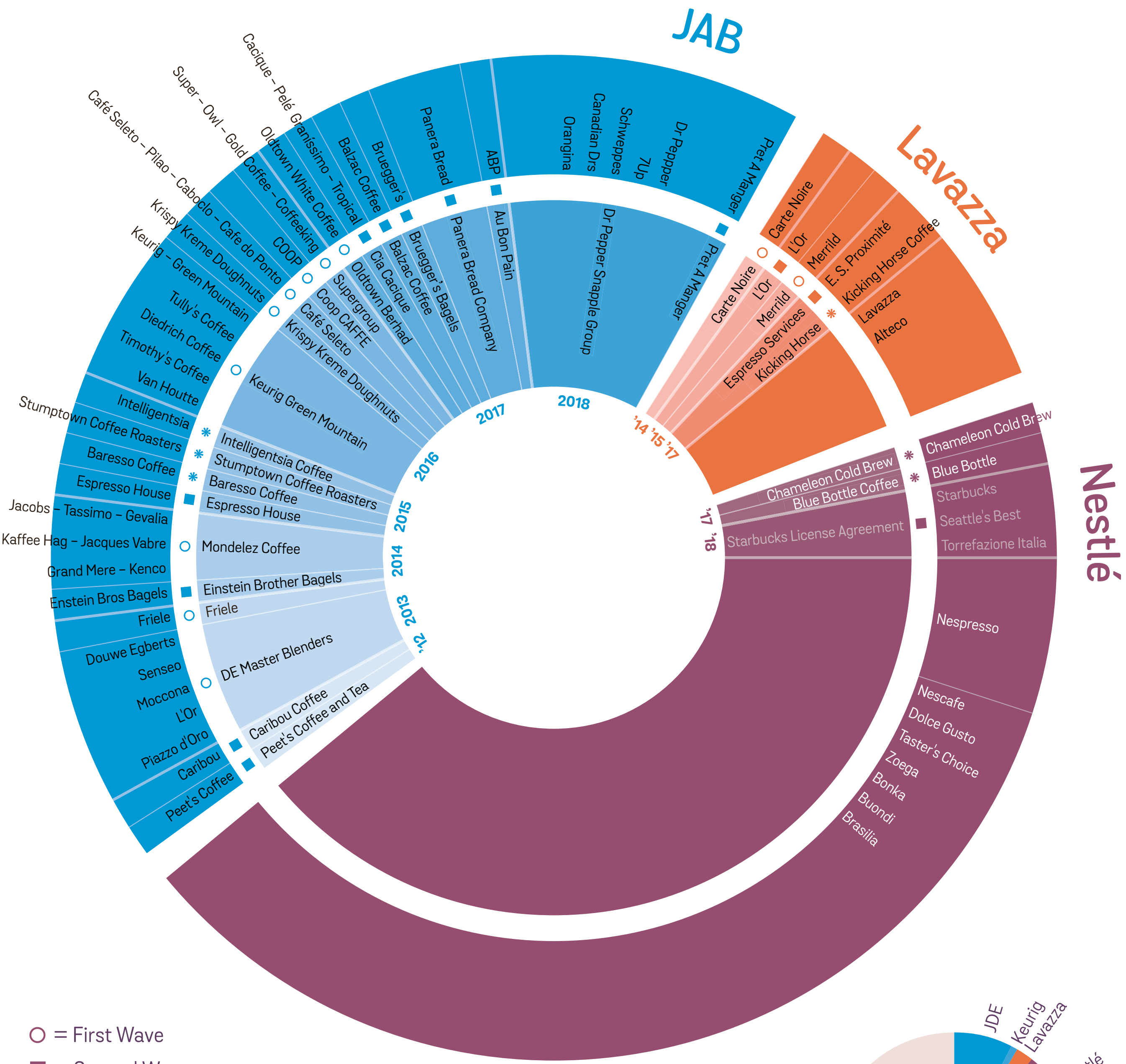
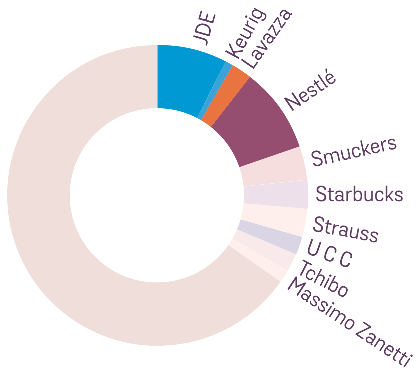
Figure 1: **Main acquisitions and brands 2012–2018**



