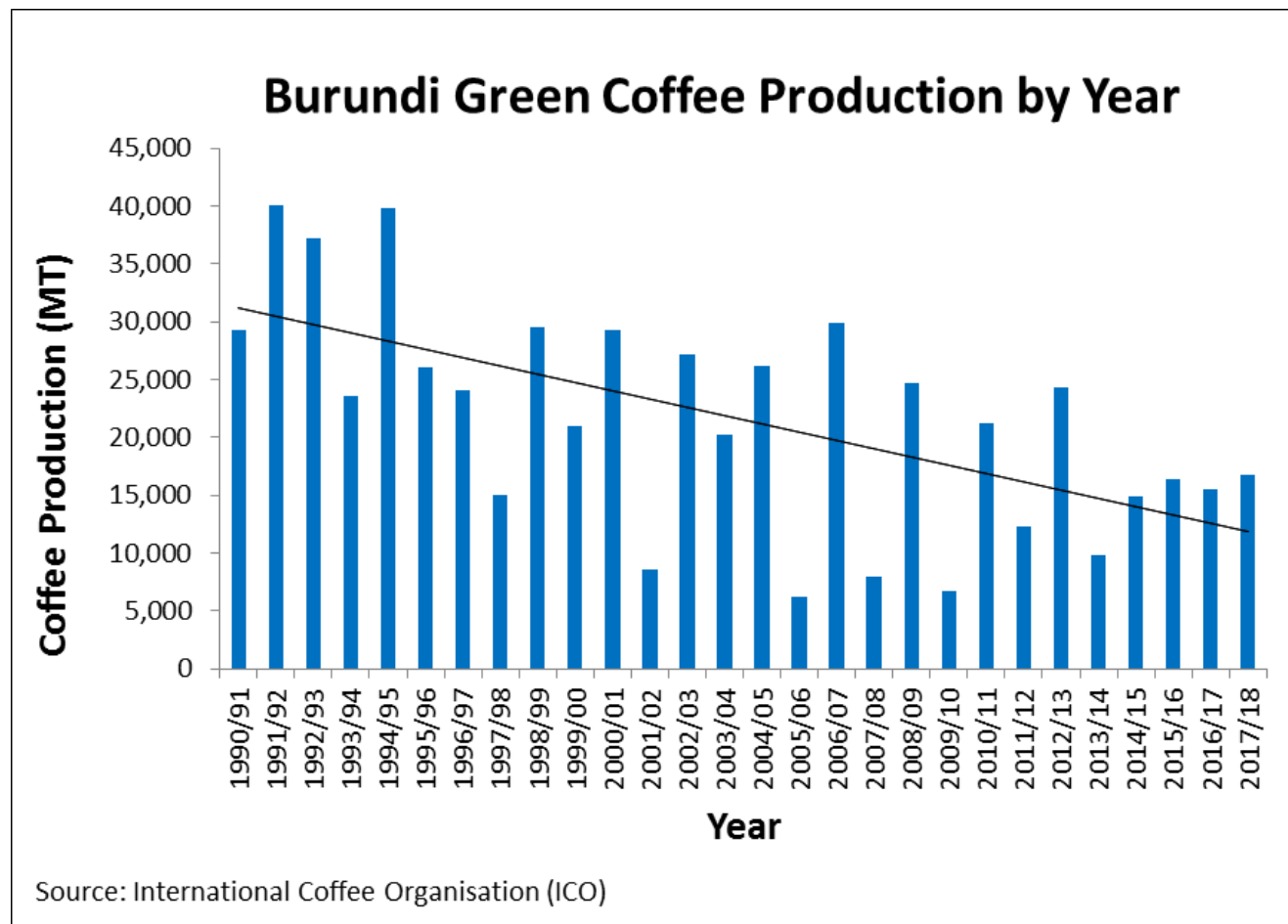


# Réunion de fin de mission avec des acteurs du secteur du café au Burundi

MINAGRIE, Bujumbura, Burundi

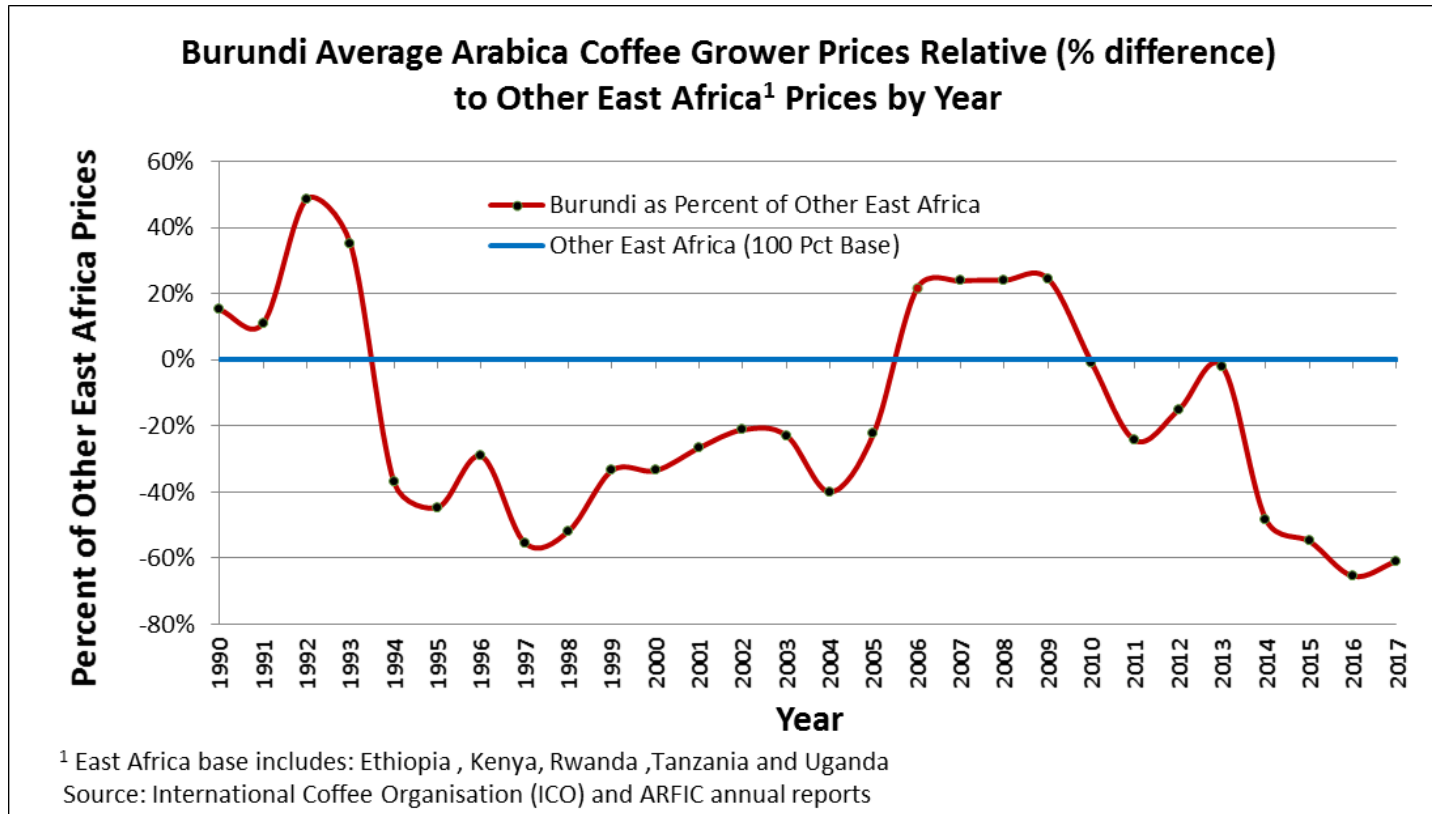
19 Mars 2018

# Long-Term Trends in Burundi Coffee Production



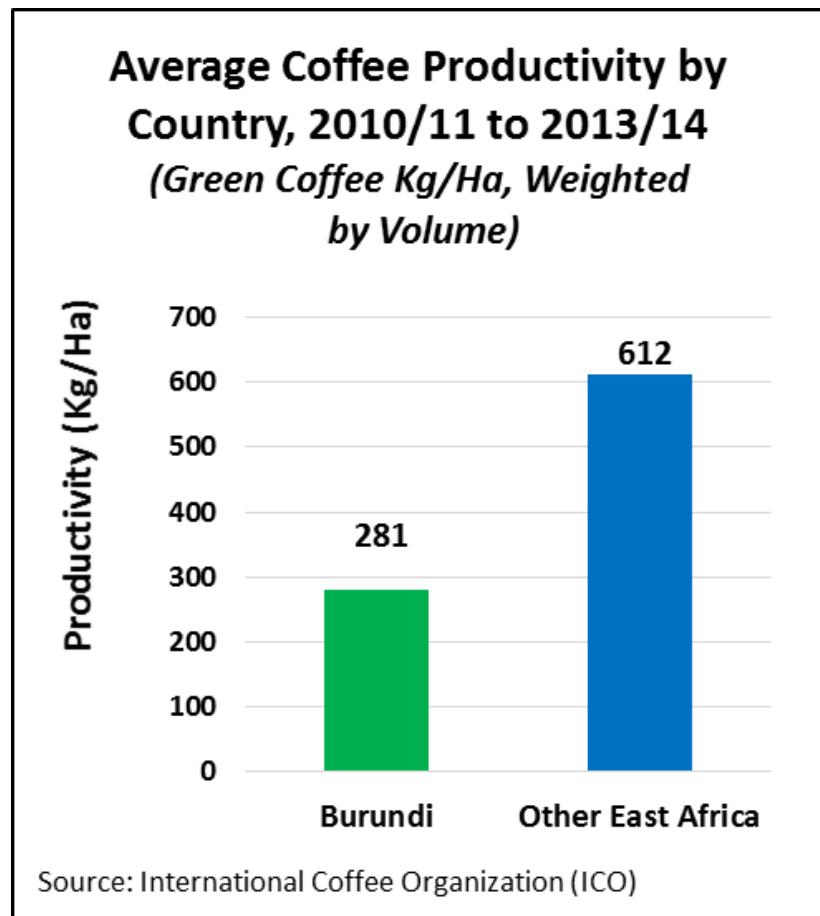
- Burundi coffee production has reduced over the last 25 years and is now less than half what it was in 1990
- At the same time, the number of washing stations has increased from 133 in 1990 to double that number today

