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Editorial

According to a preliminary survey by ICO on the repercussions of the recession, while not immune to it, the coffee industry is not being hit particularly hard. In the traditional consumer countries demand showed no signs of dropping significantly in the last quarter of 2008, though there was a tendency to buy cheaper food and household products.

No upheavals are expected in producer countries either, while the impact of the recession remains to be seen in the new markets in eastern Europe and Asia, where living standards are lower and the consumer culture is less solidly rooted. On the supply side, despite the considerable progress in productivity made in recent decades, producers' profits are coming under increased pressure. Costs continue to rise and difficulties in obtaining credit have been sharply accentuated by the recession.

Then there are exchange rates – always an unknown quantity. "Countries such as Brazil and Colombia, whose currencies have gained most against the dollar" the survey states "have not benefited fully from the price recovery which started in 2004."

Now the situation will probably be reversed. In countries with floating exchange rates the recent fall in prices has been counterbalanced by currency fluctuations, while in those whose currencies are tied to varying degrees to the dollar "the impact has directly hit producers".

"This year" the report concludes "will certainly be an unusual one, in which the basic indicators of the world economy offer few grounds for optimism, whereas those in the coffee industry point to steady demand and relative scarcity on the supply side. Whatever the outcome, it is essential that coffee prices reach levels compatible with the investment indispensable for future production."

This issue of CoffeeTrend Magazine will be freely available in thousands of copies at the SCAA 21st Annual Exhibition in Atlanta on April 16th-19th, and at Hotelex Shanghai, scheduled for March 31st to April 3rd. ■

Target 2011

In a few years Brazil will be the world's biggest coffee consumer

Consuming countries

In launching its 1989 quality promotion programme “Selo de Pureza”, ABIC (the Brazilian Coffee Industry Association) presented the nation with a challenge: to bring its sluggish consumption back to the record highs registered in 1965, when per capita consumption reached 4.72 kilos a year. The national campaign to achieve this end was conducted by the renowned Istituto Brasiliano del Caffè (abolished in 1996).

After twenty years the mission may be said to have been accomplished. As shown in **Table 1 (page 8)**, since bottoming out in the mid-1980s (2.27 kg per head in 1985) consumption has grown steadily, reaching 4.51 kg a head (equivalent to 74 litres of coffee) between May 2007 and April 2008 **(see graph page 12)**. Since the 1960s, however, the population of Brazil has more than doubled (from the 80.4 million recorded in 1965 to the 196 million es-

timated for 2008), so domestic demand in the same year was almost 17.5 million bags, compared with 8.1 million in 1965. According to ABIC projections the rate of growth accelerated in the second half of the year, bringing 2008 consumption to an estimated 18.1 million bags – an increase of 5.8% over 2007.

The fast lane

The economic crisis has not dented expectations for the current year. ABIC is aiming for a total of 19 million bags by the end of 2009. The figures are in line with the target of 21 million bags by 2011 which, if achieved, will have Brazil overtaking the United States and leading the world consumption table.

But even if this progression were to slow down, as some sources consider likely, the inevitable would simply be postponed. Overtaking the United States is now just a question of time – by the middle of the next decade Brazil will be the world's biggest consumer, as well as the biggest producer, of coffee.

Temporary drop

The early months of 2008 were marked by a slowdown in growth (3.43% against the 4.5% average recorded in the previous period) which was in line with the

drop recorded in general food expenditure through large-scale retail outlets, attributable to consumer preference for durable goods. But the figures collected in the coffee industry trends survey – carried out since 2003 by ABIC on a pilot group of 30 large Brazilian companies – show a marked recovery in the second half of the year, leading to the above projection of 18.1 million bags.

Improving living standards

This growth is based on Brazil's rising living standards, shown in the expansion of Class C consumers (with incomes of between 726 and 2,011 Reais a month – 245 to 675 Euros), now accounting for more than 42% of the population. An in-

Table 1 - Total and per head consumption

Year	Total consumption		Consumption per head	
	Ground roasted	Including instant	Green coffee	Roasted coffee
1965		8,1	5,91	4,72
1985	6,0	6,4	2,83	2,27
1990		8,2	3,39	2,71
1991		8,5	3,47	2,78
1992		8,9	3,58	2,87
1993		9,1	3,62	2,89
1994		9,3	3,65	2,92
1995		10,1	3,88	3,11
1996	10,6	11,0	4,16	3,33
1997	11,0	11,5	4,30	3,44
1998	11,6	12,2	4,51	3,61
1999	12,2	12,7	4,67	3,73
2000	12,6	13,2	4,76	3,81
2001	13,0	13,6	4,88	3,91
2002	13,3	14,0	4,83	3,86
2003	12,9	13,7	4,65	3,72
2004	14,1	14,9	5,01	4,01
2005	14,6	15,5	5,14	4,11
2006	15,4	16,3	5,34	4,27
2007	16,1	17,1	5,53	4,42
May 07-April 08	16,5	17,5	5,64	4,51

Source: ABIC

crease has also been observed in non-home consumption – from 32 to 36%, and branded coffee-shops have been doing a roaring trade, as witnessed by the opening of big-name outlets, headed by Starbucks.

Increased concentration

Between May 2007 and April 2008 **(see Table 2**) the ten biggest companies belonging to ABIC accounted for 71.01% of total roasted coffee production, compared to the 70.29% recorded over the previous 12 months.

The biggest 50 companies registered an average growth of 6.8%, which rises to 6.89% for those belonging to the pilot group mentioned above. The smallest 100 did not do so well, recording a modest increase of 0.19%.

According to ABIC figures from 2005, just over 60% of coffee producers are concentrated in south-east Brazil, and about a quarter are based in the state of Sao Paulo.

The industry continues to be characterised by a high number of micro-companies. Most of them are family-run, undercapitalised and low-tech, and their profit margins are small. Mergers and takeovers have become increasingly frequent in recent years.

The competitors

The undisputed market leader, with the Café do Ponto, Caboclo, Pilão, União and Seleto brands, is Sara Lee Cafés do Brasil, with a share of over 20% (about 22% two years ago).

At the end of October 2006 the Brazilian division of the American multinational opened its second factory – in Jundiai, near Sao Paulo – at a cost of 90 million Reais (about 30 million Euros), providing a production capacity of about 100,000 tonnes.

Second place is also occupied by a multinational giant – Strauss Food, which entered the Brazilian market just after the turn of the century with the acquisition of Café Três Corações. Following its subsequent merger with Santa Clara Indústria e Comércio de Alimentos, in 2005 the Israeli group set up Santa Clara Participações.

Indústrias Alimentícias Maratá is a division of the Grupo José Augusto Vieira, a conglomerate carrying a lot of weight in food, packaging and tobacco. Proud of its position as the biggest wholly Brazilian-owned roaster, the company has its head office in Itaporanga D'ajuda, in the state of Sergipe.