○ = First Wave
■ = Second Wave
✻ = Third Wave



Top ten roasters =
35% of world's coffee

Main acquisitions and brands 2012–2018

The data for this infographic is based on media coverage of acquisitions and mergers, companies' websites and annual reports.

First Wave: Brands focusing on standardisation and volume, for at-home consumption (large roasters and grocery retailers).

Second Wave: Brands focusing on coffee origins and roasting styles, differentiation based on higher quality and out-of-home consumption (coffee chains).

Third Wave: Independent coffee shops focusing on consumer interaction with high quality coffee and a variety of brewing techniques.

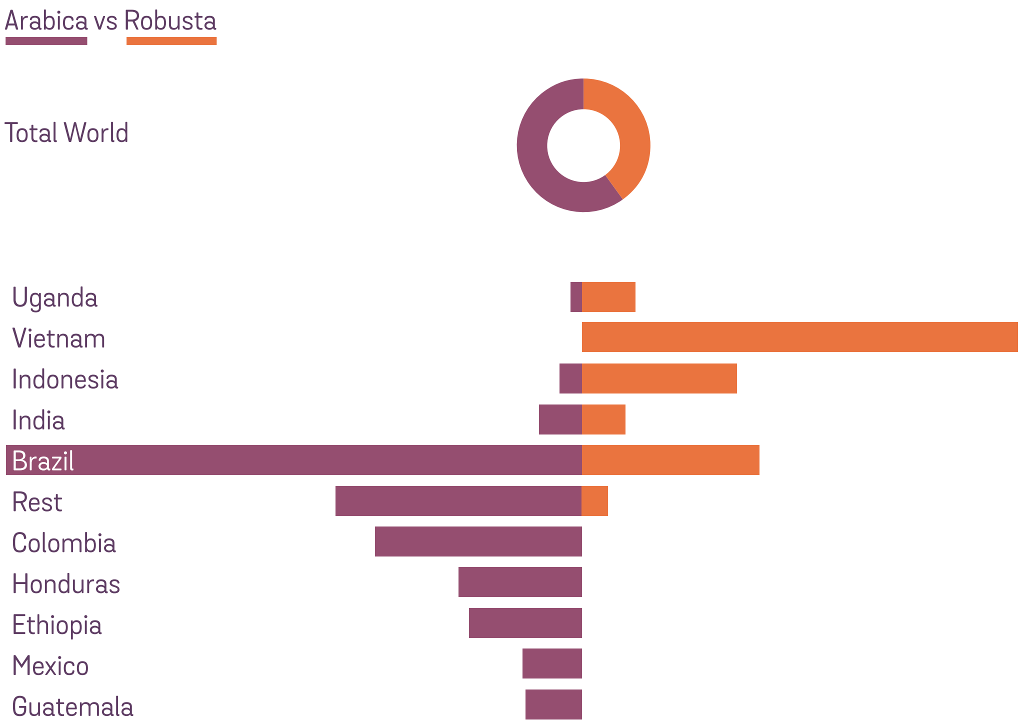
Global volume of coffee 2016/2017: 157,7 million bags

Green coffee conversion

1 bag = 60 kilogram

1,0 tonne = 1,000 kilogram = 16,67 bags

Figure 3 **Top ten coffee producing countries**



Top ten coffee producing countries

Data on production of Arabica and Robusta:

– ICO (2018). Total production by all exporting countries. Data as of April 2018 – ICO.

