Exports 2023



Cacao Global Exports per Category of cocoa Product Year 2023



Source of data: https://wits.worldbank.org/trade/comtrade/en/country/ALL/year/ for exports in all the categories of cacao-cocoa and chocolate. We have reviewed the database of UNComtrade and checked with ICO or ICCO for a secure data. Eleonora Escalante Strategy Research division has reviewed and extrapolated any missing data from other well trusted sources. Our margin of error is of 7 % standard deviation. This margin of error is generally acceptable for exploratory research, pilot studies and general picture description of a situation.

All the references cited and used for our inferences are shown in slide 35-36

Cacao and Coffee 101.
Success Strategies for Small Farm Holders

2023

Customer Segments

What is imported by the midstream & downstream?

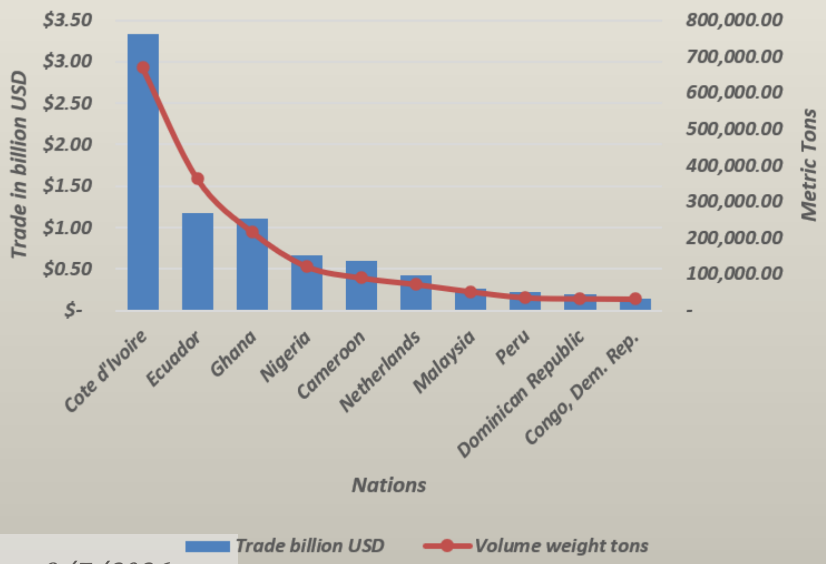
All the references cited and used for our inferences are shown in slide 35-36

These three charts represent the two main categories of exports with greater economic value for the top 10 exporter nations of 2023:
1. Cocoa Beans
2. Chocolate containing cocoa not in blocks

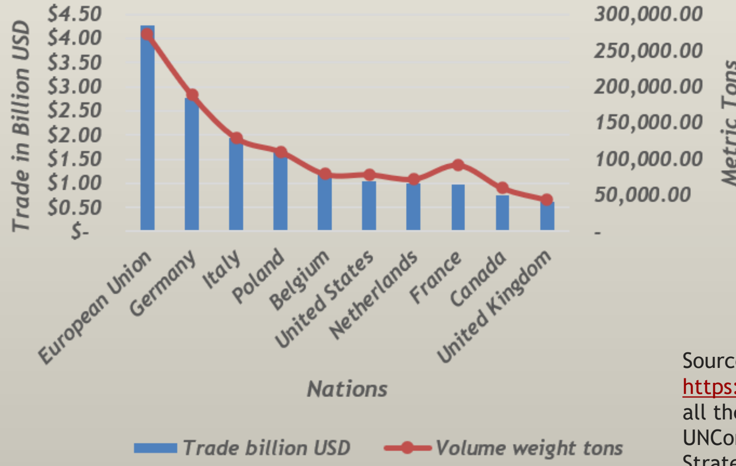
Cacao Global Exports 2023

- The Analysis per country year 2023 for the 2 main categories: cocoa beans and chocolate containing cocoa and other food preparations not in blocks, shows what country is doing and exporting what, and the relevance or degree of importance for each of these nations measured in economic value and metric tons.

