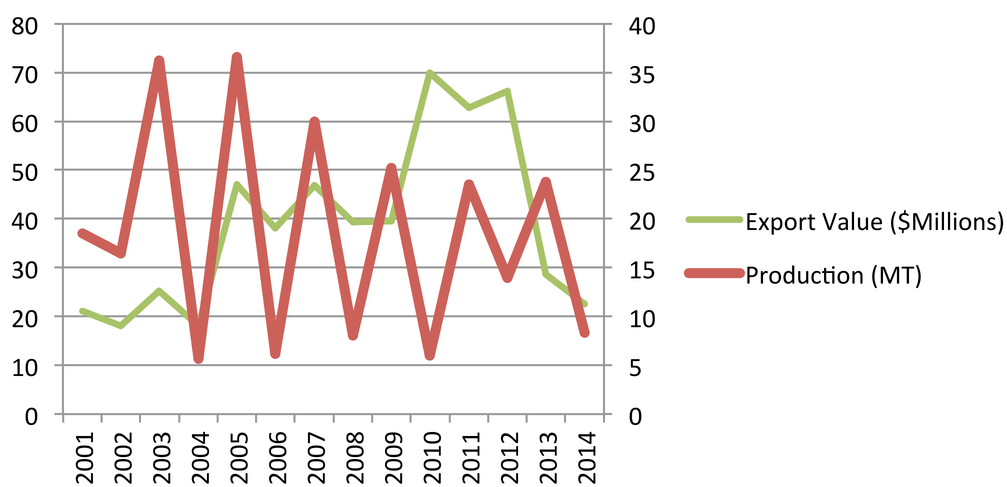
Burundi Coffee Value Chain at a Glance

Input Supply	Production	Wet Mills	Dry Mills	Export	Buyers
ISABU, CNAC, Intercafe, donors	600,000 small farms	191 CWS -77 public -97 private -17 coops	8 dry mills	3 major exporters	~35 specialty buyers; MNCs

Burundi Coffee Sector Performance



Export Profile

- 100% Arabica beans
- 65% exported as FWC
- 35% exported as washed coffee
- 5%-10% exported as "specialty" grade coffee

Regulation

- Current phase of liberalization began 2008
- ARFIC: state-managed regulatory authority
- Intercafe: private stakeholder organization

Barriers to upgrading

- Lack of key inputs (fertilizer, mulch, seedlings, extension services)
- Ineffective/partial implementation of minimum price
- Irregular supply and overcapacity among CWS
- Lack of finance -> Farmers typically sell to middlemen
- Farmers and CWS both lack direct access to buyers