Melitta do Brasil Indústria e Comércio is part of the big German multinational Melitta Group, which entered the Brazilian market in 1968.

Cia Cacique – Companhia Cacique de Café Solúvel – produces instant coffee in its factory in Londrina, in the heart of the Paraná coffee-growing area, with a production capacity of 70 tonnes a day.

Besides using the traditional Bom Taí brand, Café Damasco, also based in Paranà at Mossunguê (Curitiba), sells coffee in most parts of Brazil under various brand names (Maracanã, Negresco, Pacheco, América, Palheta) it has bought over the last two decades.

Perfil Mitsui Alimentos, with factories in Aracariguama (San Paolo) and Cuiabá (Mato Grosso), belongs to the Mitsui Group, the biggest Japanese conglomerate. Mitsui entered the Brazilian cof-

Table 2 - Production and market shares of ABIC companies (April 2008)

	2007/2008		
Group	**Monatsvolumen (Sack)**	**Marktquote (%)**	**Betriebsanzahl**
1 to 999 bags	66.012	7,32	315
1,000 to 2,999 bags	70.650	7,84	38
3,000 to 9,999 bags	124.608	13,82	24
Over 10,000 bags	640.069	71,01	10
Total	**901.339**	**100**	**387**

Quelle / *Source : ABIC*

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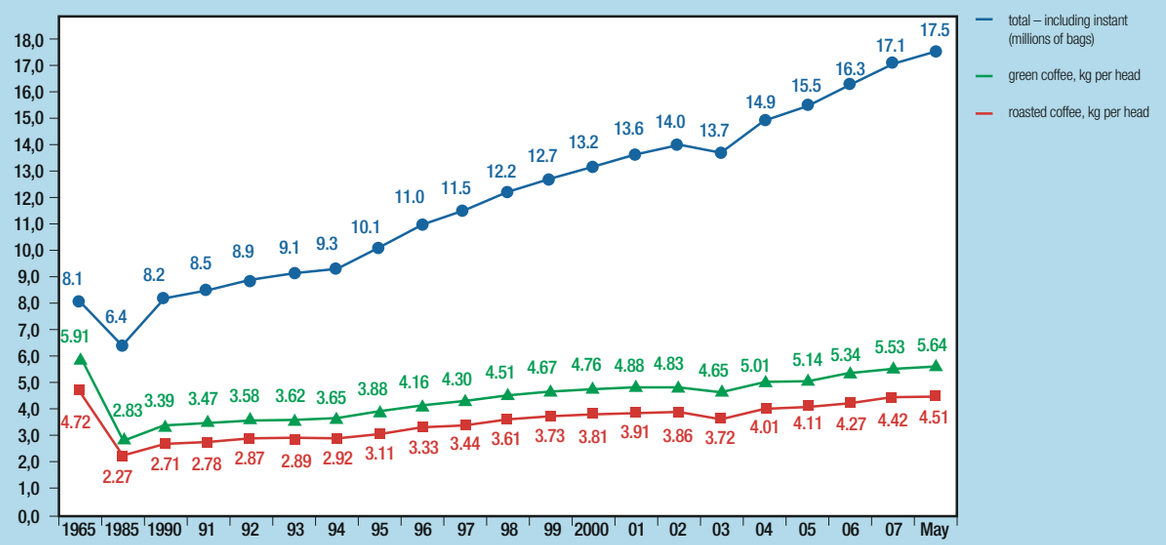
fee market in the 1970s, when it bought Yoshioka & Cia, founded twenty years earlier by a Japanese immigrant family.
Café Bom Dia (using the same brand name as well as Marques de Paiva) is a leading international roaster in the organic and sustainable coffee niche. Owned by the fourth generation of the Marques de Paiva family, the company procures some of its coffee from outside Brazil, using 4,800 certified suppliers in five countries located in three continents. Almost 80% of its production comes from its carbon-neutral factory at Varginha, in Minas Gerais.

The Moka Trading Company is the biggest asset owned by Minas Export Comércio e Exportação. Based at Osasco, Sao Paulo, the company has made considerable investments in recent years to expand beyond its traditional market.
São Braz, based in Cabedelo, in the state of Paraíba, has always had roasting as its core business. But as a result of the diversification policy it has been pursuing over time it now has 117 product lines, most of which are in the food sector.

ABIC confident

In the various speeches he gave towards the end of last year, ABIC executive director Nathan Herszkowicz expressed optimism and confidence that the economic slowdown would not have a significant impact on domestic demand. "I don't think the crisis will have much of an effect on the sales of everyday consumer products such as coffee," he said in a recent interview, confirming the Associations' targets. A more cautious approach has been adopted by the heads of the big coffee companies, who suggest waiting for the results of the first quarter of 2009 before hazarding any predictions. They are mindful of the problems created by rising costs and their increasing inroads into profits. ■

Graph 1 - Coffee consumption trends in Brazil



An evolving market

Results of the 6th Consumer Trends Survey in Brazil

Close up

It warms you up, it wakes you up, it peps you up. And it helps you to socialise, improves your mood and increases your concentration. These are some of the main qualities that Brazilians attribute to coffee, according to the results of the 6th consumer trends survey commissioned by the GGM (Grupo Gestor de Marketing do Café, run by the Ministry of Agriculture). As before, the survey was conducted by InterScience, a leading Brazilian agency controlled by TNS, the world's third biggest market research company, which recently entered the WPP orbit.
Since 2003 the survey has been analysing trends in the world's second biggest consumer market in order to find new niches and opportunities for expansion. In this year's survey the focus is on the middle class, with special attention going to the fast-evolving Class C (incomes between 245 and 675 Euros a month).

Methodology

The survey used a questionnaire on a sample of 2,173 people representing the adult population of all parts of the country. The InterScience experts concentrated their gaze on purchasing and consumption habits, analysed according to a series of parameters and variables of a geographical, social, financial and cultural nature.

Product penetration

The first striking result of the survey is the increasing penetration of coffee on a national scale. Compared with the 2003 figure of 91%, no less than 97% of the population are regular or current coffee-drinkers, with all age groups at 90% or better: the numbers range from 94% in the 15-19 age group (85% in 2003) to 99% (96% in 2003) in the over-36s. More men (98%) drink coffee than do women (96%). In geographical terms the expansion is widespread – only in rural towns has there been a slight contraction.
Historical trends
In the period 2003-2008, coffee penetration increased more in the higher income brackets, moving from 89% to 96% in Class C, from 87% to 96% in Class B (monthly incomes of up to 2,200 Euros)

and from 83% to 99% in Class A. Class D registered a slight decline (from 99% to 98%).