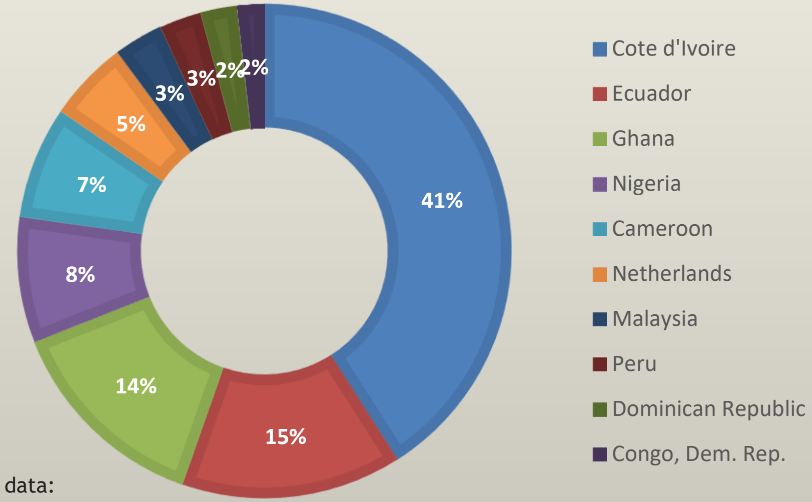
Cocoa Beans whole or broken, raw or roasted per country Exports of top 10 nations Year 2023



Chocolate containing cocoa and other food preparations NOT in blocks Top 10 nations year 2023



Cocoa Beans Exports top 10 nations year 2023
In % of Trade billion USD



Source of data: https://wits.worldbank.org/trade/comtrade/en/country/ALL/year/ for exports in all the categories of cacao-cocoa and chocolate. We have reviewed the database of UNComtrade and checked with ICO or ICCO for a secure data. Eleonora Escalante Strategy Research division has reviewed and extrapolated any missing data from other well trusted sources. Our margin of error is of 7 % standard deviation. This margin of error is generally acceptable for exploratory research, pilot studies and general picture description of a situation.

Cacao and Coffee 101.
Success Strategies for Small Farm Holders

2023

Customer Segments

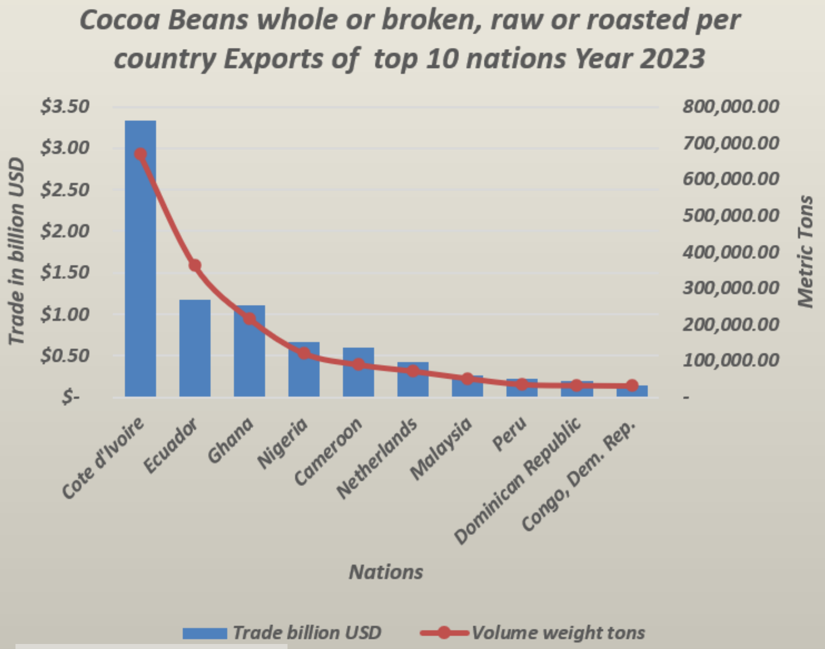
What is imported by the midstream & downstream?

All the references cited and used for our inferences are shown in slide 35-36

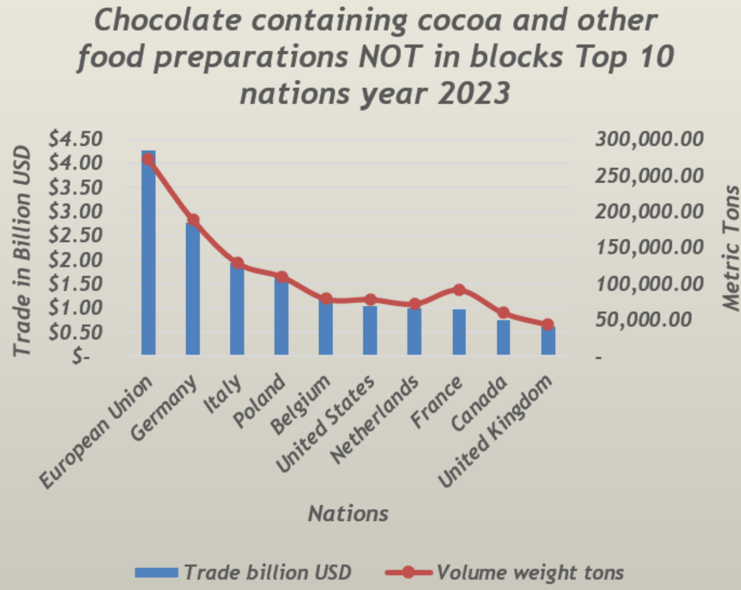
These three charts represent the two main categories of exports with greater economic value at the top 10 exporter nations of 2023:
1. Cocoa Beans
2. Chocolate containing cocoa not in blocks

