

**Seminar on achieving sustainable supply in  
the coffee market – Draft programme****London, 4 March 2014 (09:00 – 17:30)**

1. The Executive Director presents his compliments and has the pleasure of inviting Members, Private Sector Consultative Board (PSCB) associations and observers to attend the ICO Seminar on achieving sustainable supply in the coffee market on Tuesday, 4 March 2014. The event will be chaired by Conradin Rasi of Switzerland and will take place at the headquarters of the Organization at 22 Berners Street, London W1T 3DD, during the week of the 112<sup>th</sup> Session of the Council (see document ED-2170/13). Simultaneous interpretation will be provided in English, French, Portuguese and Spanish.

2. The objective of the Seminar is to provide information to Members on the proposed topic. A preliminary draft programme is attached as Annex I. The event is being organized and marketed by Informa.

**Registration – ICO Members**

3. Each ICO Member Government (see Annex II) will be allocated **two free places**. Members are requested to consult the head of their delegation for the 112<sup>th</sup> Session before registering for the free places, to avoid any overlap or duplication. Members can register by completing and returning the attached form to the ICO (Annex III). Alternatively, Members can register for the two free places for each delegation in consultation with the head of their delegation on Monday 3 March at the ICO Registration Desk. It is possible that a few additional places may be available if some countries are not represented at the meetings or send only one delegate. Members interested in an additional place should advise the Secretariat either by email before the meeting or let the Registration Desk know by 14:00 on Monday 3 March. Any available places will then be allocated at the end of Monday 3 March. A maximum of one additional place will be allocated per delegation depending on availability.

4. The Seminar Proceedings will be available online (with a username and password) free of charge to Members after the event.

**Registration – signatory Governments, PSCB, Core Group advisors, statistics experts**

5. Each signatory Government, PSCB Association, Core Group advisor and ICO statistics expert will be allocated **one free place** (see Annex II). Participants can register by completing and returning the attached form (Annex III) to the ICO or alternatively, registering for the free place for each country or association on Monday 3 March at the ICO Registration Desk.

6. The Seminar Proceedings will be available online (with a username and password) free of charge to signatory Governments, PSCB Associations, Core Group advisors and ICO statistics experts after the Seminar.

**Registration – fee paying participants**

7. For all other participants, including former ICO Members which have not yet completed any of the procedures for membership, there is a registration fee of £450 + 20% VAT or £250 + 20% VAT in the case of delegates involved in coffee production from producing countries. A discount of £95 is available to delegates paying the standard delegate rate if booked before **31 January 2014**. The registration fee includes online access to the Seminar Proceedings immediately following the event. Lunch is included. Space is strictly limited so early registration is recommended.



INTERNATIONAL  
COFFEE  
ORGANIZATION

ANNEX I

**Tuesday 4th March 2014**

ICO Building, 22 Berners Street London, W1T 3DD, UK

# THE Coffee SEMINAR

**Achieving  
sustainable supply  
in the coffee  
market:**

Overcoming  
the current  
over-supply and its  
detrimental effect  
on coffee prices

## Guest speakers include:



**Karsten Ranitzsch**  
Head of Coffee  
**Nestlé Nespresso S.A.**



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



**Stefan Uhlenbrock**  
Senior Commodity Analyst  
**F.O. Licht**



**Edward George**  
Head of Soft Commodities Research  
**Ecobank**



**Kona Haque**  
Head of Agricultural Commodities Research  
**Macquarie Bank Limited**



**Tanvi Savara**  
Food & Drink Analyst  
**Datamonitor Consumer**



**Keith Flury**  
Agricultural Strategist  
**BNP Paribas**



**Emile Mehmet**  
Head of Bulk Commodities  
**The Public Ledger**

Taking place in the same week and venue when the International Coffee Council and other ICO bodies meet, this is your unique opportunity to:

**NETWORK** with 100+ ICO members and key decision-makers from around the world

**GAIN** vital industry insights into coffee production, demand and international trade movements

**JOIN** top-level discussion on the hottest commercial and political factors shaping the industry

**IDENTIFY** new opportunities and markets for coffee



Register online:

[www.coffee.agraevents.com](http://www.coffee.agraevents.com)

Registration Hotline:

**+44 (0) 20 3377 3658**



The event will be conducted in English, with simultaneous interpretation in Spanish, French and Portuguese.

