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**COLOMBIAN COFFEE: A MARKETING STRATEGY BEYOND A BRAND AND
ITS IMPACT ON THE INTERNATIONAL MARKET**

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1. INTRODUCTION

Coffee is currently the most traded product in the world, after petroleum, and the most consumed beverage after water and tea (Pública et al., 2013). The final consumer is used to finding a multitude of bags of ground coffee in supermarkets, without knowing the real difference between each one. It is also common to associate countries such as Brazil, Kenya or Colombia, among many others, with this product, but without understanding in detail what type of coffee each country provides.

Colombia is much more than what a bio series about controversial characters can tell us, it is the country of “tinto”, one of the largest exporters of flowers in the world (Ruiz et al., 2023), the only South American country with access to two seas (Pacific Ocean and Caribbean Sea) (Calvachi,2021) , one of the most biodiverse countries in the world (Rangel, 2005), and not to mention that it is the birthplace of historic international artists, like: Shakira, Karol G or Gabriel Garcia Marquez.

Colombian coffee growing is a long and complex history that most end-consumers do not know or often no one has even tried to tell them. Colombia is one of the Top 3 list of coffee producing countries in the world (Andrés & Tomás, 2022) and is characterized by its smooth aroma and flavour. Colombia's natural landscape smells and tastes like coffee, and even some of its most recognized soap operas are based on coffee life. In fact, millions of Colombians live by and for coffee.

The coffee sector is large and it could be said that it is saturated. The execution of the marketing strategy for coffee brands is not easy, since a small number of brands have the majority of the market share. The tons of coffee that are exported daily are incredible and millions of agents are involved in the value chain. If we could see described what has had to happen for an ordinary person to be able to serve himself a cup of coffee in the morning, we would be impressed.

This research was created in order to go beyond a simple brand of coffee, to be able to describe in detail what has to happen in Colombia for the fruit of the coffee plant to provide that drink that has been so popular for so many years. In addition, to contribute data of great interest and unknown by the majority of the population. The trajectory of Colombian coffee has nothing more and nothing less than almost 2 centuries of history.

Despite all the effort of a country whose gross domestic product is based in three quarters in the primary sector and that coffee as a raw material has been the potential promoter of the creation of a national and international industry, all these benefits have not been shared equitably, affecting mainly those who put more effort, the farmer harvester.

Like any product on the market, Colombian coffee has lived on a constant roller coaster over the years, but despite its times of recession in the market cycle, it has managed to create a good name among everyone and possess a large number of virtues that fill it with strengths and competitive advantages among its competitors. It has even been echoed outside its own sector, thanks to all the customer action plans and business opportunities that its delegates have created.

The scientific documentation that will be provided throughout this paper will show the immense and exciting dedication behind this type of coffee. As a country that has worked side by side and with a holistic approach, Colombians have been the creators of as many innovative ideas as learning has been granted. And it is worthy of great recognition and growth among all its current and potential consumers, thanks to the ups and downs that have allowed those who

dedicate their lives to coffee to continue reinventing themselves and show the public that they can always go one step higher.

2. OBJECTIVES

This research is based on the hypothesis that Colombian coffee has great qualities that can differentiate it and boost it much more in its market. In order to analyse what happens in question from the first phase of the chain to the end of it, secondary research will be held, that aims to describe and understand in depth the theoretical background that surrounds Colombian coffee. Apart from that, a primary investigation will be made to support the data collected.

The **main objective** of this study is to demonstrate how the implementation of a powerful marketing strategy has been able to give added value to a product as widely consumed as coffee and how the different marketing mix variables that are around coffee of this type have made it well-recognized and well-repudiated among the end-consumer.

Specific objectives:

1. Analyze the impact of the product strategy on the perception of the brand equity of Colombian coffee.
2. Evaluate the influence of pricing strategies on the perception of quality and acceptance of Colombian coffee.
3. Investigate the effectiveness of distribution strategies, in macroeconomic terms, to reach the target group.
4. Examine the role of communication and promotion strategies in coffee brand building.
5. Analyze the market segmentation and positioning of Colombian coffee in different consumer segments.

After the scientific documentation on all the topics that encompass the history and strategies of Colombian coffee, different techniques of primary research will be carried out, such as:

1. Obtain testimonies from professionals of the sector to get first-hand information from different perspectives within the value chain.
2. Conduct quantitative research to identify which are the principal habits consumers have towards coffee consumption and how do they perceive Colombian coffee.

In order to meet all these objectives, it is necessary to carry out secondary research using as many bibliographic sources (articles, books, scientific papers) as possible. This will be the theoretical framework on which the document will be based and will allow both, the researcher and the reader, to orient themselves in the subject and understand in depth where the problem comes from and what is to be achieved when the final conclusions are described.