– UN Comtrade database (2018). 090111 coffee, not roasted or decaffeinated; comtrade.un.org/data

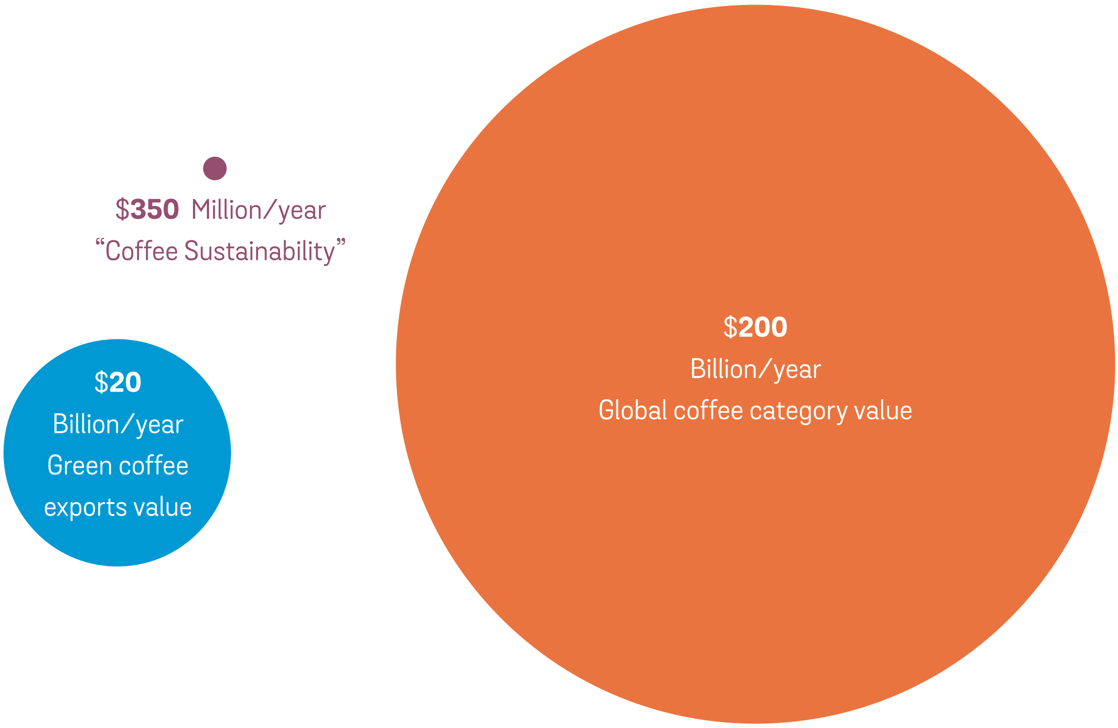
Global volume of coffee 2016/2017: 157,7 million bags

Green coffee conversion

1 bag = 60 kilogram

1,0 tonne = 1,000 kilogram = 16,67 bags

Figure 4: **Inequality in the coffee value chain**



Inequality in the coffee value chain

Data on global coffee category value and value of coffee exports to producing countries:

- Samper, L., Giovannucci, D. and Marques Vieira, L. (2017). The powerful role of intangibles in the coffee value chain. Economic research paper No.39. WIPO.

Data on global investments in sustainable coffee production:

- Steemers, S. (2016). Coffee sustainability catalogue 2016. A collective review of work being done to make coffee sustainable. GCP, SCA, SCC.