The strength of tradition

Among the reasons for interviewees starting to drink coffee, those related to family habits and traditions still predominate (88% of answers). But increasing inroads are being made by sensorial considerations such as taste and aroma. Compared to 2003, a greater percentage of interviewees expressed an intention to reduce their consumption in the near future. According to InterScience analysts the fact that the reasons most frequently given concerned perceived threats to health (51% of answers compared with 42% in 2003) demonstrates the need to continue and intensify medical and general publicity campaigns highlighting the benefits of coffee.

Pure and inebriating

An interesting feature to emerge from the spontaneous answers given by the interviewees was their perceptions of coffee's main qualities. The average consumer seems to be struck most by its strong and agreeable aroma, especially when the packet is opened (42% of the answers, compared with 25% in 2003). Less frequent were references to the "purity of the product", which was the predominant response six years ago. Preferences vary between intense tastes (22%) and more delicate ones (16%), while fewer people now mention coffee's full-bodied quality and its strength (15%, down from 35%). Brand-names are now more frequently identified with quality than six years ago (12%, compared to 7%).

Varying tastes

Stratifying the responses by income, it may be observed that the better-off look for product purity and subtlety of taste, whereas customers with less purchasing power rely on brand familiarity. Class C consumers produced a variety of responses: they go for the inebriating aroma of the packet or tin when opened (42%), but also quality (37%), intensity of taste (23%) and performance (16%).

Consumer behaviour

Among the factors determining individual consumption, a predominant role is still played by habit (80%) and family tradition (74%). For 51% coffee provides an opportunity for a break. It is often a pleasure to be enjoyed alone (44%), but may also provide a chance to have some company (43%).

In social terms, consumption is more often associated with family occasions (66%) than with meeting friends (45%). An important role is played by hedonistic motivations ("I drink coffee for the simple pleasure of doing it") and sensorial satisfaction ("I like the aroma" - 65%), to which are added those related to the properties

and virtues instrinsic to coffee ("it warms me up", "it makes me feel good", "it gives me energy") and the ritual behaviour it entails.

Brand fidelity

Purchasing choices are influenced most of all by brand fidelity (51%). Also significant, of course, are quality (17%), price (11%), information written on the package (8%) and other value factors (promotions, special offers).

The idea of gourmet coffee is associated most frequently with high quality (8%), gastronomic exclusiveness (4%), the characteristics of the beans (4%) and, to a lesser extent, packaging, flavouring and adherence to the tastes and quality standards of international markets ("product for export").

Familiarity with the idea of sustainability is limited (fully clear to no more than 26% of interviewees), though about half of consumers stated that they would be prepared to pay up to 5% more for coffee produced with environmentally-friendly methods and ensuring better living standards for farmers.

Coffee-making methods

Looking at the types of coffee consumed (a number of answers were available), 93% of interviewees said they used filter coffee (made with textile or paper filters), 14% instant, 13% cappuccino (this category includes instant types) and 11% espresso – increasingly popular, especially in the higher income brackets. Tiny percentages remained for decaffeinated (1%), flavoured (0.5%) and organic (0.5%) coffees. Vacuum packaging registered a 35% increase in popularity at the expense of envelope bags, whose preferences fell sharply.

In terms of times of day, breakfast is typified by filter coffee, indicated by almost

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all the interviewees (98%), and cappuccino (above all instant – 72%). In addition to the morning (67%), instant coffee was stated as a preference for other periods in the day (44% in the afternoon and 33% after dinner), while espresso is preferred after lunch and in the afternoon (30% and 44% respectively).

Frequency

80% of coffee consumers, compared with 76% in 2003, said that they drink it every day. This increase is even greater in the Class C income bracket (from 75% to 81%).

Non-home on the increase

Almost everyone drinks coffee at home (97%), but there was a marked increase in the proportion of interviewees who said that they drink it out (from 17% in 2003 to 37% in 2008). In this case, the preferred varieties are espresso and cappuccino.

Conclusions

In the years covered by the six surveys carried out, coffee consumption has increased in the Brazilian population, mainly among the middle classes and the over-36s. Non-home consumption has expanded substantially – owing partly to the spread of coffee shops – principally to the benefit of espresso and cappuccino. The Brazilian market may thus be said to be mature and open to innovation in terms of products, packaging, types of coffee-making and forms of consumption. ■

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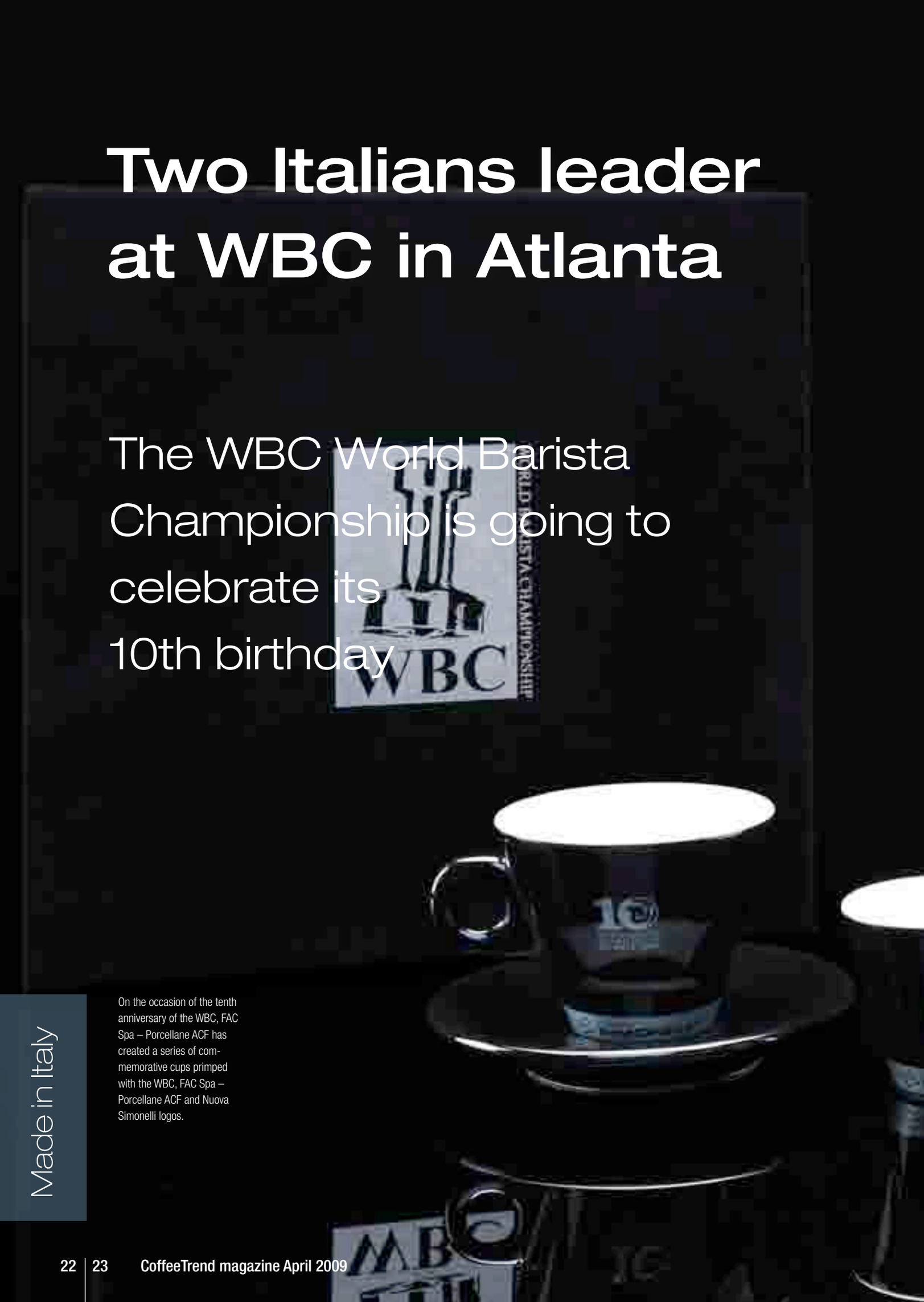
Two Italians leader at WBC in Atlanta