# How do the coffee grower prices compare to the other countries in the East Africa region?



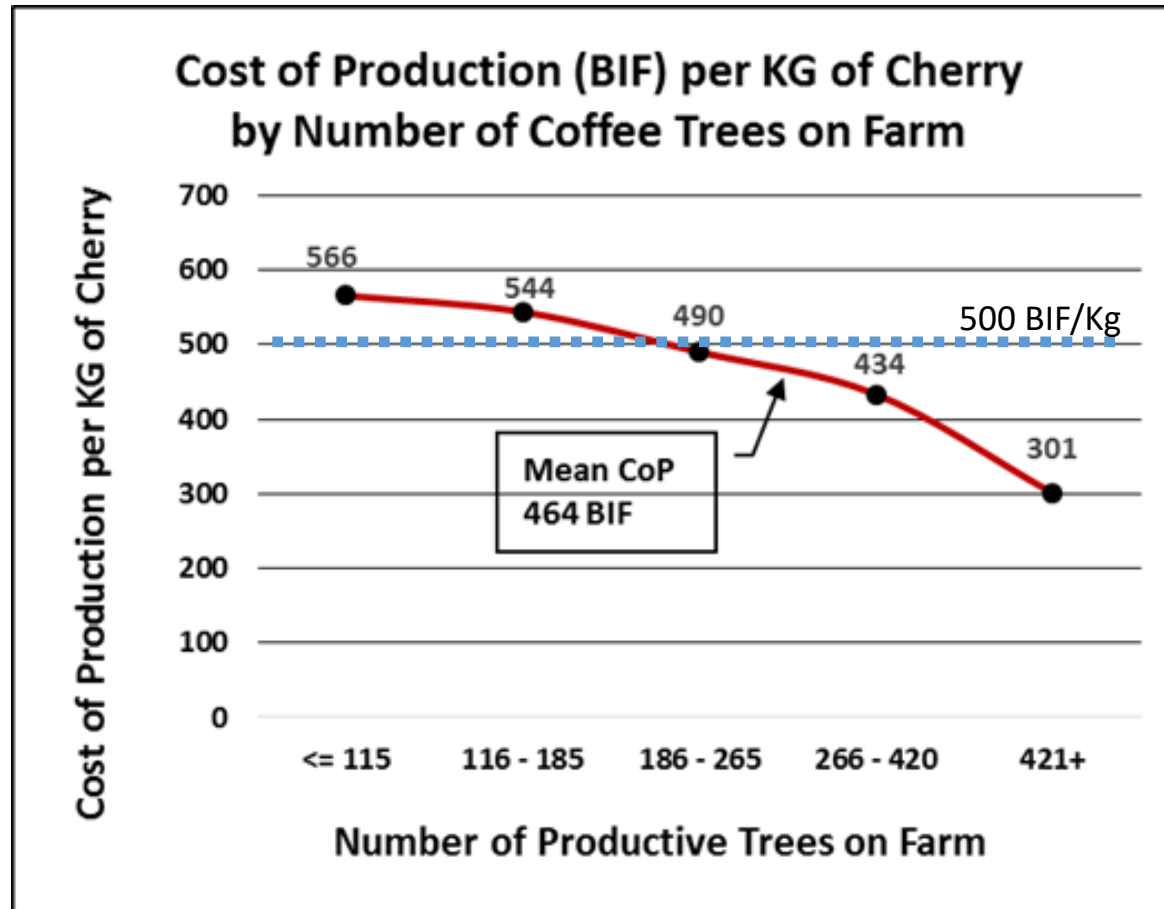
- The coffee grower prices in Burundi are less than the prices in other East African countries by an average of 17.3% for the previous 27 years, and by an average of 46.3% for the previous 5 years

# How does the coffee productivity compare to the other countries in the region?



- The average coffee productivity in Burundi is far behind the productivity for the other East African countries, with a productivity of 281 kg/ha compared to more than double that (612 kg/ha) for the rest of the region

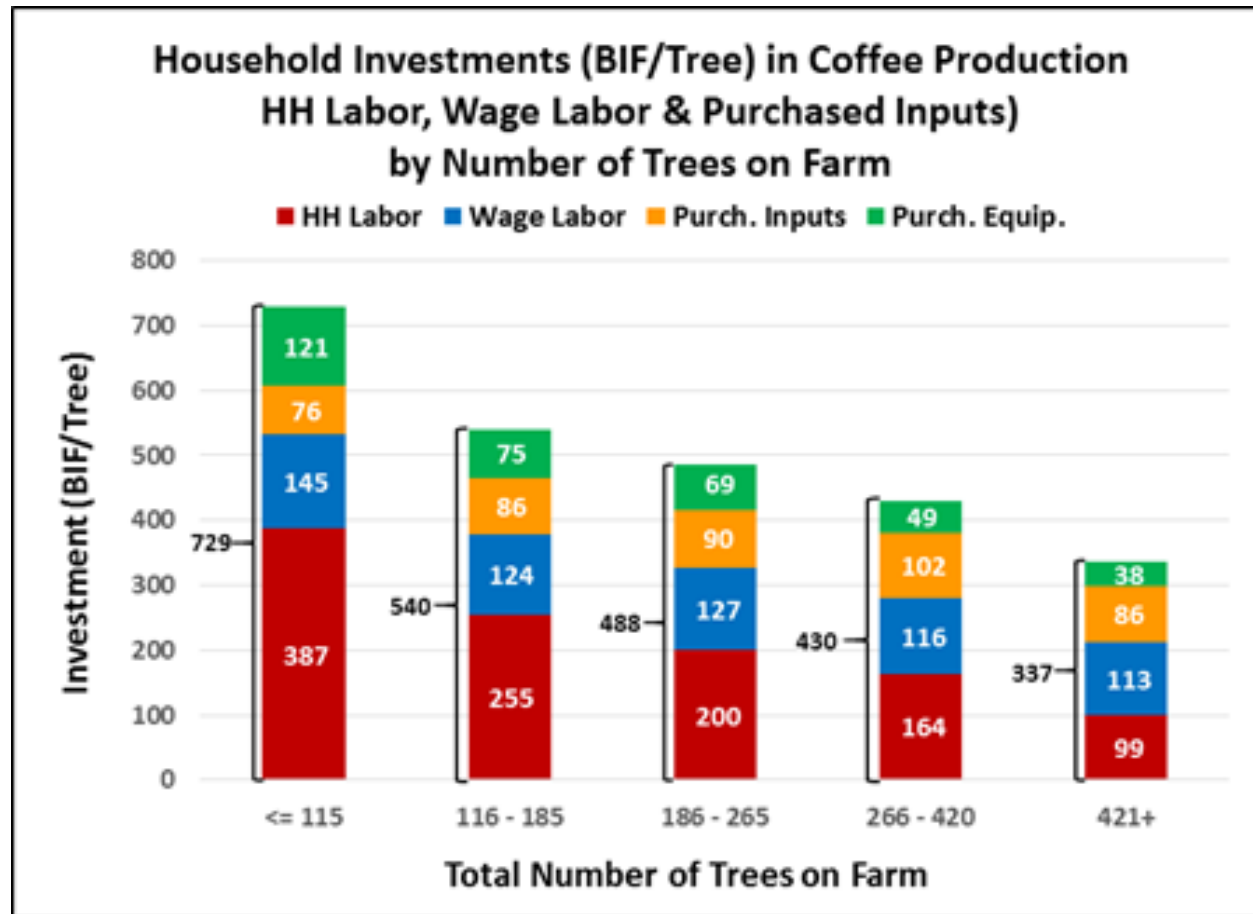
# Coût de production paysan au Burundi en BIF/Kg



Source: Enquête d'AGLC Burundi sur les producteurs de café 2015-16 sur 1 024 producteurs de café à Kayanza, Ngozi, Karusi et Gitega.