Cacao Global Exports 2023

- In terms of cacao, our idea is to provoke a profound strategic reflection about the different patterns for cacao beans exporter nations (where the small-farmers harvest from the orchards) that can add economic value to the beans. How can the small farmers raise the value of their beans, or how can they start the manufacturing process of semi-finished or finished products containing cocoa of high-quality? Is it possible? Is there a middle point that cacao farmers could develop by establishing a PDO program (PDO: Protected Designation of origin program)



How can we build value propositions to raise the value of the cacao beans (get more money per kg of weight of cacao) or by entering in other semi-finished cocoa products to raise the income of the tropical belt nations small-farmers?



Source of data: https://wits.worldbank.org/trade/comtrade/en/country/ALL/year/ for exports in all the categories of cacao-cocoa and chocolate. We have reviewed the database of UNComtrade and checked with ICO or ICCO for a secure data. Eleonora Escalante Strategy Research division has reviewed and extrapolated any missing data from other well trusted sources. Our margin of error is of 7 % standard deviation. This margin of error is generally acceptable for exploratory research, pilot studies and general picture description of a situation.

2023

Customer Segments

What is imported by the midstream & downstream?

Why does the European Union appear as a main re-exporter of cacao?

Cacao Global Exports 2023

- We also decided to cross-check where does the EU re-export Cacao in all its multiple forms?
- Analysis 2023. Data from UNComtrade and WITS database World Bank

HS code	180100 Cocoa beans		180310 Cocoa paste not defatted		180320 Cocoa paste wholly-partly defatted		180400 Cocoa Butter fat & oil		180500 Cocoa Powder not containing sugar	
	Countries sum 80% of total exports	US $ Millions	Countries sum 80% of total exports	US $ Millions	Countries sum 80% of total exports	US $ Millions	Countries sum 80% of total exports	US $ Millions	Countries sum 70% of total exports	US $ Millions
EU re-exports to what nations and $	Russian Federation	20	Turkey	75	Singapore	18	United Kingdom	177	United States	259
	Belarus	13	Ukraine	59	Malaysia	3	Switzerland	157	Turkey	123
	Switzerland	10	Russian Federation	47	Indonesia	3	Turkey	77	Russian Federation	115
	Canada	6	Switzerland	44	Brazil	2.3	Ukraine	40	United Kingdom	66
			United Kingdom	34	Uruguay	2.3	Norway	30	Algeria	51
			Norway	16					Egypt, Arab Rep.	47
			China	14					Ukraine	32
			Belarus	14					Japan	28
			United States	10					México	25
TOTAL ALL nations EU		***65.9***		***400.5***		***34.8***		***602***		***1,093.9***

Source of data: https://www.kakaoplattform.ch/about-cocoa/cocoa-facts-and-figures

All the references cited and used for our inferences are shown in slide 35-36

2023

Customer Segments

What is imported by the midstream & downstream?

Why does the European Union appear as a main re-exporter of cacao?

Cacao Global Exports 2023

- This is the continuation from last slide… We want to be sure that we have not repeated the values of the EU in our work