The WBC World Barista Championship is going to celebrate its 10th birthday



On the occasion of the tenth anniversary of the WBC, FAC Spa – Porcellane ACF has created a series of commemorative cups primped with the WBC, FAC Spa – Porcellane ACF and Nuova Simonelli logos.

Made in Italy

The tenth edition of the honorable intercontinental price for baristas, which this year take place in Atlanta, on the USA, from the 16th to the 19th of April 2009, hold the Italian flag thanks to a comarketing operation to sponsor technically the WBC by the side of two historical companies world leaders on this sector (field).
Fac and Nuova Simonelli make avalaible their "formula one" of the professional cups and of the coffee – maker.
"The WCB – says Silvia Canepa, President of FAC Spa / Porcellane ACF – is an important event to promote the preeminence of a strategic sector in italy as that of the bar. Think about two basic products as espresso and cappuccino, real italian products imitated all over the world, but which find their authenticity only in the Italian tradition. In order to reaffirm the Italian quality of the bar products, we began this sponsoship with Nuova Simonelli having in common the devotion to the preeminence and the defence of the Made in Italy".
Our partnership consist from FAC Spa – Porcellane ACF, the supply of the professional cups for the attending baristas, and from Nuova Simonelli the supply of "Aurelia", the official coffee espresso machine of the WBC 2009 – 2011. Aurelia is esteemed from WBC as the best product in the market.
The field of the bar is a complex world

because is not suffice to have the best raw materials and the best preparation to obtain the best espresso coffee. The machine which produces it and the cup in which it is served are integral part of the perfect "coffee experience".
FAC Spa – Porcellane ACF and Nuova Simonelli, counted among the historic companies of the sector, are interested in spreading the fact that the true espresso coffee sprouts in the good plantations but develops only in the excellent espresso machine and finds its right habitat only in the professional cup. The two companies have been choosen for the event of WBC for their care and their business ethics and the excellence of what they produce all aolng. A guarantee for the promotion of the Made in Italy and an international recognition of symbolic and practical high value.
Thanks to this technical sponsorship, Italy has already obtained an honorable place on the podium of the tenth WBC of Atlanta.
For the coffee break to become the most intense and memorable "coffee experience" everyone involved in preparing the espresso at the counter of any bar must work as a team to avoid bad surprises. There are risks everywhere, during both the preparation and the service, which can significantly lower the quality of the coffee offered by the roaster. While the coffee world is fully aware that a barista must be adequately trained, less attention is paid to the cup in which the espresso will be served to the customer. This last step, which is the easiest to slip on, as demonstrated in many situations involving restaurateurs and bar owners who, in good faith or because they are not very well informed, end up serving an excellent espresso in a cup that's totally inadequate for conserving and enhancing its organoleptic properties. All the efforts made by expert cuppers and the most well-trained baristi can be wiped out by this last step. By using an analogy, sais Alberto Canepa managing director Fac Spa – Porcellane Acf we can say that serving a good and well-prepared espresso in an inadequate cup would be like watching a colour film on a black and white TV set: you see the same film and can always understand the plot, but you lose all the pleasure and vividness offered by colour. In the same way, a good espresso served in an inadequate cup loses its main colours, meaning its aroma and consistency.
For this reason, the professional cup that can make the difference in the perfect "coffee experience".
Alberto Canepa the Managing Director manage together with his sister Silvia Canepa Fac Spa - Porcellane Acf, a world leader in the professional cup sector that was founded more than half a century ago in the kilns of Albisola Superiore, one of the ceramic capitals of Italy. Today, about 50% of the company's production is exported to more than 22 countries on 5 continents. It operates with a staff of almost two hundred employees and produces twelve million pieces per year. The company has always promoted the culture of quality coffee, working closely with authoritative roasters and some of the world's leading barware suppliers. In 2008 the company was selected by SCAE to supply the cups for the 5th Scae World Cup Tasting Championship 2008 in Copenhagen. Fac's latest professional cup is the Red cup, renamed the Ferrari of professional cups, with an intense and "cadmium-free" red colour. Over these years important international publications

that specialise in the world of coffee have awarded FAC for its company philosophy that focuses on the constant pursuit of excellence and on promoting the culture of quality coffee.

The managing director of FAC - Porcellane ACF Mr Alberto Canepa and the president Mrs Silvia Canepa are steadily involved in a personal check of the quality of the production

On the strenght of their long international and ten-yearly experience, FAC are preparing to take on the American market, with specific initiatives and a specialorganisation for the purpose certainly score points for us there, in a demanding and dinamic market, able to perceive creativity as a factor of primary importance. Our foreign sales office is geared up to increase shipments to the US, and our productive capacity is able to satisfy the qualitative and quantitative demands of the biggest roasters. We will be setting up special services through which we shall take to the US our own value system, our total dedication to research and quality.We shall be publishing a newsletter containing accurate information, including technical updates, pertaining to the coffee industry. Anybody wishing to receive it can enrol on the mailing list as of now on our website (http:/www.acf.it).
Not only the professional cup has the "right" to be part of the coffee "production chain" but, in most cases, and always for the case involving the Italian espresso, is the last aspect that can make the difference in the perfect "coffee experience".
But what are the features of the perfect cup, meaning the cup designed and produced for just one important reason: "to protect" the espresso against the dangers of the outside world?
We asked to Alberto Canepa that answered so:

The material

The material used determines the temperature, which has a significant effect on the perception of taste. Of fundamental importance are the raw materials used for the pastes: the perfect cup must be made of hard feldspathic porcelain, a material that creates "thermal insulation" and maintains the ideal service temperature (around 65°C). The material enhances the intensity of the aroma and guarantees a balanced taste. Other technical processing details can increase the resistance to thermal shock that the professional cup, by its very nature, is constantly subjected to. Such characteristics are the end result of decades of professional research.