- Le coût de production des caféiculteurs en 2015 était en moyenne de 464 BIF par kg de cerise
- Le coût de production est calculé comme la somme de toutes les principales catégories de coûts supportées par les producteurs, y compris:
  - Main-d'œuvre des membres du ménage pour toutes les tâches de production
  - Main-d'œuvre rémunérés pour toutes les tâches de production
  - Intrants achetés
  - L'équipement (p. ex. sacs, sécateurs...)
- C-d-P diminue avec la taille de la plantation de café

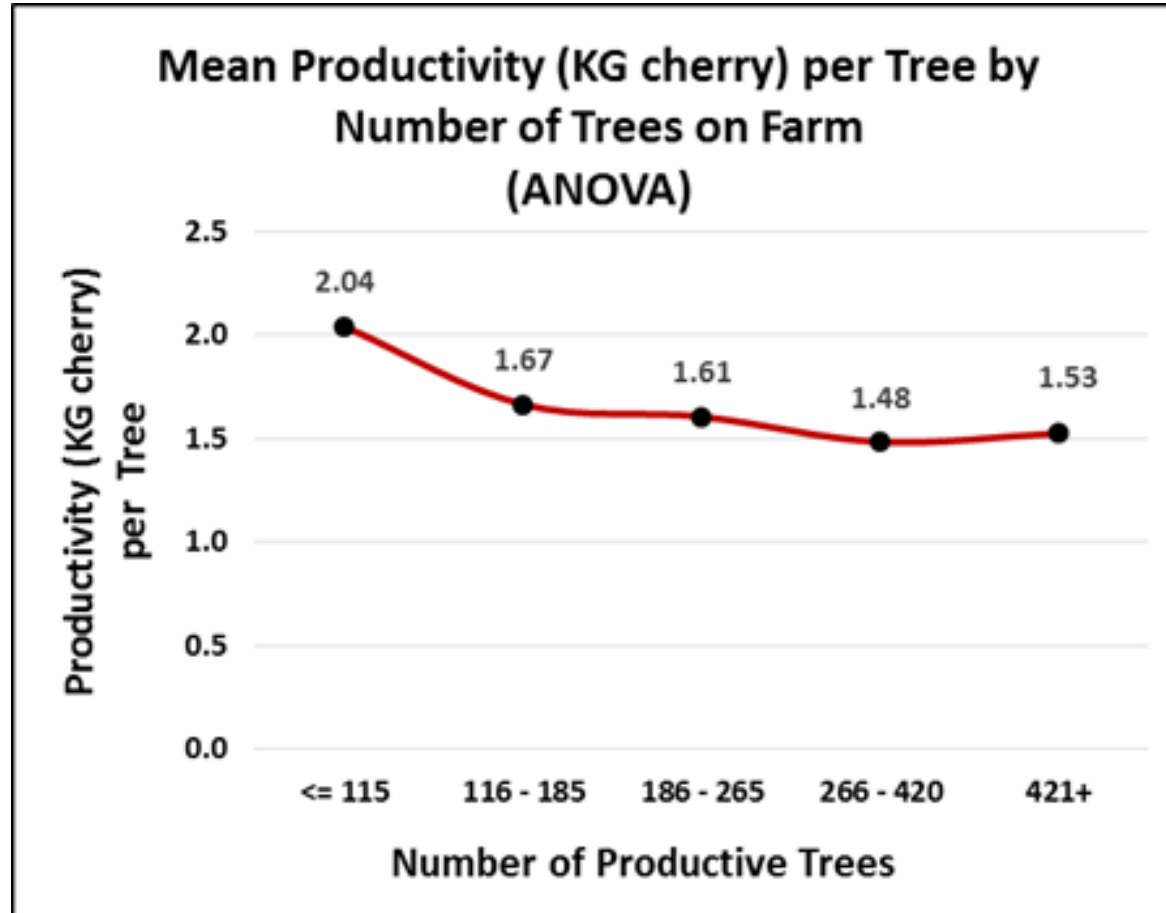
# How do the coffee producers invest in their coffee farms?



Source: Enquête d'AGLC Burundi sur les producteurs de café 2015-16

- The investments by coffee farmers per tree (labor, inputs, equipment) reduces proportionally to the size of the plantation
- The large farmers use less labor as a percentage of the total investment
- The small farmers invest by necessity to maximize the revenue (to ensure their food security)
- The large farmers invest in response to the price of cherries and to maximize the profits