Supported by :



**Public Ledger**

08.00 **Welcome Coffee and Registration**  
09.00 **Opening Remarks from the Chair**

## GLOBAL PRODUCTION AND TRADE OVERVIEW

- 09.10 **World Supply and Demand Outlook**  
**Stefan Uhlenbrock**  
Senior Commodity Analyst  
**F.O. Licht**
- 09.40 **Trading Below Cost: Examining What Needs to be Done to Change Things Around**  
  - Operating below the cost of production: For how much longer can this go on?
  - Assessing the impact of current low prices on future coffee supply
  - Reducing input costs – what can be done in practical terms**Judith Ganes-Chase**  
President  
**J. Ganes Consulting, LLC**
- 10.10 **Achieving Sustainability Through Quality Over Quantity**  
**Karsten Ranitzsch**  
Head of Coffee  
**Nestlé Nespresso S.A.**
- 10.40 **Questions**  
10.55 **Networking Coffee Break**

## CAPITALISING ON NEW TRENDS, NEW MARKETS AND NEW PRODUCT DEVELOPMENT

- 11.25 **Consumer & Innovation Trends and Future Growth Opportunities in Coffee**  
  - Examining the latest consumer preferences for coffee
  - Identifying key trends affecting this category
  - Capitalising on new trends and consumer behaviour, including examples of the latest innovation**Tanvi Savara**  
Food & Drink Analyst  
**Datamonitor Consumer**
- 11.55 **The Future of Coffee Consumption: The Impact of Emerging Market Demand on Prices Over the Next Decade**  
  - Areas to watch for demand growth
  - Short and long-term price outlook**Emile Mehmet**  
Head of Bulk Commodities  
**The Public Ledger**

12.25 **Questions**

12.35 **Lunch**

## PRICE FORECASTS, CURRENCY FLUCTUATIONS AND SOLUTIONS AVAILABLE FOR MANAGING PRICE VOLATILITY

- 14.00 **Coping with Volatility in the Coffee Value Chain**  
  - Fundamental outlook for global prices
  - For how much longer will price volatility continue?**Kona Haque**  
Head of Agricultural Commodities Research  
**Macquarie Bank Limited**
- 14.30 **Coffee and Currencies**  
  - Origin currencies fluctuations and impacts
  - USD and the coffee market
  - 2014 coffee price and FX outlook**Keith Flury**  
Agricultural Strategist, Commodity Markets Strategy  
Commodity Derivatives  
**BNP Paribas**
- 15.00 **Questions**
- 15.15 **Networking Coffee Break**

## SUPPLY-SIDE OUTLOOK

- 15.45 **Coffee Production Outlook for the Americas**  
  - Factors shaping competitiveness
  - Quantity vs Quality
  - The influence from the broader economic development on the coffee sector
- 16.15 **The Coffee Sector in Sub-Saharan Africa**  
  - Key producers, consumers & trade flows
  - Key traders & retailers of African coffee
  - The certified & specialist coffee market in SSA
  - The Ethiopia Commodity Exchange (ECX) – a model for African coffee marketing?
  - Key obstacles & opportunities for the sector**Edward George**  
Head of Soft Commodities Research  
**Ecobank**
- 16.45 **New Developments in the Asian Coffee Market**
- 17.15 **Questions**
- 17.30 **Closing Remarks From The Chairman**

**Get Involved  
as a Sponsor  
or Exhibitor**

Make the most of your time at The Coffee Seminar by developing your status as a major player. Sponsorship and exhibition opportunities are proven to deliver influence among key policy decision makers, increase enquiries for future contracts and grow your market share.