HS Code	180610 Cocoa powder containing sugar		180620 Chocolate containing cocoa, blocks bars and slabs > 2 kg		180631 Chocolate containing cocoa in blocks, bars, slabs filled < 2kg		180632 Chocolate containing cocoa blocks, bars slabs not filled <2 kg		180690 Chocolate and other food containing cocoa not in blocks	
	Countries sum 70% of total exports	US $ Millions	Countries sum 80% of total exports	US $ Millions	Countries sum 70% of total exports	US $ Millions	Countries sum 75% of total exports	US $ Millions	Countries sum 65% of total exports	US $ Millions
EU re-exports to what nations and $	United Kingdom	11.4	United Kingdom	266	United Kingdom	534	United Kingdom	558	United Kingdom	1,241
	United Arab Emirates	3.0	United States	164	United States	172	Russian Federation	224	United States	449
	Kuwait	2.2	Russian Federation	79	Russian Federation	115	United States	180	Switzerland	190
	United States	1.4	Saudi Arabia	49	Switzerland	69	Australia	55	Russian Federation	172
	Morocco	1.4	Canada	47	Norway	64	Canada	48	Australia	171
	Turkey	1.2	Korea, Rep.	46	Ukraine	63	Serbia, FR Serbia/Montenegro	40	Canada	159
	Switzerland	1.2	China	45	Saudi Arabia	61	Switzerland	37	Japan	132
	Saudi Arabia	1.1	Japan	35	United Arab Emirates	56	Israel	36	Norway	127
	Norway	0.9	Norway	32	Turkey	49	China	32	Hong Kong, China	123
Total all nations EU		35		1,085.9		1,730		1,638.9		4,270

All the references cited and used for our inferences are shown in slide 35-36

Source of data

These nations and respective categories are a good niche of opportunity for small farmers in the tropical belt nations.

2023

Customer Segments

What is imported by the midstream & downstream?

The EU is re-exporting to non-members countries of the EU

Cacao Global Exports 2023

- The 5 categories of major relevance for the EU to re-export cocoa are as follows: The total of re-exports in these 5 categories is: 9,818.7 million USD (or 9.8 billion USD) for the year 2023. The EU is re-exporting to non-EU countries.

HS Code	180500 Cocoa Powder not containing sugar (Called cocoa cake)		180620 Chocolate containing cocoa, blocks bars and slabs > 2 kg		180631 Chocolate containing cocoa in blocks, bars, slabs filled < 2kg		180632 Chocolate containing cocoa blocks, bars slabs not filled <2 kg		180690 Chocolate and other food containing cocoa not in blocks	
	1,093.9	US $ Millions	1,085.9	US $ Millions	1,730	US $ Millions	1,638.9	US $ Millions	4,270	US $ Millions
EU re-exports to what nations and $	United States	259	United Kingdom	266	United Kingdom	534	United Kingdom	558	United Kingdom	1,241
	Turkey	123	United States	164	United States	172	Russian Federation	224	United States	449
	Russian Federation	115	Russian Federation	79	Russian Federation	115	United States	180	Switzerland	190
	United Kingdom	66	Saudi Arabia	49	Switzerland	69	Australia	55	Russian Federation	172
	Algeria	51	Canada	47	Norway	64	Canada	48	Australia	171
	Egypt, Arab Rep.	47	Korea, Rep.	46	Ukraine	63	Serbia, FR Serbia/Montenegro	40	Canada	159
	Ukraine	32	China	45	Saudi Arabia	61	Switzerland	37	Japan	132
	Japan	28	Japan	35	United Arab Emirates	56	Israel	36	Norway	127
	México	25	Norway	32	Turkey	49	China	32	Hong Kong, China	123
Total all nations EU	1,093.9			1,085.9		1,730		1,638.9		4,270

All the references cited and used for our inferences are shown in slide 35-36

Customer Segments

2023

What is imported by the midstream & downstream?

All the references cited and used for our inferences are shown in slide 35-36

The European Union has established a robust codependence towards the tropical belt nations when we land into coffee, cacao, tea and spices.

- It is important for the small farmers to consider every single option of new geographic market niches, and new cacao-cocoa-chocolate categories.
- Ecuador has used the PDO (Protected Denomination of Origin) to differentiate their cacao beans.
- Some countries in Africa and Asia are exporting cacao paste or cacao cake (Cocoa powder).
- Coffee has a possible chance if a PDO system is established for the beans, and maybe the roasting option.

Cacao Global Exports 2023

- For the European Union, the top import category is coffee, tea, cocoa and spices, when it comes to the agri-food imports. It has always been like that since the Tropical Belt Nations began to plant Coffee, Tea, and Cacao for international trading.
- The EU re-exports cacao and coffee to other Non-EU members. There is a market geographic niche with good possibilities there. Small-Farmers must open to other geographic countries beyond the EU.