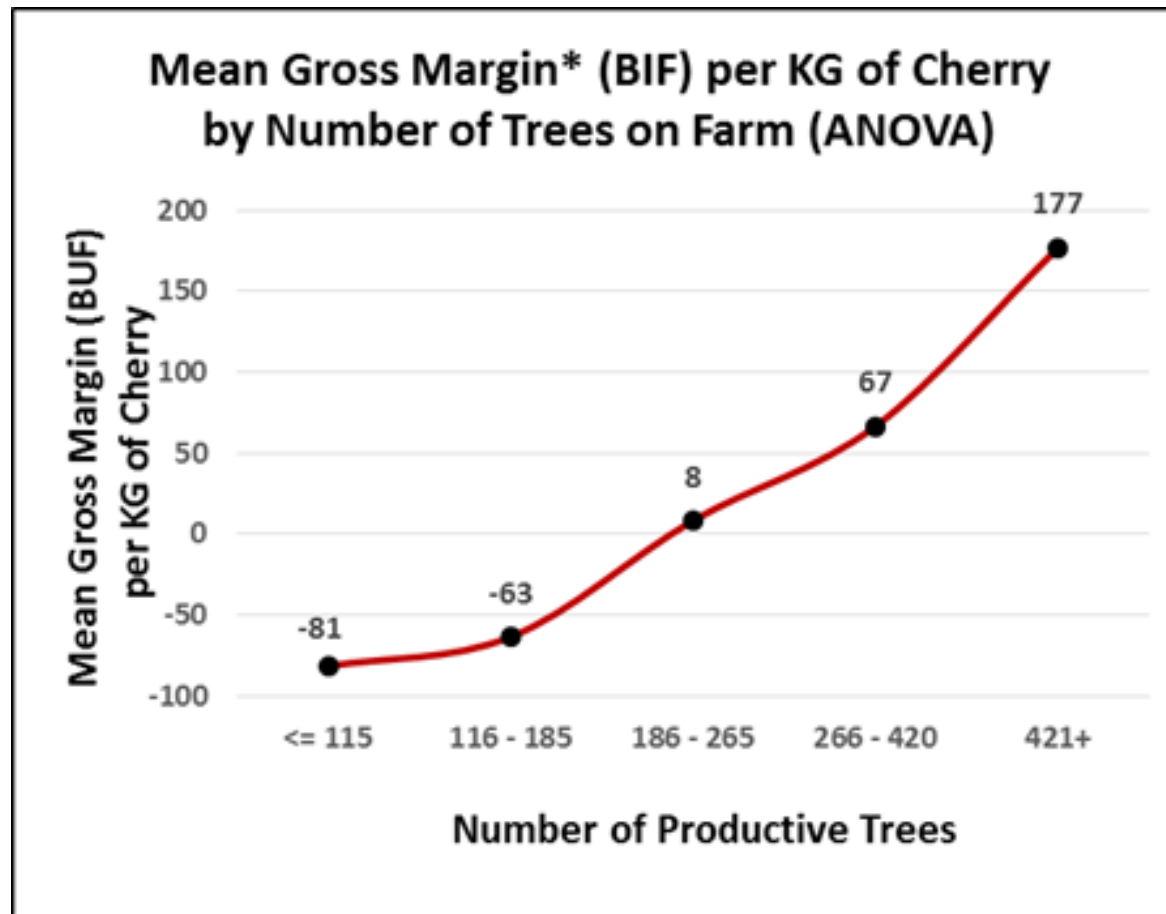
# Do investments in the small coffee farms translate into higher productivity?



- The small coffee farmers are more productive than the large ones
- They must produce to maximize their food security. They have limited other options.

Source: Enquête d'AGLC Burundi sur les producteurs de café 2015-16

# Are the profits and returns higher for those who invest the most?

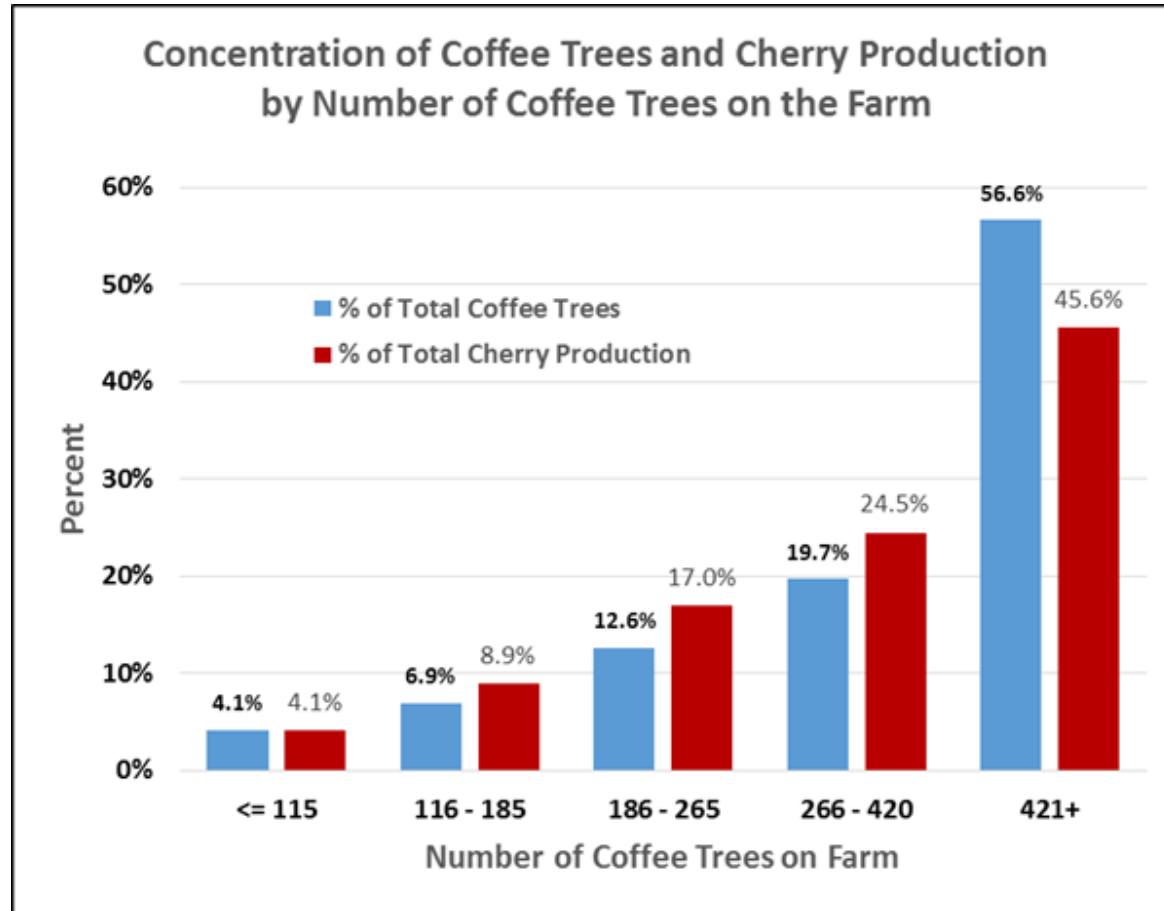


- No, the small coffee farmers have higher productivity but they also have negative gross margins
- The large coffee farmers have positive gross margins but still not very strong
- The producers absorb most of the risk of a poor crop due to drought, pests, etc.