The shape

The professional cup is designed to make it easier to form cream, to concentrate aromas and to regulate the flow of the liquid into the mouth. Even if it is difficult to obtain, an "egg bottom" is indispensable to ensure the consistency of the cream. The cup must be thicker at the bottom to facilitate contact with the lips. The handle and the saucer must be ergonomically designed, satisfying the drinker's need for comfort. Cup capacity must range between 50 and 75 ml to ensure that the aroma has the right "head space". The ideal capacity is 65 ml: the aroma tends to dissipate in a cup that's too big.

The exterior design

The exterior of the cup can have the most sophisticated and luxurious design, pro-

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vided that it meets all technical requirements. Functionality can be guaranteed by an increasingly innovative design that must not neglect the excellent characteristics that have already been developed. If important contributions from R&D technicians are required to perfect the professional cup's interior materials and shapes, the world of art and creativity gets into the act as far as the design and decoration are concerned. The purpose of all design embellishments and developments must be to enhance the value of the espresso while providing an aesthetically satisfying setting.

Service life

In addition to the strength of the material used to make it, the enamelled surface of the professional cup must be just as sturdy, so that even after being washed thousands of times it will still look "like new". Special techniques or "secret recipes" can create colour brightness and intensity that will resist up to 5 thousand washings: a figure that indicates just how strong the professional cup is and must be.

Range

Considered by itself, the range of professional cups may seem to be a neutral feature and not an index of quality. However, such an enormous assortment indicates the extent of the experience and the know-how that must be considered a company strong suit, just like production capacity, personalisation according to customer needs and after-sales service. All are synonymous for roaster satisfaction and a guarantee for the end customer.

Made in Italy

As in many other sectors, for the professional cup the concept of made in Italy, along with the certification, is synonymous for total quality. In order to provide such a guarantee, the cup must be produced in Italy by Italians with Italian materials, techniques and certifications.

Safety

Another very important aspect is cup safety. With the advent of market globalisation, for several years the cup sector has been flooded with products that no longer provide any type of consumer health guarantees. Ultra white porcelain, because of the high lead concentration in the enamel, caused a scandal a few months ago when a famous automotive company made the mistake of offering poisonous cups, in the real sense of the word, as gadgets. By making decisions based only on the low price factor, this buyer, like many others, runs the risk of a scandal and loss of image by using products that do not comply with safety rules and perhaps are supplied with false certifications issued for money by unscrupulous certification institutes.
The professional cup is undergoing a massive attack that puts the extensive efforts made by roasters and restaurateurs/bar owners at risk. The first step toward solving this problem is to choose made in Italy cups, followed by direct knowledge of the manufacturer and an analysis of its know-how, which indicates the degree of reliability offered to consumers. The

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numerous parliamentarian queries along with the research conducted by the ADUC (the Italian Consumer Protection Agency) are generating alarming data about the headway into European markets being made by fake, carcinogenic and toxic products that, in some cases, are deadly for consumers. This is a real emergency that must be dealt with through certifications and the promotion of a culture of quality that, for roasters, will lead, over the medium term, to savings and the enhancement of a company's image with the public.

In Italy, the answer for professional cup manufacturers is provided by the Ministerial Decree of 1st February 2007 that imposed the use of the "conformity declaration" to ensure manufacturer traceability for the purpose of assuming responsibility with regard to customers and end consumers. All this must be considered in relation to the standard concerning the transfer of lead and cadmium in products that come in contact with foods. FAC strictly complies with this conformity declaration, obtaining specific certifications for each type of enamel. Laboratory testing of all products before they are placed on the market may be a second useful means of defence.In her meticulous analysis, as mentioned at the beginning of this article, Sherri Johns invites baristi not to accept low-quality cups, that she calls "bad cups". Being lenient means possible exposure to risks that may be dangerous for consumers and harm the image of roasters as well as restaurateurs/ bar owners, meaning those who have worked hard to produce the best coffee and who may see all their efforts go up in smoke due to a bad cup. The promise of easy and immediate savings may have a boomerang effect and become a legal nightmare, especially if the toxicity of the product is confirmed.

So, from this brief analysis, it can be concluded that the professional cup is not just a functional asset, to be used to improve coffee consumption. It is also an object that can end up making an important contribution to the perfect "coffee experience", a basic tool of an everyday

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action that is transformed into a pleasurable ritual. So, for these reasons we can say that in the world of roasting "the professional cup makes the difference".

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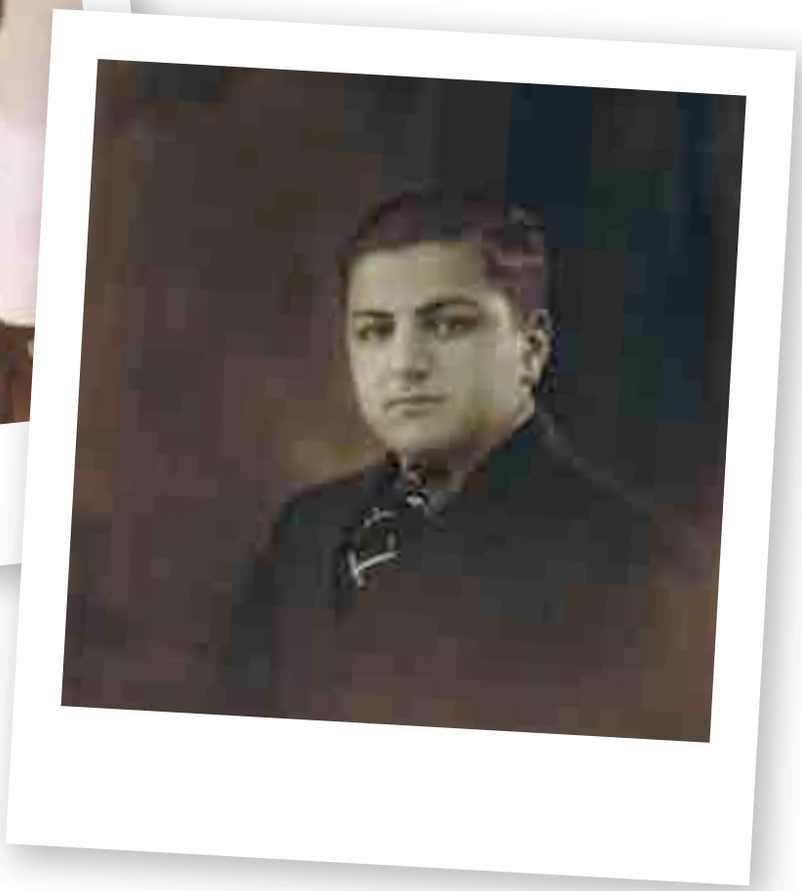
The Passing of A Coffee Legend

In Memoriam
- K. Cyrus Melikian 1920-2008.



