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The Evolution of *Coffee in France*

- Decaf Is Far From Dull • Single Serve's Influence Is Growing
- The French Tea Market • Special Report: Roya Update

less herbicide used to control weeds. Mulch allows soil to retain moisture and rich compost requires less chemical fertilizer to be spread. Leonard noted that this new method also reduces labor cost since pruning and harvesting is done in one step.

The healthy profits over the last two years have resulted in major investments being made throughout growing regions in Brazil, new harvesting equipment to implement the new method, new wet mills (use less water) and new dry mill processing equipment (one machine with a relatively small foot print that removes sticks and stones, hulls and sorts). Farmers are also recycling the water used in wet milling to limit the amount of water utilized.

"New methods and investments seen across coffee-growing regions are helping to ensure an excellent steady supply of premium quality Arabica coffee for many years to come," reported Leonard. "Brazil continues to be the leader in the technology and advancement of cost-efficient coffee production."—VLF

Dispatches from the Field: Colombian Picker Migration

Shifts in weather, most notably irregular periods of rainfall, have lead to sporadic flowerings across Colombia, meaning there is ripe coffee to harvest all year long. Harvesters must pass through all lots once every two weeks both to prevent fruit from over-ripening and to control broca. Changes in growing patterns require more hands on deck, hands that are hard to find. Rural FNC (National Federation of Colombia) extensionist Arturo S. noted that increasingly, "Coffee is falling off the trees because there's no one to pick it."

Availability of labor is a top preoccupation on all farms that rely on hired help to harvest. The lack of pickers is the con-



sequence of workers choosing to start cultivating coffee on their own small parcels of land, finding more lucrative jobs in mines, or moving to cities. The majority of pickers who have migrated to urban centers are lifetime workers who have saved enough money to "retire" to less demanding jobs- and to take their families with them, meaning there is no emerging generation of "seasoned" pickers who are accustomed to working in the conditions of harvesting, namely navigating steep slopes while carrying heavy loads of ripe coffee cherries. Many farms—as well as Cenicafe (National Coffee Investigation Center, Chinchina, Colombia)—are looking further into semi-mechanized possibilities for harvesting, such as hand held shake devices attached to a backpack battery power source.

One of the FNC's current major educational initiatives centers on encouraging coffee growers to run their farms as businesses, and therefore carefully analyze costs. The FNC committee in the Department of Caldas is the first to support this initiative with the online platform "MisCostos," which lets growers input detailed figures surrounding operational expenses, thus facilitating informed

decision making. Because the data is input online, this streamlines farm statistics collection, letting rural FNC extensionists spend less time gathering data and more time working with growers.

While this platform empowers farmers, growers don't need a system to know that they're selling well below the cost of production. This hasn't prevented a small wave of new plantings. A general decrease in violence in recent years has meant that many people are optimistic enough to return to farms that have been abandoned for decades to start cultivating coffee again. But coffee growers who have been consistently producing express a general frustration that they have to sell quality coffee at prices half of what they were not long ago. This discouragement is leading many to pursue alternative crops such as citrus, avocado and tomato. Although the FNC is not specifically promoting diversified land management, many growers are electing to adopt more integrated farming methods in order to compensate for low coffee prices.

Because the price is so far below cost of production, some farmers are neglecting to fertilize or spray to control plagues in an effort to cut costs. In this economic environment, soil analysis is the best investment for growers, enabling them to focus spending on the most urgent agonomic needs for their specific land.—RV

SEEN&HEARD...

At the the NCA Annual Convention in March in San Francisco, sustainability, single serve and Prop 65 were areas of focus for the seminars and key conversations on the show floor.

Referring to Prop 65, one attendee lamented, "There's a freight train coming and we're sitting in center of the tracks."

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Updates from Cenicafe

Cenicafe's continuing advances in new varieties and pesticides help Colombia minimize the damage of roya and broca.

Demonstrated Success

Cenicafe (Colombia's National Coffee Research Center in Chinchina) culls its extensive research in order to generate generic recommendations that are best-fit solutions for farms of every scale.

In terms of roya prevention, the recommendation was, "plant Variedad Colombia," which then evolved into "plant Castillo." Because of this consistent and aggressive campaign, 54 percent of hectares planted with coffee are resistant varieties, with the remaining 45 percent in susceptible varieties, predominately Caturra. Coffee leaf rust's rampage tested Castillo's effectiveness, which proved resistant enough for Colombia to largely evade the roya crisis.

The outbreak did result in a higher incidence of roya this year than past years, but the effects were not nearly at the devastating levels seen in Central America, and some farms escaped completely unaffected. Roberto Mejía, FNC extensionist in Chinchina, Caldas, explained, "Even those with susceptible varieties avoided being harmed by roya because they know how to manage what they have." Colombia's legacy of technified coffee means that growers with susceptible varieties fertilize and fumigate diligently enough that most managed to skirt disaster.

With the recent "success" of

Colombia's Predicted Coffee Production by the Figures

	% of Colombia's Coffee Growers	% of National Production	# of Hectares in Production
Small <5 hectares	96	70	500,400
Med 5-10 hectares	3	12	83,800
Large 10+ hectares	1	18	110,000
Total hectares in production			694,200



Source: Cenicafe

Year	Average # of 60-kg sacs/hectare
2008	15.1
2009	10.2
2010	11.4
2011	11.8
2012	11.1
2013	13.9

The anticipated increase in production for the remainder of 2013 comes partly from the high density of young plantations that are producing their first harvest.

Castillo, the FNC continues to promote further renovation to resistant varieties, as well as increasing densities of trees per hectare. Credits of up to \$300,000 USD/hectare are available for renovation of farms with parcels of trees over nine years old.

While the FNC touts cup quality of Castillo as equal to that of more traditional varieties, independent Q graders find it not quite comparable. Lots of Castillo-only coffee consistently cup around 85 points.

Outlook

Some of Cenicafe's more recent investigations center on alternative broca treatments. Current products to control broca

are moderately toxic pesticides that kill the insect or its eggs. The new approaches to broca control are less toxic and paralyze the insect such that it cannot bore its way into the coffee cherry. Sygenta's Bolian Flex and Dupont's Presa have been thoroughly tested by Cenicafe and were released last month for sale in local agro supply stores. Attractive to farmers not only because of their reduced toxicity, but because both products remain effective up to 40 days after application; the initial stocks sold out almost immediately.

Coops and other coffee buyers report a consistent instance of over 10 percent of broca, often 15 percent or 20 percent, in specific regions across country.—*Rachel Northrop*

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