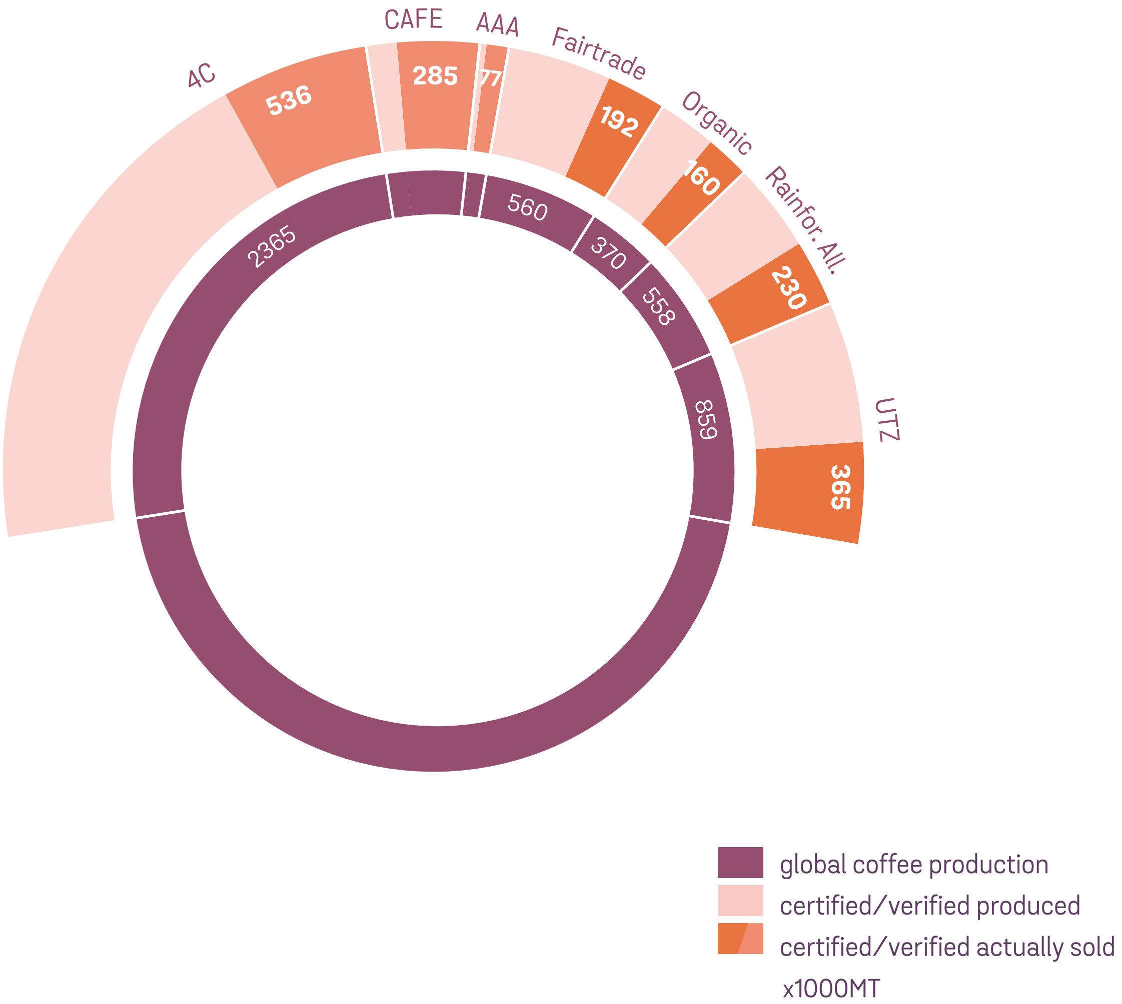
Global volume of coffee 2016/2017: 157,7 million bags