TABLE 8

EU AGRI-FOOD IMPORTS - TOP 15 IMPORT PRODUCT CATEGORIES (million EUR)

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2024	2025	*Share 2025*	Jan. 2025	Jan. 2026	*Difference*	
TOTAL AGRI-FOOD	**172 418**	**188 640**	***100%***	**16 085**	**14 387**	***- 1 698***	***-11%***
Coffee, tea, cocoa and spices	30 326	41 543	*22%*	3 534	2 880	- 654	*-19%*
Fruit and nuts	24 953	28 688	*15%*	2 293	2 281	- 12	*-1%*
Oilseeds and protein crops	20 129	18 521	*10%*	1 667	1 347	- 320	*-19%*
Non-edible for technical use	9 683	10 277	*5%*	894	763	- 131	*-15%*
Cereals	9 796	8 680	*5%*	911	642	- 269	*-30%*
Preparations of fruit, nuts and vegetables	7 591	7 768	*4%*	698	641	- 58	*-8%*
Vegetable oils (oilseeds and palm)	7 856	7 567	*4%*	617	603	- 14	*-2%*
Vegetables	6 173	6 241	*3%*	602	571	- 31	*-5%*
Mixed food preparations and ingredients	6 544	6 714	*4%*	542	501	- 41	*-8%*
Tobacco, cigars and cigarettes	5 105	5 384	*3%*	488	478	- 10	*-2%*
Other animal products	5 080	5 551	*3%*	492	441	- 51	*-10%*
Cereal preparations and milling products	5 242	5 350	*3%*	467	429	- 37	*-8%*
Margarine and other oils and fats (vegetable)	4 178	4 946	*3%*	336	373	37	*11%*
Beef and veal	2 645	3 414	*2%*	273	349	76	*28%*
Spirits and liqueurs	4 380	4 312	*2%*	284	282	- 2	*-1%*
Other products	22 736	23 685	*13%*	1 989	1 808	- 180	*-9%*

Source of data
https://webgate.ec.europa.eu/circabc-ewpp/d/d/workspace/SpacesStore/a4544864-633f-43d2-bf94-36e40d8920cc/download

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Success Strategies for Small Farm Holders

Customer Segments

Let´s observe what is imported by the midstream & downstream

All the references cited and used for our inferences are shown in slide 35-36

Currently, the 5 most important importers of coffee and cacao are:

1. **MNCs Vertically Integrated conglomerates:** Starbucks, Nestlé, etc.
2. **Country level Intermediaries:** National coffee or cacao associations, Big cooperatives.
3. **Midstream Semifinished Processors:** As Cocoa Paste or cocoa butter products, as Coffee Roasters/Decaf specialists.
4. **Bean Traders:** Intermediaries who buy the beans and transfer it to other midstream or upstream players. Example: Cargill, Olam, Ecom, etc.
5. **Downstream Big retailers:** Confectionary big manufacturers, Bakeries, etc.

What is important for the midstream and downstream players?

1. Source of origin of the beans (Geographic Indicators)
2. Traceability.
3. Beans come from certified planters
4. Beans are fairtrade-organic
5. Beans come from one single farm
6. Good food-safety measures of the remotion of mucilage and the quality of the fermentation-drying process of the beans
7. Plantations are environmentally friendly
8. Specialty Beans are of high quality-formula: the flavor & aroma characteristics = genetics of the variety + terroir + cultivation practices.
9. Variety of the plant
10. No diseases

There is a mismatch

Despite the importance of the certifications and geographic Indications, most of the trade is passing through all the filters of the midstream-downstream players located at the EU.
The intermediaries (Bean traders) rely on other intermediaries, and the transference of information about the quality of the beans (cacao or coffee) is not all the time transparent.

However, the beans are commercially traded, imported and categorized using the following categories now:

Coffee beans:

Roasted Decaf	Not Roasted Decaf
Roasted not Decaf	Not Roasted Not Decaf

Cacao beans:

Cocoa beans whole/broken raw or roasted

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FRANCE | EUROPEAN UNION

AOC = PDO

Customer Segments

Selection of 3 possible customer segments for Small-Farm holders using a new PDO system

All the references cited and used for our inferences are shown in slide 35-36

Our interest is to raise the value of the cacao and coffee beans from the Tropical Belt Nations.
After analyzing the data from United Nations, we are truly convinced that there is no other path for the small farmers upstream producers than to elaborate an Appellation D´Origine Controlée, that is called PDO by the European Union: Protected Designation of Origin (PDO)

Cacao

Customer Segment 1: Cocoa beans Specialty-High quality

A MNC that wants to buy a mix of Ecuadorian Heirloom and Ancient Nacional and other varieties of cacao with Floral and Nutty flavors, fairtrade organic, with a Protected Designation of Origin (PDO) validated by the European Union.
The MNC wants to work with 300 small farmers (aggregated total land of 3,000-4,000 hectares).
The MNC wants all the small farmers to set a PDO program with the following elements: Air quality control, moisture control, rainfall management, waste residual management, sunlight-shade management, temperature control, wind mitigation, and testing of the mix of varieties for the flavor required.