Source: Enquête d'AGLC Burundi sur les producteurs de café 2015-16



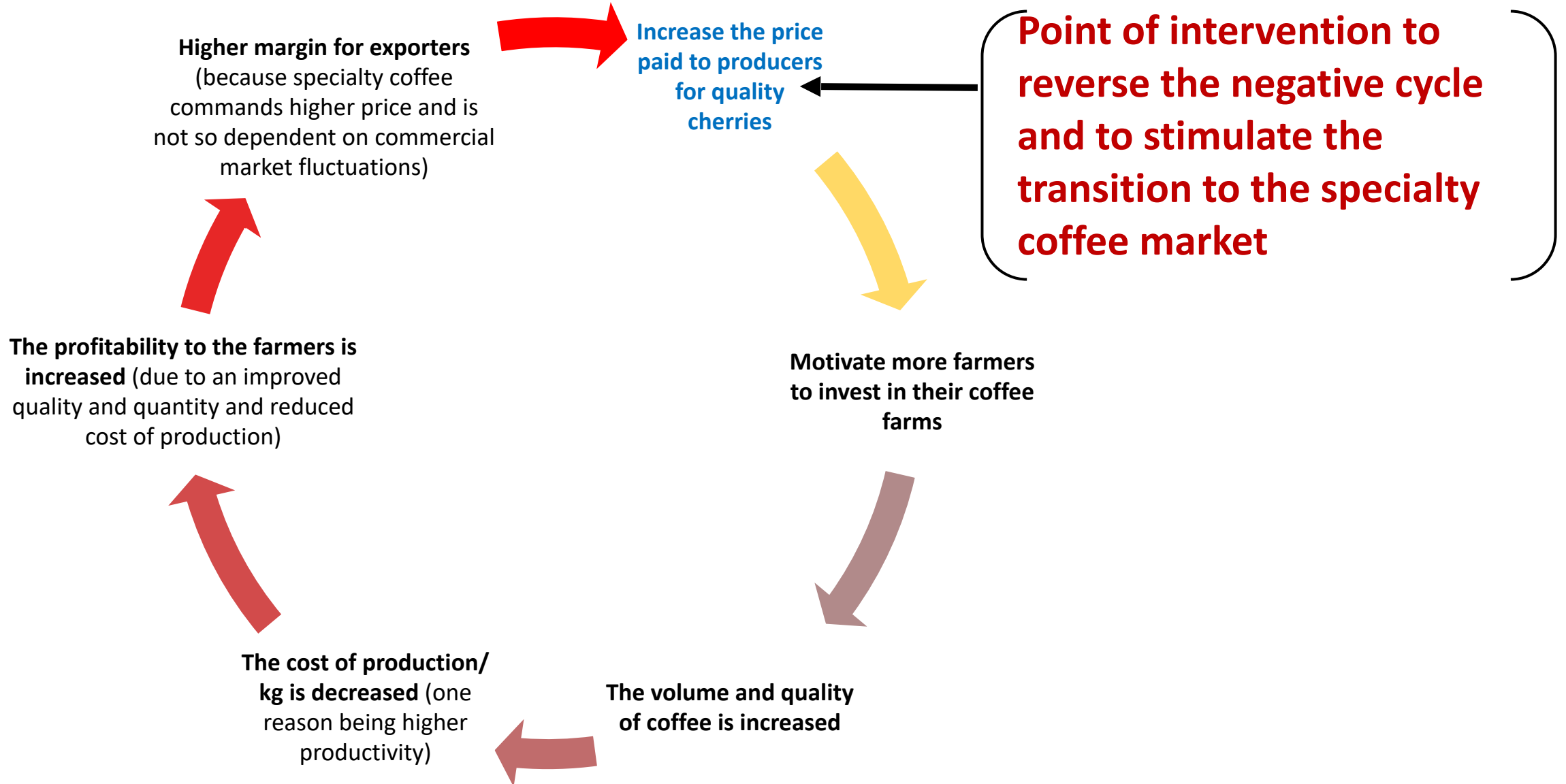
# Dans quelle mesure la nombre do pieds de café et de la production de café est-elle concentrée au Burundi?



