

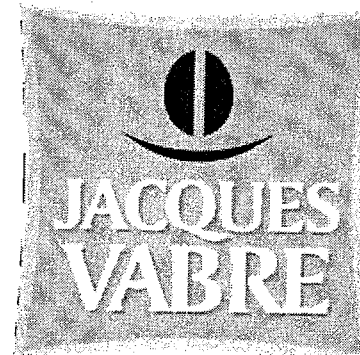


Growing Global Consumer Demand

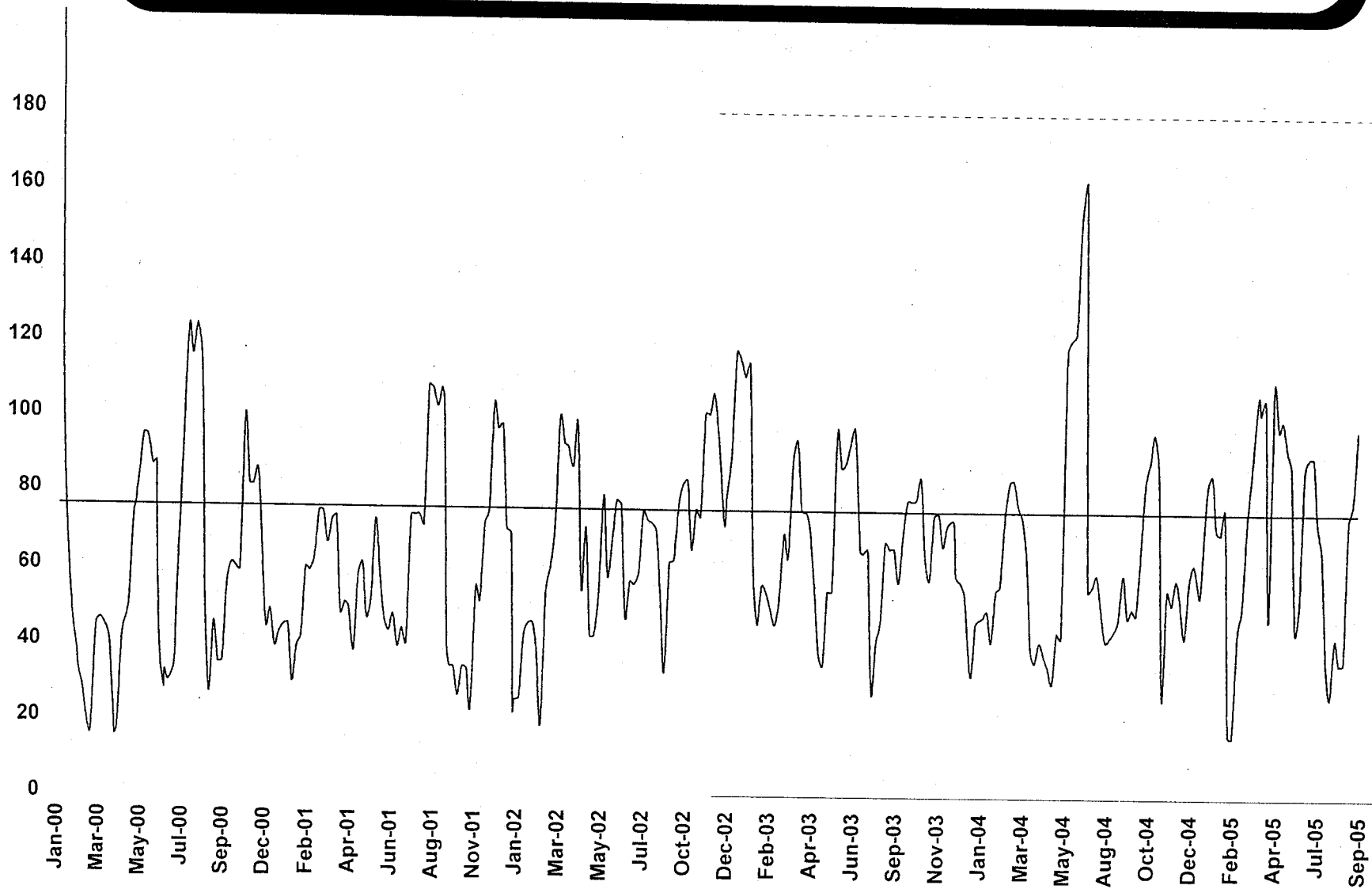
Douglas Burns

Senior Vice President, Global Coffee

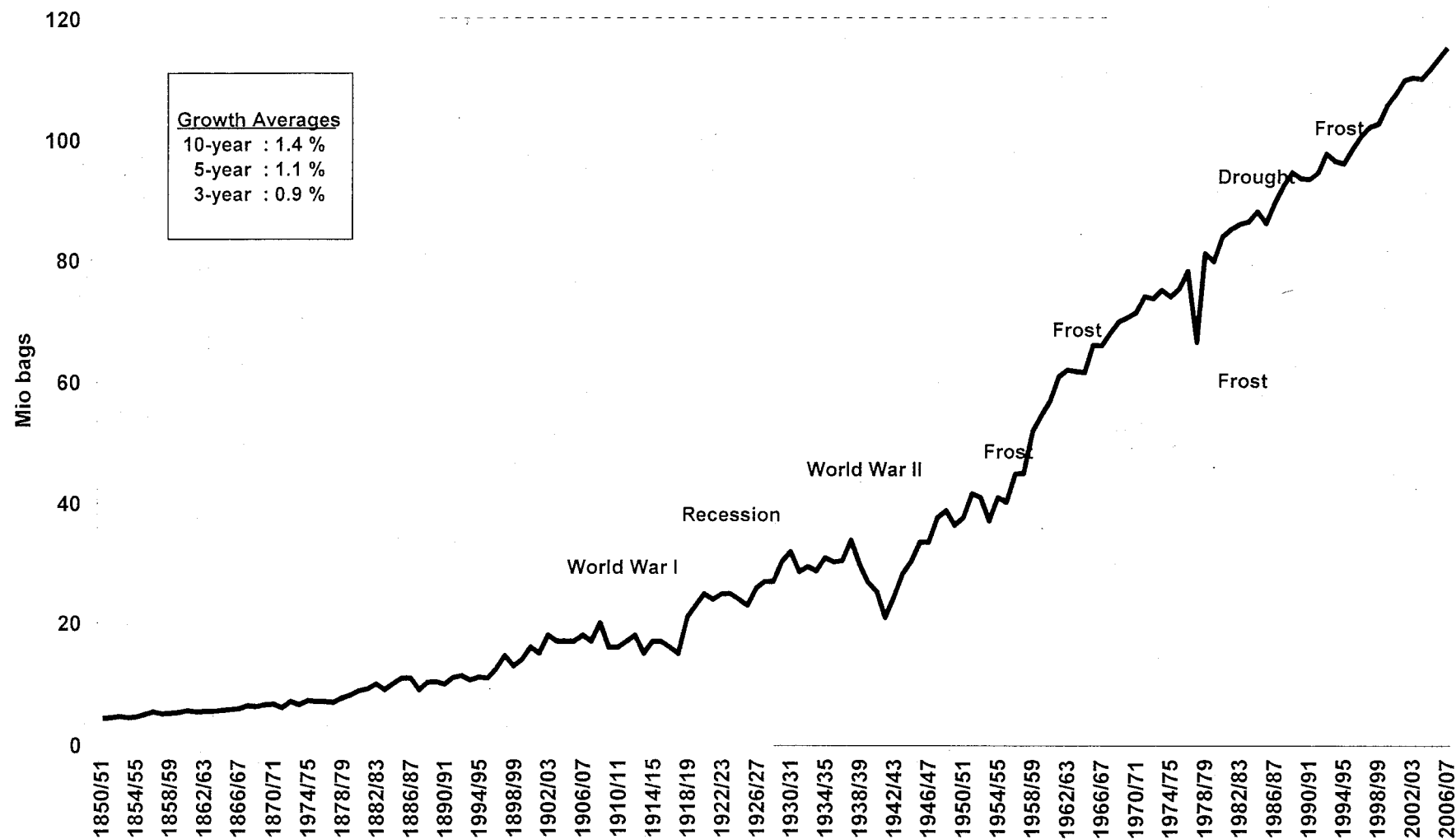
100 Year Commitment To Coffee



Volatility of New York 2nd



World Consumption of Green Coffee



Kraft Growth Recipe



- Excellent quality
- Great advertising
- Constant innovation
- Ready availability