Customer Segment 2: Cocoa paste and Cocoa butter.

A cocoa intermediary wants to buy cocoa paste and cocoa butter directly to 500 Peruvian small farmers associated in the production of cacao (aggregated total land between 4,000 to 6,000 hectares).
The company wants the cocoa paste coming from a mix of 5 different varieties: amelonado, Iquitos, Marañon; Nanay and Forastero.
The prerequisite: All farmers must agree to set a PDO program with the same elements listed above.

Coffee

Customer Segment 3: Roasted Coffee-not decaf

A MNC wants to buy a specific mix of coffee of at least 7 varieties from Central America, to help them to reach a PDO program.
The MNC wants to work with 300 small farmers (aggregated production from a total land of 3,000-4,000 hectares).
The MNC wants to build a matrix using different blends from the varieties to establish a relationship between 3 types of roasting and 5 types of flavors

Blends Matrix of 7 varieties

Flavors
1. Nutty
2. Floral
3. Earthy
4. Fruity
5. Spiced

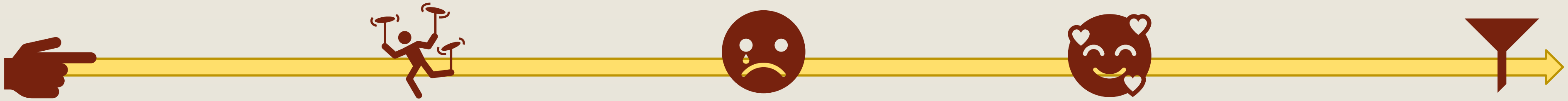
Roasted
1. Light
2. Medium
3. Dark

Customer Segments

Next Week: Generic CVPs for Small Farm holders

The Customer Profile

All the references cited and used for our inferences are shown in slide 35-36



Select customer segment

Select a Customer Segment that you want to profile

Identify Customer Jobs

Ask what tasks your customers are trying to complete. Map out all their jobs by writing each one on an individual sticky note or Post-it.
Use the criteria explained to classify them

Identify Customer Pains

What pains do your customers have?
Write down as many as you can come up with, including problems, unresolved requests, lack offs, obstacles and risks
Use sticky notes.

Identify Customer Gains

What improvements or value-added features and benefits do your client want to achieve?
Write down as many gains as you can find.
Use sticky notes

Prioritize jobs, pains and gains

Categorize jobs, pains and gains in a prioritization column, as you can see in slide 14.

Customer Segments

Next Week: Generic CVPs for Small Farm holders

All the references cited and used for our inferences are shown in slide 35-36

The Customer Profile

Customer Jobs

Customer jobs describe:

- What customers are trying to achieve?
- What activities are they trying to accomplish?
- What jobs are the clients to get done?
- What chores or duties or responsibilities are they trying to succeed?
- What assignments or lines of work are they trying to complete?

Customer Gains

Gains or wants are described as:

- Benefits or results that clients **want**
- Upshots the clients **crave** essentially to perform the jobs
- Advantages or improvements that will make the client happy
- Gains can be required, expected, desired or unexpected.
- Gains are benefits, results, outcomes, advantages or characteristics that customers wish.

Customer Pains

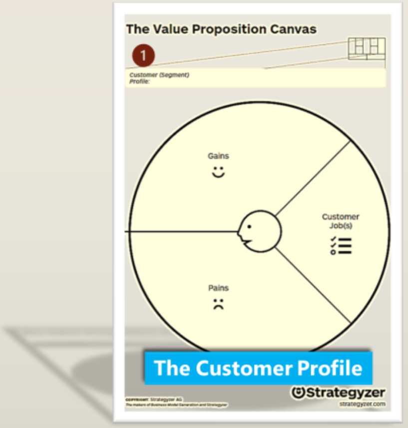
Pains are described as:

