

What will it take to secure the future of coffee?

Coffee's future is in peril. Climate change is reducing the diversity of coffee origins and production as consumer demand grows. Coffee producers, who are typically smallholders in low-income countries, face economic, social, and environmental challenges that put their livelihoods, and global supply chains, at risk.

Reducing poverty would help alleviate many of these challenges—something development investments are well-placed to do. Coffee requires many interventions, including near-term support to smallholders and their communities to protect livelihoods and the environment. Coffee agricultural research and development (R&D) has a critical role to play as it generates innovations to address the range of sustainability challenges faced by farmers.

THE CURRENT SCENARIO


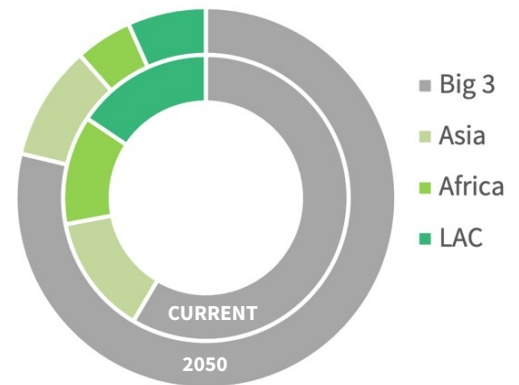
Underinvestment in R&D drives instability, consolidation, and loss.

- Fewer farmers, fewer countries.
- Loss of diversity.
- Greater supply instability.

Market share projections¹

\$452 million
annual global gap in ag R&D for coffee

12.5 million
number of smallholders that grow coffee

A DIFFERENT FUTURE

Greater shared investment in R&D builds a thriving industry.

SMALLHOLDERS



Reliable income for a path out of poverty + fragility

EXPORT COUNTRIES



Steady or increased export revenue for development

COMPANIES



Stable, high-quality, and diversified supplies to meet demand

CONSUMERS



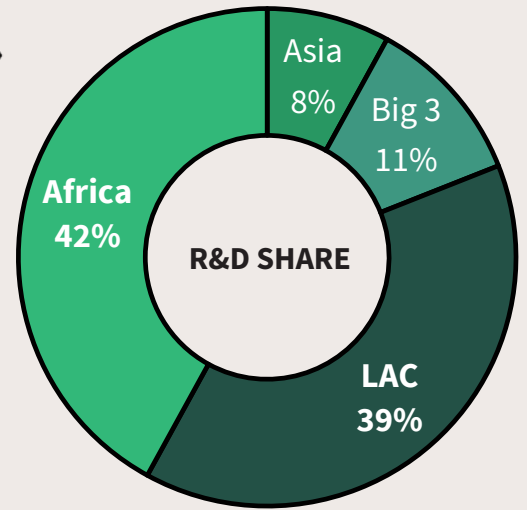
Diversified coffee flavor and origin options

¹The Big 3 refers to the largest coffee exporting countries with sophisticated systems: Brazil, Colombia, and Vietnam.

How we get there



- Invest **\$452 million** more² per year in coffee agriculture R&D to preserve origin diversity across many countries and support farmers to adapt to climate change.
- Channel over **80%** of this investment to Africa (\$190 million) and Latin America + the Caribbean (\$176 million).³
- Greater small holder support is essential, too; R&D helps make these sustainability investments more efficient and effective by driving poverty reduction.

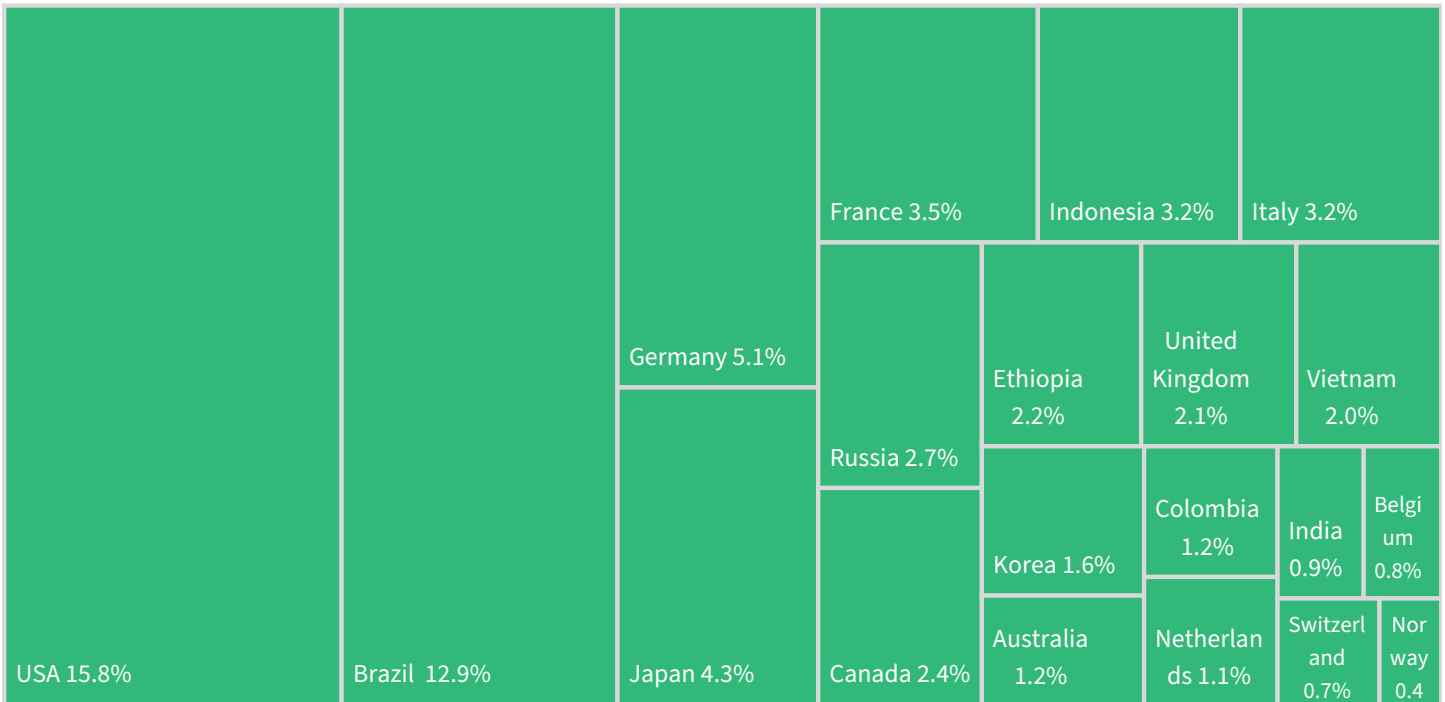


A SHARED ENDEAVOR

Securing the future of coffee and reducing supply risks require investments in agricultural R&D. Given the long-term focus of R&D, the public sector has an important role to play in complementing private sector investment.

Below are **consumption data across countries** where coffee is most popular. This provides an entry point for discussing equitable contributions to close the coffee agricultural R&D investment gap.

All other consuming countries = 33%



²Current investment from all sources is about \$115 million USD per year. To meet consumer demand and retain origin diversity amid climate change, a total investment of \$567 million USD per year is needed. Source: Maredia, M. and Martinez, J. (2023). How much should the world invest in agricultural R&D for coffee amid growing consumer demand and climate change challenges? [pre-publication white paper].

³The two historically underinvested regions for coffee agriculture research and development.