K Cyrus Melikian, entrepreneur, industrialist, inventor, mentor and lifetime Philadelphia resident, peacefully passed away on Thanksgiving of 2008 in his home in Haverford PA.

Mr. Melikian was born November 24, 1920 in the Mayfair section of Philadelphia to immigrant parents who fled genocide in Armenia. He graduated from Northeast High School and was working while attending University of Pennsylvania when he was drafted.

In 1946 while serving in the Army Air Force, Cyrus and his buddy Lloyd Rudd invented and designed the first coffee vending machine. After they got out of the service they used Melikian's father's garage to build the first machines and formed Rudd Melikian, Inc.

Cyrus is credited with inventing, creating and /or commercializing coffee vending; Kwik Kafe frozen liquid coffee concentrate; coffee pods; coffee pod packaging machines; the first brewers to use pods; variable strength coffee brewers; coffee bean grinders integrated into a brewer; and Pod Perfect Espresso. Other innovations include the commercial microwave

oven, ice in a soda cup vending machine, six pack soda vendor, and cutting edge use of electronics, etc

After leaving Rudd Melikian, Inc., Cyrus and his sons bought a spin off division from the company and formed Automatic Brewers and Coffee Devices (ABCD) which packages coffee and espresso into pods and distributes Faema espresso machines. He continued to actively work there every day until his passing.

In the world of gastronomy, Andre Simon personally awarded him a charter to start the Philadelphia chapter of the London based International Wine and Food Society. He was invested as Mr. Gourmet in 1977 by the International Society of Bacchus where he served as Vice Chairman for many years. Subsequently, he founded the Society of Bacchus, Philadelphia chapter and served as its Chairman until recently. He initiated the Culinary Institute at Rockland Mansion in Fairmount Park. He established (and taught at) the Flavor-Maker Culinary Chef's Training School for a decade. He was inthronized into the Confrerie des Chevaliers du Tastevin and Commanderie de Bordeaux.

He co-wrote the book "The Wonder of Food" and an illustrated syndicated weekly feature called "Gourmania Guide" which presented the history, how to cook and serve unique dishes and what wine to serve with them.

He had a generous spirit and an insatiable passion for learning, mentoring and developing ideas. His favorite saying was from George Bernard Shaw:

"You see things and say "why?" But I dream things that never were and say "why not?". Cyrus dared to dream, he often stated that pods were just the start for ABCD, and the best was yet to come.

At ABCD, we have pledged ourselves to live up to Cyrus's ideals and his vision. We will continue to innovate, create, and dream of better ways to serve our customers and our community. Truly, the best IS yet to come.

All of us at ABCD and the Melikian Family thank all of Cyrus' friends and colleagues for their generous outpouring of sentiments and donations to the Scholarship Fund started in his name at the Armenian Students Association in Providence, R.I. ■

Robert Melikian

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The ups and downs of a crisis year

The global recession has not spared the coffee industry

About a year ago coffee prices on the London and New York markets, in line with commodity prices in general, were at their highest for over a decade. On March 3rd ICE Futures US (short-expiry contracts) reached a peak of 165.40 cents a pound. On the same date the LIFFE price (also short expiry) closed at $2,732 a tonne, climbing one cent higher ten days later. The monthly average of the ICO compound Indicator touched 138.82 and 136.17 cents a pound in February and March respectively. Similar values had not been recorded since the second half of 1997.

A drop was recorded in April and May, but the market turned up again in June. As oil prices hit record highs, the Indicator stayed above the threshold of 130 cents a pound for the whole summer.

As autumn approached the signs of crisis began to cause deep concern and

the entire world looked at the looming spectre of the worst economic recession since the war. The collapse in commodity prices took coffee with it, and it came right at the turn of the coffee year. From the September average of 126.69 cents a pound, the price fell to 108.31 cents in October, continuing to slip to the December figure of 103.07 cents a pound, the lowest for 18 months.

Prices recovered somewhat in January, rising to 108.39 cents a pound, and fell slightly in February to take the Indicator to 107.60 cents, which was almost the same as the average price for 2007 (107.68 cents a pound).

The wrap

All things considered, for coffee the downturn has been much less painful than for other raw materials. In 2008, the year in which the CRB-Reuters index has recorded the worst collapse (-36%) in its five-decade history, coffee was one of the commodities with the smallest losses (just 18%). To be sure, some other soft commodities, such as sugar (+9.1%) and above all cocoa (+31%), fared much better, but it should be remembered that both these products enjoy special market conditions which support their prices.

Returning to the ICO Indicator, the annual average was actually the highest for more than ten years: 124.25 cents a pound compared with 107.68 in 2007 and 95.75 in 2006. A higher value had not been recorded since 1997 (133.91 cents a pound). In terms of coffee years, the 2007-8 average **(see table 1 page 40)** was almost as high as that of 1996-7 (126.94 cents a pound), with an increase of 21.52% over 2006-7. The biggest boost came from the indicators for Robusta (+28.56%) and LIFFE (+31.55%).

Production

According to ICO, worldwide production in 2007-8 totalled 116.2 million bags, an 8.4% drop compared with the 126.8 million of the previous year.

Mexico and Central America was the only area to record an increase, with 18.3 million bags compared to 16.9 million in 2006-7, and a share of the total which grew from 13.4% to 15.7%. A slight fall was registered in Africa, which produced 14.6 million bags against 15.2 million in the previous year, but it increased its share of total production from 12% to 12.6%.

The losses recorded by the three biggest exporters in the region – Vietnam (-14.9%), Indonesia (-4.2%) and India (-18.3%) – contributed to a production decrease of 11.8% in Asia and Oceania, down to 29.6 million bags, which is 25.5% of global production (26.5% in 2006-7).

Negative cyclical conditions in Brazil and Peru were largely responsible for the substantial contraction registered in South America, from 61.1 million bags two years ago to last year's 53.7, accounting for 46.2% of world production (48.2% in 2006-7).

Types of coffee

Looking now at **Table 2 (see page 40)**, providing a summary of world production in the last four years, the most stable coffee type is Colombian Milds, which fluctuated very little over the period in question. Other Milds increased from just over 25 million bags in 2004-5 to almost 27 in 2006-7, regressing slightly last year. The biggest fluctuations were recorded by Brazilian Naturals, a result of the two-year cycle to which the world's primary producer is known to be subject. The variations observed in Robustas depend mostly on production trends in Vietnam, where production this year, following last year's drop (44.906 million bags), is estimated at 48.875 million bags.