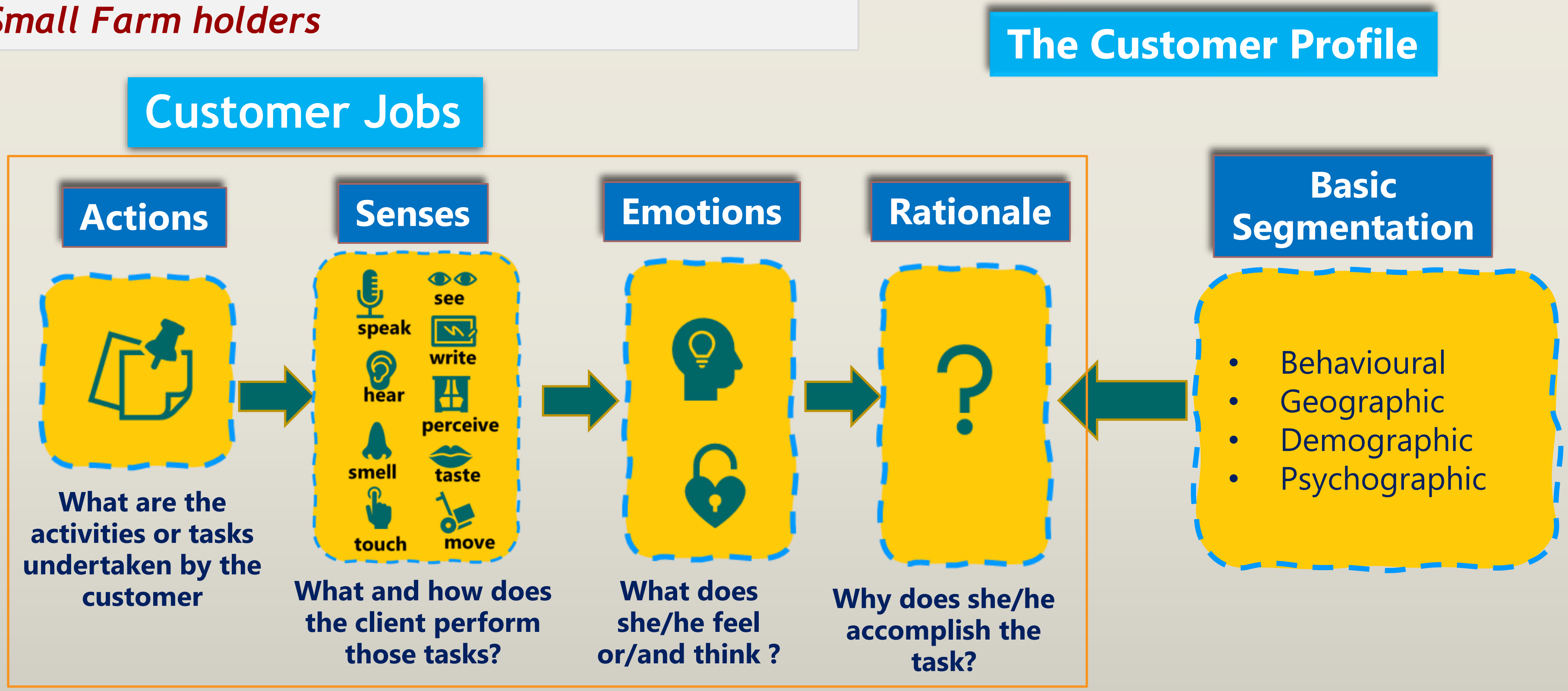
- Anything that annoys or cause anguish/upset or displease the client before, during and after he/she is trying to get a job done.
- Obstacles that prevent the client to accomplish an activity or endeavour.
- Pains are undesired outcomes
- Pains are problems
- Pains are undesired characteristics of the job the realize
- Pains are also risks or undesired potential outcomes or negative consequences.
- Pains are Lack of something, or an absence, deficiency, or a necessity not fulfilled.

Customer Segments

Next Week: Generic CVPs for Small Farm holders

All the references cited and used for our inferences are shown in slide 35-36



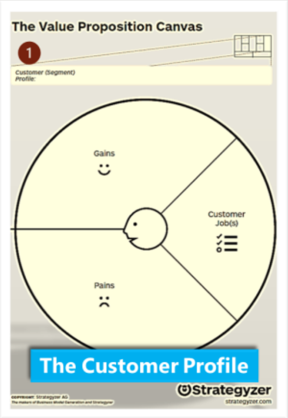


Customer Segments

Next Week: Generic CVPs for Small Farm holders

The Customer Profile

The prioritization of the features of jobs, gains and pains can only occur if we describe them as concrete as possible under specific contexts for the customer segment in demand.