Green coffee conversion

1 bag = 60 kilogram

1,0 tonne = 1,000 kilogram = 16,67 bags

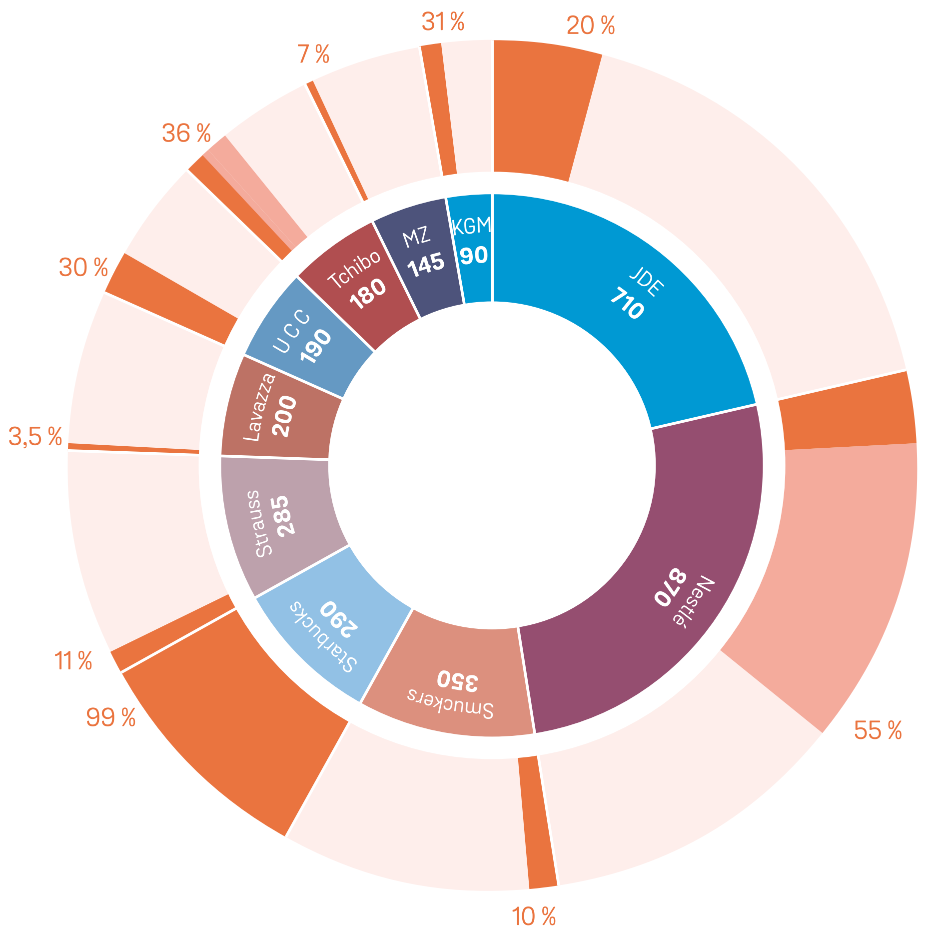
Figure 5: **Global market share and demand VSS in 2017**



Global market share and demand VSS in 2017
Data kindly provided by 4C CAS, Rainforest Alliance, UTZ, Nestlé, Starbucks. (the total volume of Nespresso AAA and C.A.F.E. Practices is our own estimate). Fairtrade is our forecast, based on FLO statistics of 2016. Organic is an estimate based on statistics in:
– Lernoud, J. et al. (2017). The State of Sustainable Markets – Statistics and Emerging Trends 2017. ITC, Geneva.

Global volume of coffee 2016/2017: 157,7 million bags
Green coffee conversion
1 bag = 60 kilogram
1,0 tonne = 1,000 kilogram = 16,67 bags

Figure 6: **Top ten coffee roasters; market share and demand VSS in 2017**



Inner circle: Volume of green coffee in 2016/17

Outer circle: percentage of volume purchased as certified or verified

= volume certified

= volume verified

x1000MT

Top ten roasters; volume and VSS in 2017

Data kindly provided by the companies.

The J.M. Smucker Company is an estimate.

For specific information about companies and VSS, see page 22–24; summary of sustainability policies and practices

Global volume of coffee 2016/2017: 157,7 million bags

Green coffee conversion

1 bag = 60 kilogram

1,0 tonne = 1,000 kilogram = 16,67 bags