


Parallel Universes:
**Exploring the Worlds of
Coffee and Chocolate**

Zohara Mapes Bediz, TCHO Chocolate
Norbert Niederhauser, Cropster
Kathryn Tomajan, Eat Retreat



Celebrating 25 Years of Excellence

Zohara Mapes Bediz, TCHO Chocolate; Norbert Niederhauser, Cropster; and Kathryn Tomajan, Eat Retreat

A Comparison

State of the Industry

- Olive Oil
- Coffee
- Chocolate



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California Olive Oil

- 18th Century - Cultivation began
- 1990s - New wave of quality production
- Today - US is the second largest market of olive oil after Europe



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TRENDS IN Production

2011
California production represents <1% of US market

2016
California production represents nearly 6% of the US market



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TRENDS IN Consumption

50% of US households buy olive oil

The average price of a 500ml bottle is **\$5.00**

California olive oil is priced **30%** higher than imports

Information gathered from a presentation by Mike Forbes, California Olive Ranch, at the Olive Oil Symposium, UC Davis, 1/17/2017.



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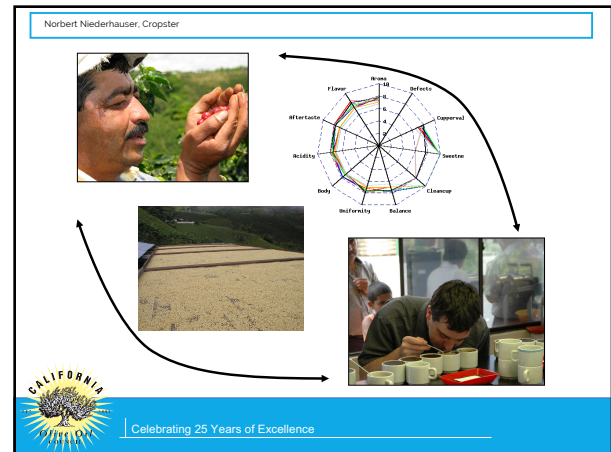
Norbert Niederhauser, Cropster

About me ...

- IT – information and communication engineering
- Researcher at International Center for Tropical Agriculture (CIAT, Colombia)
- Co-Founder of CROPSTER: information management platform for high-value agricultural products (Coffee, cocoa, tea, olive oil, ...)
- Working with coffee industry since 2003



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What is a Specialty Product

Different aspects of quality

- Intrinsic Quality**
 - Variety
 - Production Process
 - Taste / sensorial characteristics
- Symbolic Quality**
 - Farm pictures, area maps
 - Certifications (organic, ...)
- Service Quality**
 - Additional information
 - Traceability
 - Education

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Specialty Coffee Industry Market development

- Specialty Market**
 - Substantially grew and changed in last 10 years
 - New products - green as well as final products: roasted/brewed
- SCAA - SCA**
 - Founded in 1982 (35 years)
 - Training / R&D
 - The rising tide ... >> collaboration
- Sustainability**
 - Climate change will have effect on coffee growing regions

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QC / QM Measure and Control Q

An integrated task

- Sensorial Analysis**
 - Cupping
 - SCAA / CoE / RG-RE /
 - Buying vs. production
- Physical Analysis**
 - Humidity
 - Screen size
 - Defects
- Constant Feedback Loops**
 - Standards
 - Communication

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Sessions

Test - SCAA

Review

A

Aroma

Flavor

Acidity

Body

Balance

Clean Cup

10

Overall

Roast

Dry

Break

Aftertaste

Intensity

Intensity

Uniformity

10

Sweetness

10

Defects

0

30

+ Descriptors

General comments

B

Aroma

Flavor

Acidity

Body

Balance

Clean Cup

10

Overall

Roast

Dry

Break

Aftertaste

Intensity

Intensity

Uniformity

10

Sweetness

10

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0

30

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General comments

C

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0

30

+ Descriptors

General comments

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Sessions

Test - Production

Review

Sample A

Calculated score: 0 - Override

Body

Acidity

Sweetness

General Descriptors

General comments

Sample B

Calculated score: 0 - Override

Body

Acidity

Sweetness

General Descriptors

General comments

Sample C

Calculated score: 0 - Override

Body

Acidity

Sweetness

General Descriptors

General comments

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Refine search

Sort by

Warehouses

Shipping Country

Flavors

Cultures

Processings

Listing Status

Origins

Card Certifications

Format

San Gabriel

Finca El Durango

Rancho FWH - Colombia

Colombia - FAF Special

Colombia San Rafael

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Tres Santos Colombia

COLOMBIA

Melon, Tropical, Light Sugars

This edition of Tres Santos is a custom-built sizzler that combines coffees from small farms located in the Cauca region. Together these lots become something complex and compelling exhibiting sweet flavors of watermelon, hibiscus, and cherry cola.

SKU 204001

Country Colombia

Region within Country Cauca

Elevation 1800 - 2000 m.a.s.l.