For promotional details please contact Sarah Harding on +44 (0)20 7017 7566, or email her at [sarah.harding@informa.com](mailto:sarah.harding@informa.com)

# REGISTER NOW!

## 3 Easy Ways to Register

**Phone:** +44(0)20 3377 3658

**Email:** [registrations@agra-net.com](mailto:registrations@agra-net.com)

**Online:** [www.coffee.agraevents.com](http://www.coffee.agraevents.com)

**Delegate  
Fee:**  
£450  
+20% VAT

**Coffee  
Producer Fee:**  
£250  
+ 20% VAT

**ICO  
Members:**  
Free of  
charge

For group discounts please call  
**Jamie Marquis** on  
+44 (0) 20 701 77338 or email  
[jamie.marquis@informa.com](mailto:jamie.marquis@informa.com)  
Conference code **184SR**



The International Coffee Organization (ICO) is the main intergovernmental organization for coffee, bringing together exporting and importing Members to tackle the challenges facing the world coffee sector through international cooperation. Its Member Governments represent 97% of world coffee production and over 80% of world consumption.

<p><b>TWO FREE PLACES PER DELEGATION:</b></p> <p><b>Exporting Members</b>  Angola  Bolivia, Plurinational State of  Brazil  Burundi  Cameroon  Central African Republic  Colombia  Costa Rica  Côte d'Ivoire  Cuba  Ecuador  El Salvador  Ethiopia  Gabon  Ghana  Guatemala  Honduras  India  Indonesia  Kenya  Liberia  Malawi  Mexico  Nicaragua  Panama  Papua New Guinea  Paraguay  Philippines  Rwanda  Sierra Leone  Tanzania  Thailand  Timor-Leste  Togo  Uganda  Vietnam  Yemen  Zambia  Zimbabwe</p> <p><b>Importing Members</b>  European Union  <i>Austria</i>  <i>Belgium</i>  <i>Bulgaria</i>  <i>Croatia</i>  <i>Cyprus</i>  <i>Czech Republic</i>  <i>Denmark</i>  <i>Estonia</i>  <i>Finland</i>  <i>France</i>  <i>Germany</i>  <i>Greece</i>  <i>Hungary</i>  <i>Ireland</i>  <i>Italy</i></p>	<p><i>Latvia</i>  <i>Lithuania</i>  <i>Luxembourg</i>  <i>Malta</i>  <i>Netherlands</i>  <i>Poland</i>  <i>Portugal</i>  <i>Romania</i>  <i>Slovakia</i>  <i>Slovenia</i>  <i>Spain</i>  <i>Sweden</i>  <i>United Kingdom</i></p> <p>Norway  Switzerland  Tunisia  Turkey  United States of America</p> <p><b>ONE FREE PLACE PER DELEGATION:</b></p> <p><b>Signatory Governments of the ICA 2007</b>  Benin  Congo, Dem. Rep. Of  Guinea  Madagascar  Nigeria</p> <p><b>ONE FREE PLACE PER DELEGATION:</b></p> <p><b>PSCB Members 2013/14</b></p> <p><b>Colombian Milds:</b></p> <ul style="list-style-type: none"> <li>• Federación Nacional de Cafeteros de Colombia (FNC)</li> <li>• <i>Sociedad Exportadora de Café de las Cooperativas de Caficultores (EXPOCAFÉ)</i></li> <li>• African Fine Coffees Association (AFCA)</li> </ul> <p><b>Other Milds:</b></p> <ul style="list-style-type: none"> <li>• Asociación Nacional del Café (Anacafé)</li> <li>• Coffee Exporters Association of India</li> </ul> <p><b>Brazilian and other Natural Arabicas:</b></p> <ul style="list-style-type: none"> <li>• Associação Brasileira da Indústria de Café (ABIC)</li> <li>• <i>Associação Brasileira da Indústria de Café Solúvel (ABICS)</i></li> <li>• <i>Conselho dos Exportadores de Café do Brasil (CeCafé)</i></li> <li>• Confederação da Agricultura e Pecuária do Brasil (CNA)</li> <li>• <i>Conselho Nacional do Café (CNC)</i></li> </ul> <p><b>Robustas:</b></p> <ul style="list-style-type: none"> <li>• Conseil du Café/Cacao (3C)</li> <li>• Indonesia Coffee Exporters Association (GAEKI)</li> <li>• <i>Uganda Coffee Federation (UCF)</i></li> </ul>	<p><b>Consumer representatives:</b></p> <ul style="list-style-type: none"> <li>• All Japan Coffee Association (AJCA)</li> <li>• Coffee Association of Canada (CAC)</li> <li>• European Coffee Federation (ECF)</li> <li>• Institute for Scientific Information on Coffee (ISIC)</li> <li>• National Coffee Association of USA (NCA)</li> <li>• Russian Association of Tea and Coffee Manufacturers (Rusteacoffee)</li> <li>• Specialty Coffee Association of America (SCAA)</li> <li>• Speciality Coffee Association of Europe (SCAE)</li> </ul> <p><b>Core Group advisors 2013/14</b></p> <ul style="list-style-type: none"> <li>• World Bank</li> <li>• Finance Alliance for Sustainable Trade (FAST)</li> <li>• Conselho Nacional do Café (CNC)</li> <li>• Sucafina SA</li> </ul> <p><b>Experts in statistics</b></p> <ul style="list-style-type: none"> <li>• Judy Ganes-Chase (J. Ganes Consulting LLC)</li> <li>• Euan Mann (Complete Commodity Solutions Ltd.)</li> <li>• Neil Rosser (OLAM Europe)</li> <li>• Rob Simmons (LMC International Ltd., United Kingdom)</li> <li>• Andrea Thompson (Coffee Network)</li> </ul> <p><b>Other:</b></p> <ul style="list-style-type: none"> <li>• Common Fund for Commodities (CFC)</li> <li>• InterAfrican Coffee Organisation (IACO)</li> </ul> <p><b>Seminar speakers and Chairperson</b></p>
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INTERNATIONAL COFFEE ORGANIZATION