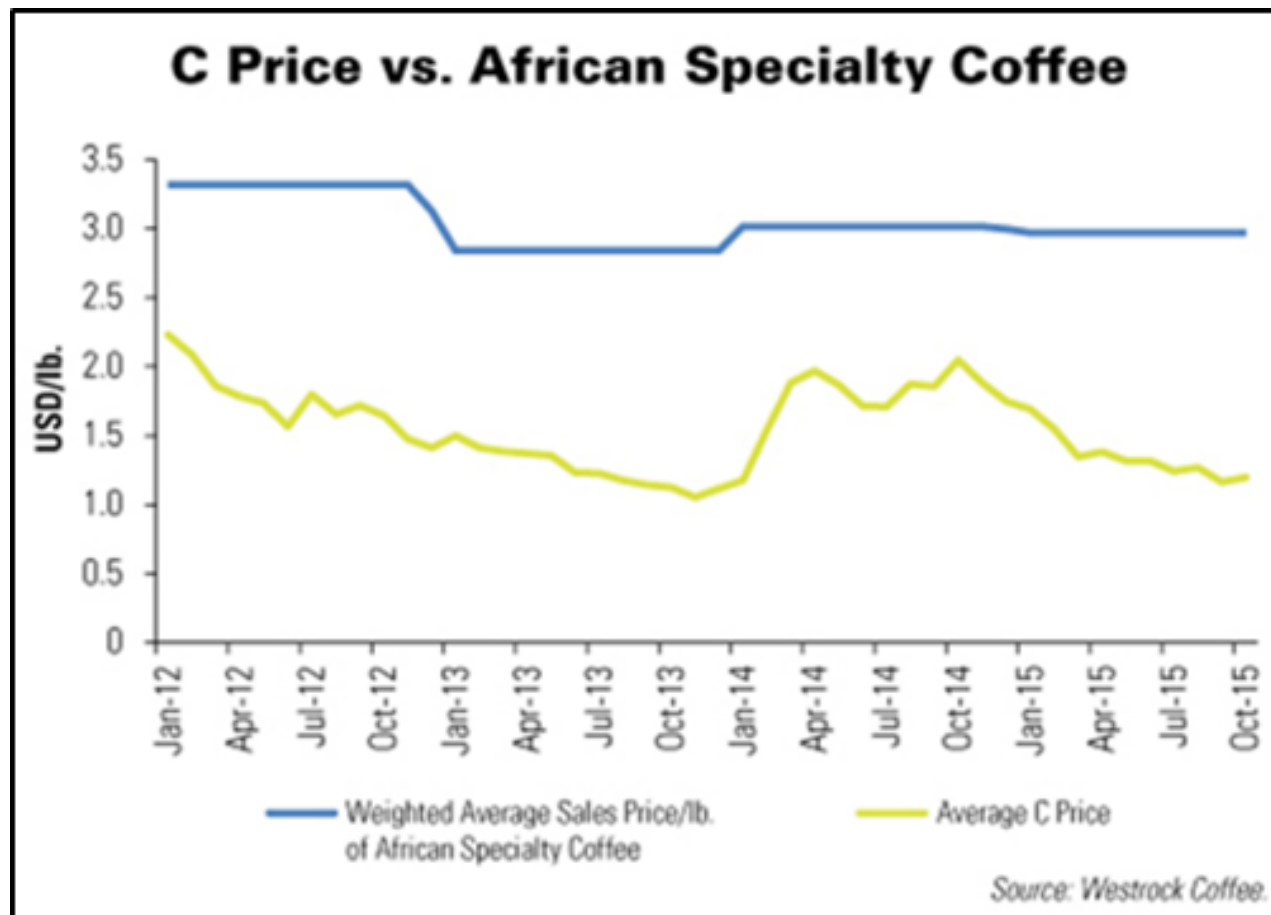
Source: Enquête d'AGLC Burundi sur les producteurs de café 2015-16

- Plus de la moitié (56,6%) de tous les caféiers sont situés dans le plus grand quintile de plantation (421+ arbres), et plus de 75% dans des deux plus grands quintiles).
- Malgré la concentration des pieds de café dans le quintile le plus important (421+), ce groupe de caféiculteurs a une productivité inférieure aux autres et constitue donc la seule taille de plantation avec une sous-production (colonnes rouges) par rapport à leurs nombres de pieds (colonnes bleues)

The price paid to the coffee producers is an important catalyst for the transition to specialty coffee market