Farmer / Producer Name combined individual smallholders

Buyer Geoff Watts

Cultivar Castillo, Catuira, Colombia

Harvest Time May - July 2016

Harvest Year 2016

DIRECT TRADE

SINGLE ORIGIN

IN SEASON

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ELEVATION

REGION

LENGTH OF DT RELATIONSHIP

FAIRM SIZE

HARVEST LENGTH

HARVEST PERIOD

FLOWERING MONTH

CHERRY MATURATION TIME

SHADE

SHADE TYPE

AGE OF FARM

NUMBER OF VARIETIES PLANTED

TREES PER HECTARE

IRRIGATION TYPE

DIURNAL TEMPERATURE RANGE

OTHER FARM PRODUCTS

PRODUCER TYPE

GENETICS

RIPE CHERRY COLOR

AGE OF PLANT

FERTILIZATION

CHERRY SEPARATION

WET MILL LOCATION

PROCESSING METHOD

WET MILL WATER SOURCE

DRYING TIME

DRY MILL ELEVATION

DRY MILL SORTING

FERMENTATION

FERMENTATION LENGTH

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PANAMA

EVELIA MARIA HONEY GESHA

ROSE HIP - POMEGRANATE - JUICY

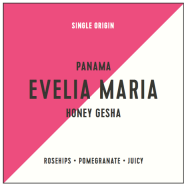
COSTA RICA

FINCA SALACA

FIG - LEMON CURD - TEXTURED

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CUP CHARACTERISTICS
The juicy acidity and underlying florality of rose hip is teamed-up with pomegranate-like fruit notes in this returning, honey-processed 'old-vine' gesha selection.

SOURCING INFORMATION
So close to the farm "Jurutungs" - meaning "A place very far away and hard to get to" - in the Costa Rican border, that my phone connected to a Costa Rican wireless network whilst walking through its rows of Gesha, Catara and Catara trees.
Jurutungs was a freshly planted farm of Catara, Catara and a modest hectare of a rust-resistant experimental variety called Gesha. Gesha was introduced to Panama by way of the Costa Rican Coffee Research Institute, to whom seeds - among which was Gesha - were distributed from the Ethiopian Coffee Mission of 1964. It wouldn't be until 2003, that the true potential of Gesha would be discovered at the nearby Hacienda La Esmeralda.
Jurutungs was passed down from Evelia Maria Galleto to her daughter Daphne and son-in-law Alejandro who engaged the talents of Panamanian producer-extraordinaire, Giacomo Cruz. Beginning in 2009, the team took over the overgrown farm and reinvestigated the land by stumping the existing trees and allowing them to regrow. The result, the rebirth of some of the world's oldest gesha trees on one of the highest farms in Panama.
A North American exclusive offering, Evelia Maria Honey Gesha celebrates "old-vine" character and tenor of one of the most intriguing farms we've come across to date.

PRODUCER DAPHNE GALLETO, ALEJANDRO CRUZ, GARCIA REVELLA & GRACIANO CRUZ
REGION PIEDRA CANDELA
PROCESSING HONEY PROCESS
CULTIVAR GESHA
ELEVATION 1800 - 2100 METERS
HARVEST DECEMBER - FEBRUARY

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INTRO TO
Chocolate




TCHO
Chocolate Maker & R&D




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A BREIF
History of Industry


- A sacred plant consumed for thousands of years as a drink
- Taste for chocolate developed in the west driving colonial / commodity markets
- The tree was spread around the world to supply demand, using cheap labor focusing on quantity over quality
- As drive for dark chocolate grows the quality of beans needs to improve to taste good
- Specialty chocolate is currently only about 1-2% of the overall market



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COMMODITY & SPECIALTY
World of Cocoa Beans



COMMODITY COCOA BEANS

- JAN 2016 \$3000 MT
- JAN 2017 \$2000 MT

SPECIALTY COCOA BEANS

- Sold for \$100-3000 over commodity market price

WORLD COCOA PRODUCTION

- Over 70% of the world's cocoa is grown in West Africa
- Around 17% is grown in Central and South America
- 2015/16 bean volume harvest 4.031 million MT

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STATE OF INDUSTRY NOW
Chocolate Market

- Premium and dark chocolate are the strongest segments of the market in the United States in terms of growth, though not market share
- Grocery stores are the largest seller, followed by mass merchandise outlets and convenience stores


Key Chocolate Industry Indicators

Year	Total Market		Premium Segment		Ethical Segment	
	Total Sales (\$ billions)	% CHG	Total Sales (\$ billions)	% CHG	Total Volume (1,000 MT)	% CHG
2014	\$21.1	2.9%	\$2.5	9.0%	15,164	41.5%
2015	\$21.8	3.1%	\$2.7	9.0%	21,508	41.8%
2016e	\$22.4	3.2%	\$3.0	10.0%	27,941	30.0%

e = estimated Sources: Wreeland & Associates, NCA, Fair Trade USA, Rainforest Alliance and UTZ

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Uncovering
Parallels




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COFFEE & CHOCOLATE
Market Trends

How has your market and in turn the industry changed over the last 10 years?



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DEFINING
Quality

How are grades, standards and quality parameters defined in your industry?

What is the evaluation process like?

From a sensory perspective, what distinguishes a quality product?




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THE MARKET
Commodity vs. Specialty

Within your industry, how are craft products being distinguished from commodity products?

Are there issues with fraud & mislabeling in your industry?




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SPECIALTY COFFEE & CHOCOLATE
Target Market

Who is eating craft chocolate and drinking specialty coffee?

Are producers using production & sensory information—such as flavor profiles, tasting notes, designations of origin—to distinguish their products?



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CONSUMER
Education

How sophisticated is your consumer?

Can you point to successful examples or milestones in consumer education?

Any advice for our producers & olive oil industry?




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**THANK
YOU!**



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