Burundi Coffee Value Chain at a Glance

Input Supply
- ISABU, CNAC, Intercafe, donors

Production
- 600,000 small farms

Wet Mills
- 191 CWS
  - 77 public
  - 97 private
  - 17 coops

Dry Mills
- 8 dry mills

Export
- 3 major exporters

Buyers
- ~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