22 Berners Street  
London W1T 3DD  
United Kingdom

**ICO SEMINAR ON ACHIEVING SUSTAINABLE SUPPLY IN THE COFFEE MARKET**  
**4 MARCH 2014 (09:00 – 17:30)**

**REGISTRATION FORM**  
**(Two free places for each ICO Member Government listed in Annex II)**

**ICO MEMBER GOVERNMENTS****1<sup>st</sup> FREE PLACE**

Title (Dr/Mr/Mrs/Ms): ..... First name: ..... Last name: .....

Name on registration badge: .....

Official position: ..... Organization: .....

Address: .....

Country: ..... Telephone: .....

Fax: ..... Email: .....

I will attend the Seminar as a member of the delegation of: .....

*(Please state name of ICO Member country)***2<sup>nd</sup> FREE PLACE**

Title (Dr/Mr/Mrs/Ms): ..... First Name: ..... Last Name: .....

Name on registration badge: .....

Official position: ..... Organization: .....

Address: .....

Country: ..... Telephone: .....

Fax: ..... Email: .....

I will attend the Seminar as a member of the delegation of: .....

*(Please state name of ICO Member country)*

This registration has been confirmed with the Head of Delegation for my country      YES ☐      NO ☐

Please give name so that this can be confirmed if necessary: .....

**Please send the completed form to:**

International Coffee Organization

22 Berners Street

London W1T 3DD

Email: [deschamp@ico.org](mailto:deschamp@ico.org)

Fax: +44 (0) 20 7612 0630

Tel: +44 (0) 20 7612 0600



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**ICO SEMINAR ON ACHIEVING SUSTAINABLE SUPPLY IN THE COFFEE MARKET**  
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**REGISTRATION FORM**  
**FOR PARTICIPANTS ELIGIBLE FOR ONE FREE PLACE**  
**(for each signatory Government / PSCB association / Core Group advisor / Statistics expert)**

**Signatory Governments / PSCB associations / Core Group advisors / Statistics experts (See Annex III)**

Title (Dr/Mr/Mrs/Ms): ..... First Name: ..... Last Name: .....

Name on registration badge: .....

Official position: ..... Organization: .....

Address: .....

Country: ..... Telephone: .....

Fax: ..... Email: .....

Name of delegation (e.g. PSCB association, Signatory Government): .....

I wish to register for the Seminar and am eligible for a free place YES ☐ NO ☐

This registration has been confirmed with the Head of Delegation YES ☐ NO ☐  
(where more than one person is represented)

**Please send the completed form to:**

International Coffee Organization  
22 Berners Street  
London W1T 3DD  
Email: [deschamp@ico.org](mailto:deschamp@ico.org)  
Fax: +44 (0) 20 7612 0630  
Tel: +44 (0) 20 7612 0600