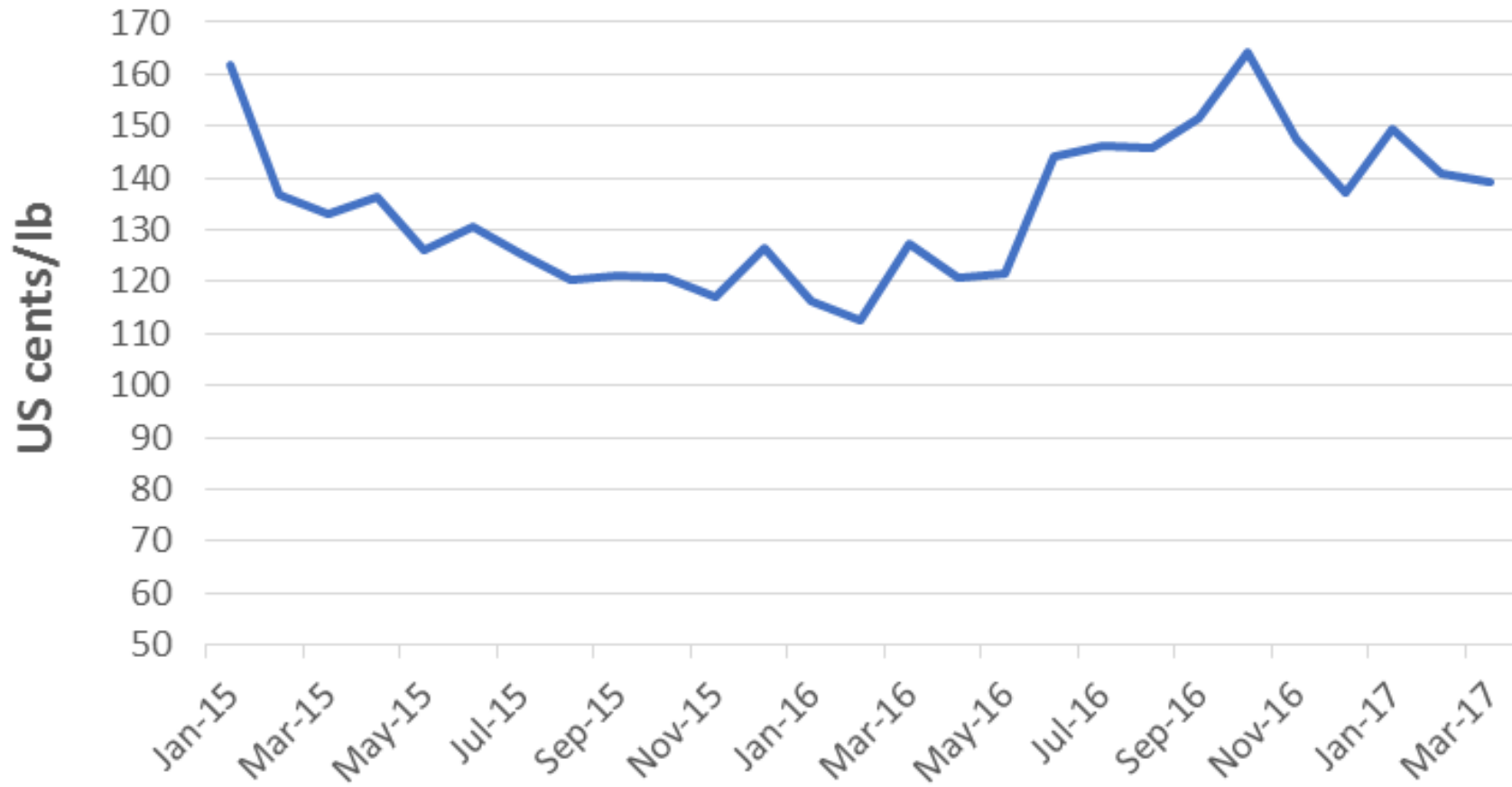


# Comparison of African specialty coffee prices to NYBOT

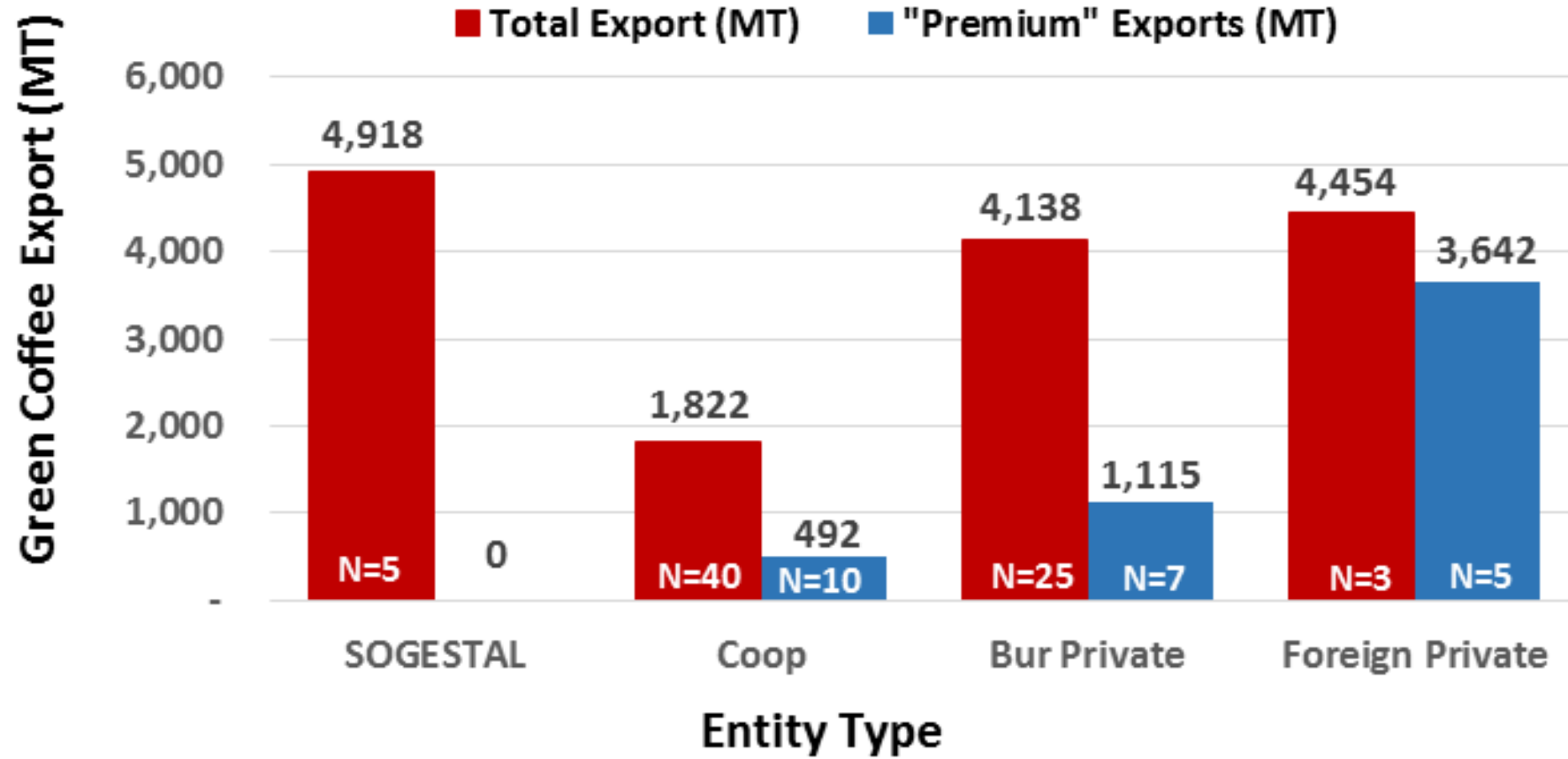


- The price for specialty coffee is much higher than that for commercial coffee
- The price for specialty coffee is more stable and less related to the NY commercial prices

## NYBOT C Prices monthly averages (US cents/lb)



## Burundi Total and Premium Exports by Entity Legal Status (Season 2015-16)



## Burundi Total and Premium Exports by Entity Legal Status (Season 2016-17)