In percentage terms, with all their ups and downs Colombian Milds retained a share of over 11.5%, Other Milds partly recovered to pass the threshold of 23% (though remaining well below the 28.5% recorded in 1999-2000 and the 25.3% in 2001-2), Robustas consolidated

Table 1 - ICO indicator and futures market prices (coffee year averages)

Coffee year	ICO composite	Colombian Milds	Other Milds	Brazilian Naturals	Robustas	New* York	London*
1995/96	106.39	130.23	121.66	123.92	91.10	112.45	83.01
1996/97	126.94	188.05	177.38	153.55	76.50	151.95	71.75
1997/98	115.23	155.61	148.72	137.15	81.72	136.38	76.00
1998/99	88.53	115.61	104.85	88.97	72.21	105.32	68.58
1999/00	72.86	112.66	96.88	86.61	48.83	103.81	46.63
2000/01	47.84	77.05	65.81	57.53	29.88	66.24	27.27
2001/02	45.46	63.74	59.21	43.72	26.85	52.36	21.83
2002/03	52.17	65.89	64.89	48.94	37.23	65.89	34.56
2003/04	57.77	74.41	73.51	62.07	36.37	73.24	33.16
2004/05	85.30	112.29	111.22	98.22	46.05	108.03	42.72
2005/06	91.44	113.04	110.84	100.86	61.45	108.17	54.61
2006/07	104.24	122.08	120.08	108.35	82.73	118.70	74.71
2007/08	126.67	145.79	142.98	130.44	106.36	140.37	98.28
% change							
2007/08 & 2006/07	21.52	19.42	19.07	20.39	28.56	18.26	31.55

In US cents per lb
*Average of 2nd and 3rd positions

their position and Brazilian Naturals lost ground, reflecting the conditions of the two-year cycle mentioned above.

Exports

The above statistics are reflected in the analysis of exports **(see table 3 page 42)**, which fell by about 3%. The decreases suffered by Brazilian Naturals and Robustas corresponded to the modest gains recorded by Colombian Milds and Other Milds.

The summary of figures over the past four years **(see table 4 page 44)** shows that a modest increase in volume of 5.83% (from 90.09 to 96.34 million bags) corresponded to an increase in value of 68.9%, bringing total turnover to $15.22 billion in 2007-8. In nominal terms this is the best result ever, higher than the previous record of $14.3 billion, though that was achieved as long ago as 1985-6.

Stocks

At the beginning of 2007-8 stocks in exporter countries totalled about 25.3 million bags. In the last year they have gone down substantially – preliminary figures for 2008-9 put them at an all-time low of just over 17 million bags. At the end of last September the volume of stocks in importer countries was estimated at 22.3 million bags, a slight drop from the 22.7 million recorded a year earlier.

Table 2 - Total production by group (crop years 2004/05 to 2007/08)

	2004/05	2005/06	2006/07	2007/08	% change 2007/08 & 2006/07
TOTAL	**115,558**	**109,630**	**126,820**	**116,212**	**-8.36**
Colombian Milds	13,325	13,487	13,488	13,685	1.46
Other Milds	25,020	25,206	26,974	26,843	-0.48
Brazilian Naturals	37,463	28,829	38,476	30,778	-20.01
Robustas	39,750	42,107	47,882	44,906	-6.22
Arabicas	75,808	67,523	78,938	71,307	-9.67
Robustas	39,750	42,107	47,882	44,906	-6.22
TOTAL	**100.00%**	**100.00%**	**100.00%**	**100.00%**	
Colombian Milds	11.53%	12.30%	10.64%	11.78%	
Other Milds	21.65%	22.99%	21.27%	23.10%	
Brazilian Naturals	32.42%	26.30%	30.34%	26.48%	
Robustas	34.40%	38.41%	37.76%	38.64%	
Arabicas	65.60%	61.59%	62.24%	61.36%	
Robustas	34.40%	38.41%	37.76%	38.64%	

In thousand bags

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Table 3 - Total exports

Coffee years	2006/07	2007/08	% change
TOTAL	**98.21**	**95.34**	**-2.92**
Colombian Milds	12.51	12.71	1.54
Other Milds	21.37	22.06	3.23
Brazilian Naturals	29.73	27.47	-7.63
Robustas	34.59	33.11	-4.29
Arabicas	63.62	62.23	-2.18
Robustas	34.59	33.11	-4.29

In million bags

Consumption

Consumption in the calendar year 2007 has been calculated by ICO at 125 million bags, an increase of about 3% over the 121.4 million registered in 2006. The 2008 figure is provisionally estimated to be 128 million bags. Producer countries have been particularly dynamic, with Brazil accounting for the lion's share as usual (17.1 million bags), followed by Mexico (2.2 million), Indonesia (2 million), Ethiopia (1.8 million), Colombia (1.4) and India (1.4).

What prospects?

The most recent figures published in the monthly ICO releases **(see table 5 page 45)** estimate production in the current coffee year at a record level of 133.385 million bags, an increase of 14.77% over 2007-8. Production has risen in all producer regions.

Africa's production is put at 17.634 million bags, an increase of 20.65%, and South America's at 64.075 million, a rise of 19.29%. Asia and Oceania are estimated to have produced 33.376 million bags (+12.66%).

Though modest (+0.17%), growth will also be registered by Mexico and Central America, whose crop should total 18.301 million bags.

The uncertainty caused by the recession and the heavy sales made by a number of big financial operators in the futures markets (including soft commodities) continue to push prices down, but the foundations remain solid and demand for coffee is not considered by analysts to be seriously threatened by the general contraction in consumption.

Quality

Although they are given little media attention, interesting figures have been published by ICO regarding its Coffee Quality-Improvement Programme, launched in October 2002 with Resolution 407 and given sharper definition by Resolution 420, which laid down its essentially voluntary nature. In 2007-8 over 91% of exported Arabica was in compliance with the Programme's standards. By contrast, only 25% of exported Ro-

Table 4 - Volume and value of exports

Coffee years	2004/05	2005/06	2006/07	2007/08 1/
Colombian Milds				
- Volume	12.19	11.88	12.51	12.71
- Value	1.72	1.80	2.02	2.43
Other Milds				
- Volume	19.32	20.49	21.37	22.06
- Value	2.53	2.87	3.20	3.89
Brazilian Naturals				
- Volume	27.95	26.68	29.73	27.47
- Value	3.04	3.29	4.02	4.47
Robustas				
- Volume	30.62	29.20	34.59	33.11
- Value	1.72	2.12	3.24	4.43
Total				
- Volume	90.09	88.25	98.21	95.34
- Value	9.01	10.08	12.48	15.22

Volume in million bags - value in billion US$
1/ Estimated

bustas met the required parameters. Last year however, Vietnam, the main culprit for this imbalance, announced the gradual implementation of measures designed to solve the problem by applying the TCVN 4193-2005 standard.

