RWANDA COFFEE SECTOR PRESENTATION
The Coffee Sector
Coffee introduced by Germans in 1904
Mainly ‘bourbon’ type of Arabica coffees
Production between 267,000 and 420,000 bags per year
400,000 small holder farm families produce it and depend on it for their livelihoods
100% small holder produced
Average size of plantation of 200 trees
Total area in coffee is currently 35,000 hectares grown at altitudes between 900-2400M a.s.l
Average yield per hectare is 700 kilograms of green coffee
Sector Background
Country Coffee Distribution and Wet mills

- Number of coffee trees: 90,000,000
- Number of cooperatives: 207
- Number of Coffee Washing Stations: 210
- Annual average production (MT green coffee): 20000
Rwanda Coffee Plant Cycle

<table>
<thead>
<tr>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
</tr>
</thead>
</table>

- **Flowering**
- **Crop expanding**
- **Crop maturing**
- **Ripening**
- **Harvesting**
Sector Transformation

- Sector radically transformed in the 21st century towards quality.
- New government targeted coffee as a priority sector.
- Liberalized coffee sector.
- Cooperatives were formed.
- Emphasis was placed on quality through Cup of Excellence competitions (2008-to-date).
- Private sector encouraged to build processing centers.
- Laboratories built.
Impact on Sector

- Foreign exchange earnings on specialty coffee have risen from $0 in 2001 to over $27,000,000 in 2011
- Total earnings increased in coffee from $20M in 2002 to $74.6M in 2011
- Today, U.S., European and Asian coffee companies like Starbucks, Costco are buying almost 5,000 tons annually, directly from the growers.
Trend in the increase of CWS number
Sector Strengths

- Coffee liberalization
- Competitive quality
- Developed infrastructure
- High participation of its stakeholders (financial institutions, exporters, partners, and buyers).
- Favorable environment
- Organized farmers
**Sector Strengths**

- Volcanic soils: recent and weathered.
- Varieties: 80% Arabica bourbons.
- Perfect rainfall and temperatures: 2 m and 25ºC.
- Huge skilled labor force: 80% of the population working in agriculture.
RIPE COFFEE CHRIES READY TO BE WET PROCESSED.
THE COFFEE WASHING STATIONS
CONVENTIONAL COFFEE WASHING STATIONS
Way Forward

• Increase awareness in sustainable coffee farming, thus increasing production/yield per tree.
• Improve soil fertility (fertilizer distribution, soil and leaf analysis).
• Strengthening farmer organizations
• Value addition
Quality control

- This coffee is processed in a coffee washing station.
- Training of Q-graders and coffee cuppers.
- Establishment of well equipped coffee cupping laboratories all over the country.
- Provide sorting facilities to exporters to eliminate defects.
- Controlling antestia bugs.
- Using floatation methods at the coffee washing stations.
- Cupping coffee before export and provide a quality certificate.
<table>
<thead>
<tr>
<th>Description</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Production</td>
<td>26000</td>
<td>28000</td>
<td>30000</td>
<td>32000</td>
<td>34000</td>
</tr>
<tr>
<td>Fully washed</td>
<td>9500</td>
<td>12000</td>
<td>15000</td>
<td>19000</td>
<td>24000</td>
</tr>
<tr>
<td>Semi Washed</td>
<td>16500</td>
<td>16000</td>
<td>15000</td>
<td>13000</td>
<td>10000</td>
</tr>
<tr>
<td>% FWC</td>
<td>37</td>
<td>43</td>
<td>50</td>
<td>59</td>
<td>71</td>
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<tr>
<td>Revenues (million USD)</td>
<td>108,55</td>
<td>119.2</td>
<td>130.5</td>
<td>143.1</td>
<td>157</td>
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<tr>
<td>Washing stations</td>
<td>249</td>
<td>274</td>
<td>299</td>
<td>324</td>
<td>349</td>
</tr>
</tbody>
</table>
THANK YOU