



September 2013

ORIGIN: TANZANIA

CBS&A Coffee Business Services & Academy, a Volcafe Initiative



Tanzanian coffees are as diverse as they come. There are several distinct (and distant) coffee growing areas, with both arabica and robusta on offer, from smallholders and estates alike. It's a small coffee origin on volume, but big on variety.

**Matthew Seaton, General Manager,
Taylor Winch Tanzania**

TANZANIA AT A GLANCE:

Population:
47.8 mio

GDP per capita:
\$609

Export share of GDP:
31.0%

Coffee share of exports:
2.0%

Coffee production:
1.0 mio bags

Number of coffee farms:
450,000

Population employed in coffee economy:
4.5 mio

(2012 data: World Bank, Tanzania Coffee Board, Volcafe)

OVERVIEW

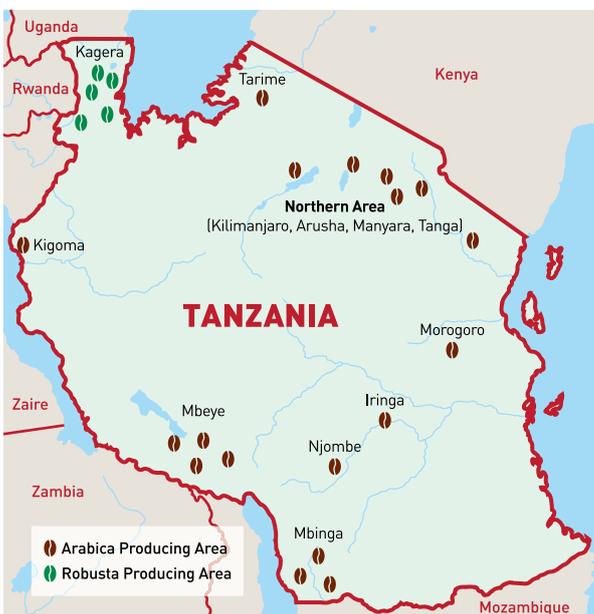
Tanzania is blessed with a rich coffee history and a wide range of distinct coffee producing areas. Arabica was first brought to Tanzania by missionaries in the 1870s and was the original home of the bourbon variety in East Africa, while robusta is indigenous to the Great Lakes region of Kagera in the West of Tanzania.

In the North, estates and smallholders alike grow arabica coffee on the fertile soils of Kilimanjaro and Mount Meru, as well as taking advantage of the outer slopes of the Ngorongoro crater. Smallholders also produce arabica on the shores of Lake Tanganyika in Kigoma and in the Southern Highlands, notably Mbeya and Ruvuma Regions. They use both home-processing techniques and central pulper units (CPUs) typically managed by groups of smallholder farmers. Finally, in Kagera, just West of Lake Victoria, the both unwashed arabicas and premium soft-cupping robustas are produced.

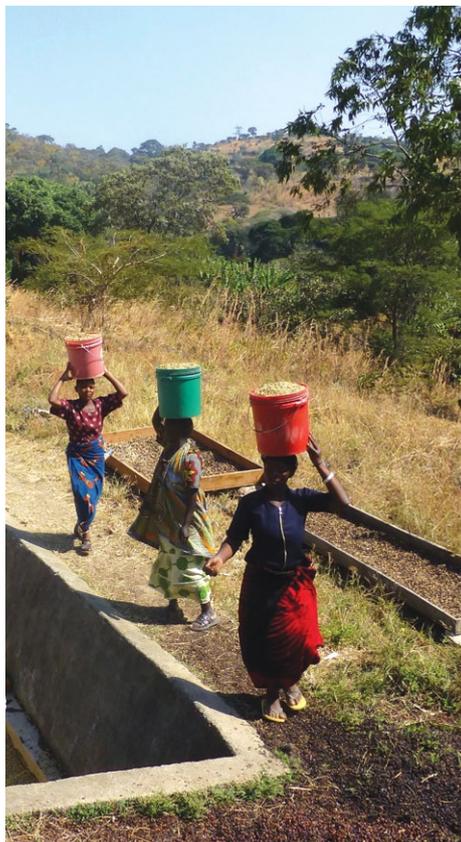
PROCESSING

While Tanzania offers some exceptional estate coffee, it is truly a country of smallholder production. Over 95% of Tanzania's coffee is grown on plots of less than two hectares and the estimated 450,000 smallholder coffee farms provide support and employment for over 4.5 million people, a staggering 9% of the total population. This gives rise to volatile production volumes as smallholder farmers tend to be more susceptible to climatic changes as well as on/off cycles.

The majority of smallholder coffee is "home-processed" coffee, where individual farmers or



small groups of farmers pulp, ferment and sundry their coffee using hand powered and locally crafted equipment. It is essentially a 'semi-washed' process. A small but growing portion of the crop is processed at small wet mills, typically owned and managed by farmer groups and private companies. The collecting of ripe cherry permits the production of high quality fully washed coffee.



CPU Southern Highlands

MARKETING

Tanzania markets most of its coffee through a central auction. Estates, farmer groups and private buyers of parchment and cherries have their product hulled, graded and warranted for auction by several commercial coffee dry mills. Catalogues are prepared by the Tanzania Coffee Board, an institution which still maintains an important central regulating role in the industry. Buyers receive the auction catalogue and samples a week before the sale date and carry out their own analysis on each and every lot before sitting down to a Thursday auction session. Coffees are released to buyers after full payment, and buyers are then free to blend and re-process for export to meet the requirements of their clientele.

A significant portion of the crop is sold through the Direct Export window – originally this was created to cater for top quality and otherwise special coffees (certifications), but in recent years most of the robusta crop has found its way to the overseas market via this channel, together with approximately 10% of the washed arabica production.

The diversity of distinct areas and methods of production provides for a rich complexity of cup profiles – bright citric acidity, dark chocolate and red berry flavours, and fruity sweetness best describe the arabica offerings – the robustas tend to be punchy, herbal, full bodied and sweet.

VOLCAFE IN TANZANIA

Taylor Winch (Tanzania) Ltd was registered as a coffee exporter in 1993 and quickly established itself as a premier exporter. The Rafiki (Coffee) Ltd. dry mill was built in 1997, originally to process parchment purchased in the field during the early days of coffee sector 'liberalization', later to serve estates, independent parchment coffee buyers and smallholder farmer groups as a commercial toll mill.

Both companies maintain close connections with farmers and indeed all coffee stakeholders across Tanzania. This collaboration has served the group well in sourcing coffees as well as in implementing sustainability and CSR projects in some remote areas of the country. Sustainably traded coffees have included UTZ certified, Café Practices and FLO certified.

A company managed warehouse facility in Dar-es-Salaam receives the green coffees from all corners of the country and it is here that they are upgraded, blended and stuffed into containers before delivery into the nearby port. ☕



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