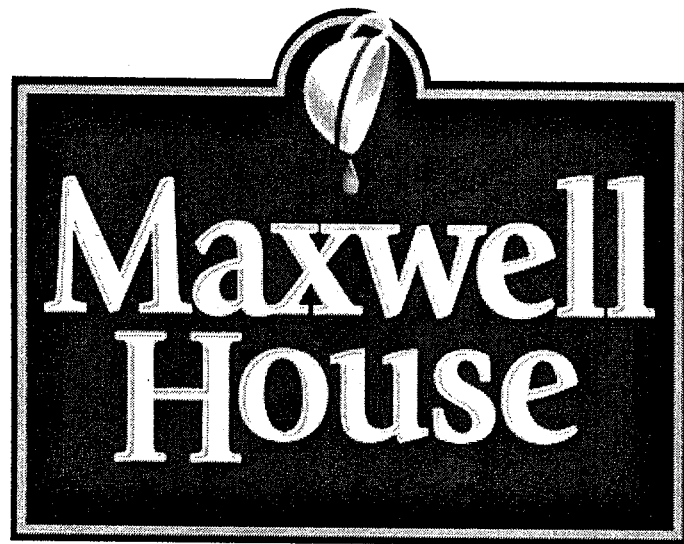


Carte Noire



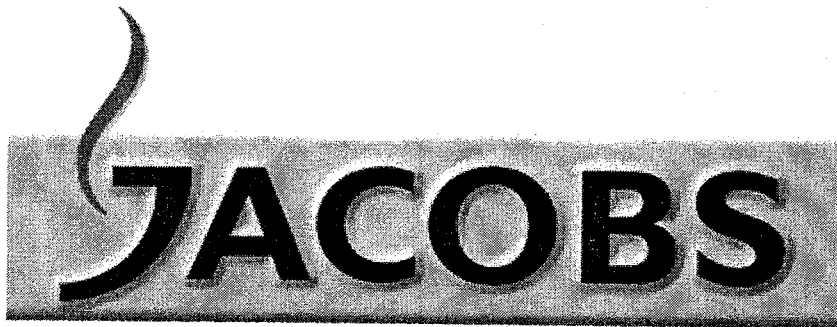
- ▣ France's favourite coffee
- ▣ 25 years of consistently great advertising
- ▣ Premium

Maxwell House



- Global campaign
- Good to the last drop
- Investment in China

Jacobs

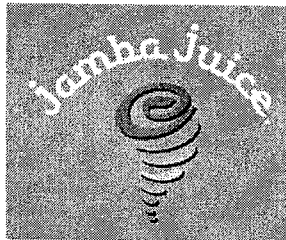


- Authentic quality
- Rapid growth in Russia

Strong Beverage Competition

The Lipton logo, featuring the word "Lipton" in a stylized, bold font inside a dark, rounded rectangular border.The DANONE logo, consisting of the word "DANONE" in a bold, sans-serif font inside a dark, rounded rectangular border.

PEPSICO



- Strong global competitors
- High level of innovation
- Battle for consumer is intense

Filter Pods



- Single cup convenience
- Quality assurance
- Rapid growth in EU

Stickpacks



- Pre mixed convenience
- On the Go flexibility
- Rapid growth in Asia and developing markets



Premium Soluble

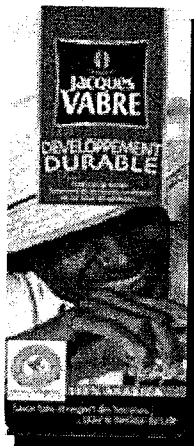


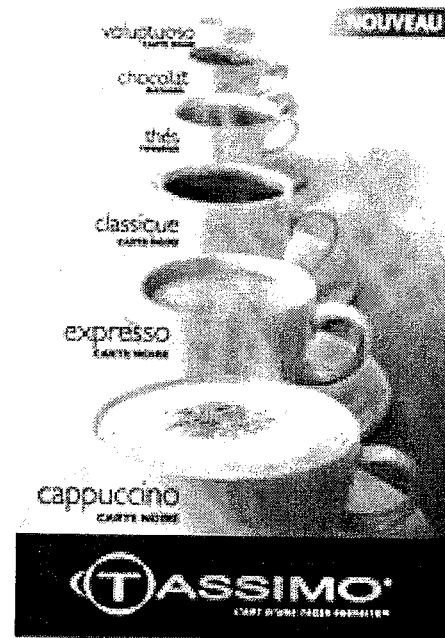
- Higher quality levels
- Coffee pleasure
- Extending into developing markets

Certified Sustainable



- For engaged consumers
- Economic, societal, environmental
- Rollout in EU, NA markets





- Kraft's new on demand system
- Elevates in home quality, choice, convenience
- Rollout in EU, NA markets

Availability Investments

WAL★MART

Ahold



Auchan



- Grocery trade concentration
- Heavy competition for in store space
- Increasing out of home consumption

Commitment to Industry Forums



- **ICO Positively Coffee**
- **ICO Health Care Professionals Communication program**
- **Global, regional, national associations**
- **Common Code and SAI projects**

Summary/Challenges

- **100 year commitment to coffee industry**
- **Focus is on growing global consumer demand**
- **What actions can be taken now to create more sustainable supply side?**
- **Are there opportunities for ICO plus roasters to build on the success of coffee/health pilot schemes?**