International agreement

To finish with, an update on the ratification process of the new International Coffee Agreement (ICA 2007). By the end of September 2008 the agreement had been signed by 33 governments. Four exporter member states (Ecuador, India, Kenya and Vietnam) and two importer member states (the EU and the USA) had also ratified, accepted or approved it. Since then they have been joined by another six countries (Ivory Coast, Cuba, El Salvador, Gabon, Indonesia and East Timor). For the agreement to enter into force it has to be ratified by a number of governments representing at least two-thirds of the votes of exporter and importer member states (Article 42). Since only the latter states have thus far managed to meet that condition – on the strength of ratification by the EU and the US (which together account for 89.8% of the votes of importer member states) – the 101st session of the Council (22nd-26th September 2008) approved the extension to 25th September 2009 of the deadline for signing up (Resolution 439) and for submission of the documents of ratification, acceptance or approval (Resolution 440). In addition, Resolution 438 established the extension of the previous agreement (ICA 2001) for a further year. ■

Table 5 - Production in selected exporting countries

Crop year commencing	2005	2006	2007	2008	% change 2008&2007
TOTAL	**109,630**	**126,820**	**116,224**	**133,385**	**14.77**
Africa	**13,044**	**15,233**	**14,616**	**17,634**	**20.65**
Cameroon	849	836	602	800	32.92
Côte d'Ivoire	1,962	2,847	2,150	2,500	16.30
Ethiopia	4,003	4,636	4,906	6,133	25.02
Kenya	660	826	652	950	45.68
Tanzania	804	822	810	917	13.20
Uganda	2,159	2,700	3,250	3,500	7.69
Others	2,607	2,565	2,247	2,834	26.12
Arabicas	6,556	7,415	7,388	9,626	30.29
Robustas	6,488	7,818	7,228	8,008	10.79
Asia&Oceania	**29,715**	**33,581**	**29,626**	**33,376**	**12.66**
India	4,396	5,079	4,148	4,883	17.72
Indonesia	8,659	6,650	6,371	5 833	-8.45
Papua New	1,268	807	968	850	-12.16
Thailand	999	766	653	825	26.26
Vietnam	13,542	19,340	16,467	19 500	18.42
Others	851	939	1,019	1 485	45.74
Arabicas	3,893	3,460	3,318	3 520	6.07
Robustas	25,821	30,121	26,308	29 856	13.49
Mexico & Central America	**17,118**	**16,936**	**18,270**	**18 301**	**0.17**
Costa Rica	1,778	1,580	1,784	1 822	2.12
El Salvador	1,502	1,371	1,626	1 448	-10.96
Guatemala	3,676	3,950	4,100	3 900	-4.87
Honduras	3,204	3,461	3,842	3 833	-0.22
Mexico	4,225	4,200	4,150	4 500	8.42
Nicaragua	1,718	1,300	1,700	1 600	-5.88
Others	1,016	1,073	1,068	1 198	12.15
Arabicas	16,982	16,801	18,146	18 157	0.06
Robustas	136	135	124	144	15.99
South America	**49,753**	**61,071**	**53,711**	**64 075**	**19.29**
Brazil	32,944	42,512	36,070	45 992	27.51
Colombia	12,329	12,153	12,515	12 300	-1.71
Ecuador	1,120	1,167	1,110	640	-42.36
Peru	2,419	4,249	2,953	4 102	38.91
Others	941	990	1,063	1 041	-2.09
Arabicas	40,091	51,262	42,457	53 208	25.32
Robustas	9,662	9,808	11,255	10 867	-3.44
TOTAL	**109,630**	**126,820**	**116,224**	**133 385**	**14.77**
Colombian Milds	13,487	13,488	13,685	13 837	1.11
Other Milds	25,206	26,974	26,845	29 004	8.04
Brazilian Naturals	28,829	38,476	30,779	41 669	35.38
Robustas	42,107	47,882	44,915	48 875	8.82
Arabicas	67,523	78,938	71,309	84 510	18.51
Robustas	42 107	47,882	44,915	48 875	8.82
TOTAL	**100,00**	**100,00**	**100,00**	**100,00**	
Colombian Milds	12,30	10,64	11,77	10,37	
Other Milds	22,99	21,27	23,10	21,74	
Brazilian Naturals	26,30	30,34	26,48	31,24	
Robustas	38,41	37,76	38,65	36,64	
Arabicas	61,59	62,24	61,35	63,36	
Robustas	38,41	37,76	38,65	36,64	

In thousand bags

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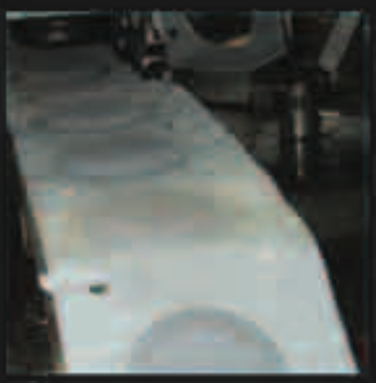

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ALL PODS ARE NOT CREATED EQUAL!

Our founder, K. Cyrus Melikian, invented pods right here in the USA in 1959! He and his partner pioneered and commercialized the automatic coffee vending machine industry after WWII. Pod coffee brewing technology was the ideal way to deliver the first fresh brew on-demand.

ABCD's equipment has been time tested, producing virtually billions of pods over the decades.

However, ABCD has not been satisfied and is constantly improving its technology with other firsts - 14 gram double shot portion pods, proprietary rotary die cut with tabs, nitrogen flush, easy access dispenser cartons, etc. ABCD's TMM pod packing machine can produce 3600 pods per hour of continuous perforated pods on tape, ready to bag. Today ABCD co-packs various size and weights to match any requirements, in both hard pack and soft pack.

We also take grinding very seriously. Espresso must be ground to a consistency of 28,000 particles per gram. Plate/burr grinders overheat causing inconsistent grind and brew results. Using the expertise of the grinder experts at Modern Process Equipment, ABCD uses a 3-stage MPE 888 granulizer (5000 lb per hour capacity) equipped with a normalizer to maintain consistent grind particle size and equalize bulk density differentials.

At ABCD, we are pod people - we are not roasters so we don't compete with our customers. Our customers think of us as their off site Pod Packaging department. Since 1981 we have been conveniently located in suburban Philadelphia.

ABCD

AUTOMATIC BREWERS AND COFFEE DEVICES, INC.
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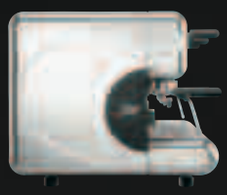
19428 USA

610.828.6000 • 800.939.1776 • www.abcd-pods.com

La San Marco. Wherever you go.

Espresso coffee machines everywhere in the world



La San Marco espresso coffee machines. Since 1920 the leader of quality, reliability and Italian design.

Lines 105, 95, 85 and 80: more and more coffee shops in the world, where coffee quality is a must, choose the innovative technology of a great tradition.

Today, like yesterday, a La San Marco coffee machine is the guarantee of the best espresso coffee. Wherever you go.

La San Marco

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