Customer Jobs

Level of Job Importance

+Important

- Insignificant

Customer Gains

Grade Gain Relevance

\+ Essential

- Nice to Have

Customer Pains

Degree Pain severity

\+ Extremely high

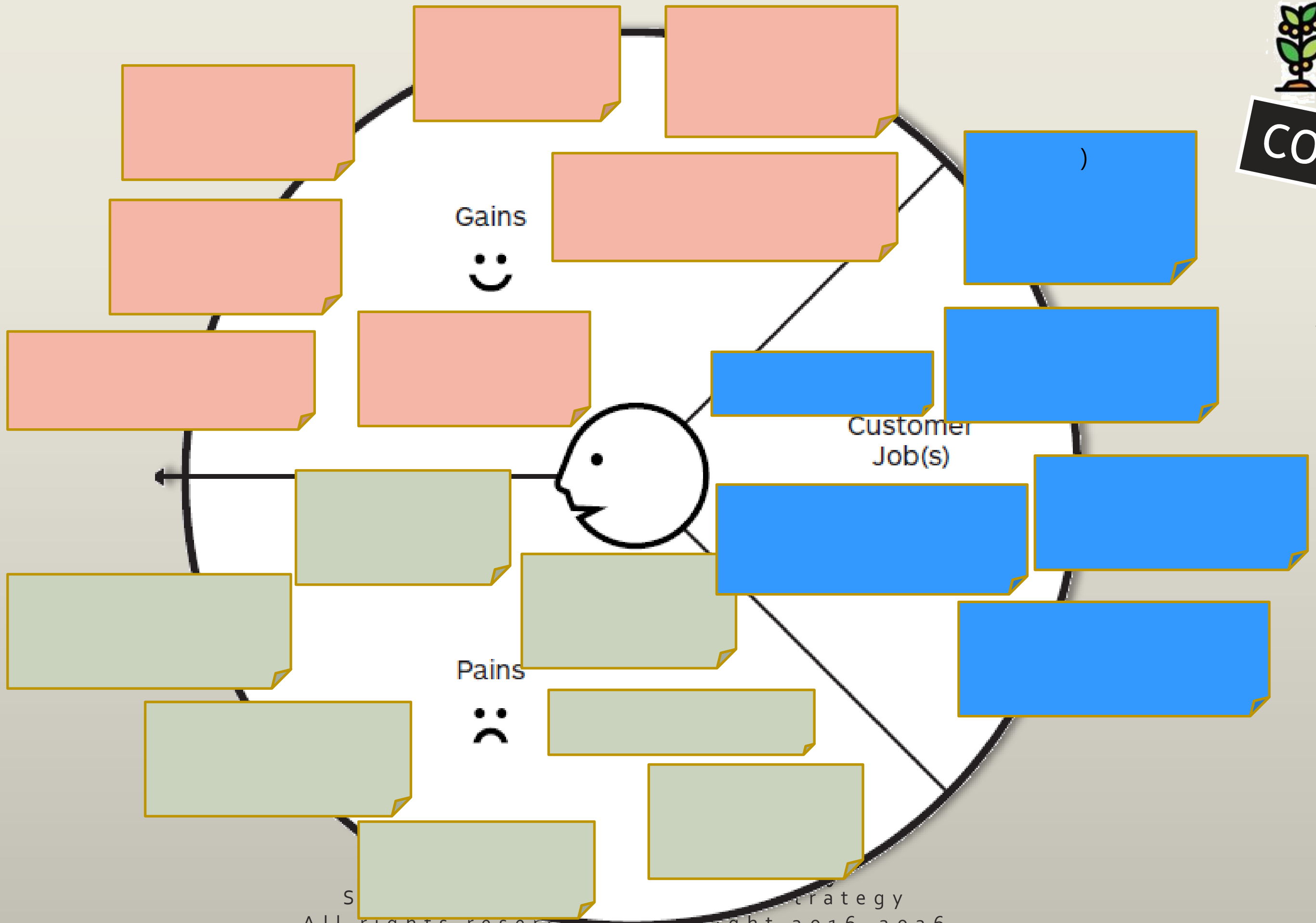
-Moderate or low

All the references cited and used for our inferences are shown in slide 35-36

Customer Segments

Next week: Generic CVPs for Small Farm holders

All the references cited and used for our inferences are shown in slide 35-36



The Customer Profile

Next Week
We will build 1 CVP for coffee and 2 CVPs for Cacao

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Customer Segments

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All the variables measured by the AOC (Appellation origin controlee) terroir assessment are sources of projects that will require climate change financing. Can you see the link that connects the harvests with possibilities of green finance?

Customer Segments

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All the variables measured by the AOC (Appellation origin controlee) terroir assessment are sources of projects that will require climate change financing.
Can you see the link that connects the harvests with possibilities of green finance?

Photo from Microsoft Stock Images

Thank you

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https://eleonoraescalantestrategy.com/