3. THEORETICAL FRAMEWORK

3.1 Colombian Coffee History

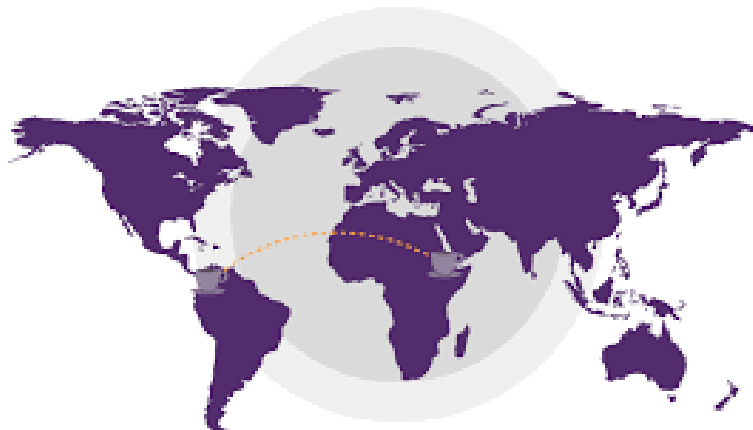
Coffee is a product that could be considered archaic, as its existence was already known before Christ, since we can find in the Old Testament that reference is made to some unique fruits very similar to those of coffee (Smith,1985). It has its origin in the mountains of Abyssinia, in Africa (present day Ethiopia), but were the Arabs who introduced the custom of consuming this beverage. They were the first to extract the beans, roast them, grind them and mix them with hot water, thus creating the most consumed infusion in the world (Romero, 2012).

Even so, coffee has followed a long process to reach the different Western countries, since its arrival in Europe dates to the 17th century by the hand of different European immigrants but were the Dutch who started with the cultivation and production in the botanical garden of Amsterdam (Mussatto,2011).

The rapid acceptance of coffee in the European culture by the vast majority of the population, generated the need for public spaces dedicated to its exclusive sale, which is why in the middle of the 17th century arrives in England, for the first time, what is now known as a “coffee shop”.

Coffee reached out Colombian territory at the beginning of the 18th century (GI, 2013), because different empires of the time, like the Spanish one in this case, followed and supplied their colonies to continue with the production, since their geographic conditions have been extremely favourable for a good production of coffee. However, it has been cultivated on a commercial scale for about 170 years.

FIGURE 1. The coffee trip to Colombia



Source: Google Images

There are several theories about who really introduced coffee in Colombia, but the oldest written source says that coffee seeds arrived in the country from the east, brought by the Jesuit priest *José Gumilla* from the Guyanas and passing through Venezuela, during his mission of “Santa Teresa de Tabajé” (Gumilla,1745), near the mouth of the Meta river, in Colombia, in the Orinoco (a river that runs through most of Venezuela and a little less of Colombia).

From 1850 onwards, coffee cultivation expanded towards the centre and west of Colombia, encompassing Cundinamarca, Antioquia and Caldas. This expansion is attributed to the priest **Francisco Romero** (Fonseca-García et al., 2014), who imposed the sowing of coffee as a penance on the inhabitants of Salazar de las Palmas (Norte de Santander). For this reason, this municipality is recognised as the cradle of coffee in Colombia.

The coffee industry began to be forged during the end of the 19th century, with a country that was politically and socially fragmented, where the figure of the “**Cacique**” is the connection of a hierarchical society between the peasantry working on the “*haciendas*” in rural areas and the bourgeoisie in urban ones (Palacios, 2002). Coffee was established in three areas of the country: Santander, Cundinamarca-Tolima, Antioquia and Caldas (see Figure 2). This business opportunity was the one that allowed Colombia to enter an international market, but where it already found competitors such as: Brazil, Venezuela and Costa Rica (Machado, 2001).

FIGURE 2. Colombian coffee growth between 1880 and 1930



Source: Google images

Colombia found itself with a great lack of capital for a necessary land connection between the coffee regions, so in the first decades of the 20th century, kilometric railroads were built to create a link with the waterways that circulated along the Magdalena River. This was the beginning of a powerful incentive for the economy and the agroindustrial situation of the coffee-growing country.

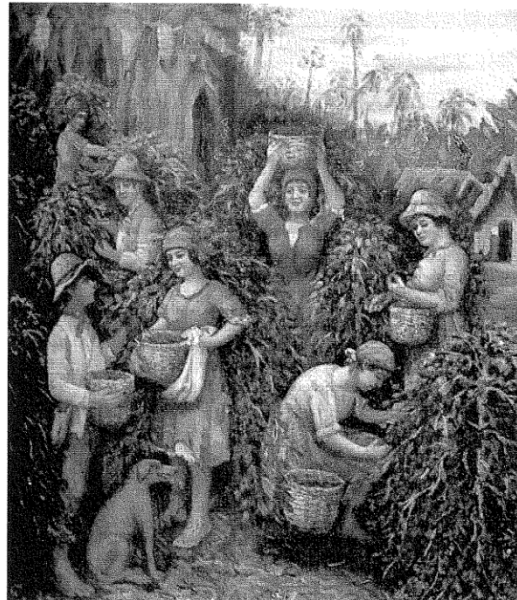
The key characters in the coffee process are the pickers, who are dedicated to harvesting the coffee cherry. The role of the “*Chapolera*” (see Figure 4 below), woman coffee picker, has been maintained in the tradition (Guzmán-Díaz et al., 2019), taking care of the coffee bean by hand. In addition, “*Chapola*” is also the name given to the small coffee bush. The “*Arriero*” (see Figure 3 below), responsible for transporting the harvested product, formerly on the back of a mule, is the star figure of the coffee landscape, which will be analyzed in depth in this document as it will be the brand image of Colombian coffee abroad.

FIGURE 3: “El arriero” in the coffee landscape



Source: Google images

FIGURE 4: “Chapoleras” oil painting



Source: *Historia de Antioquia* (Jorge Orlando Melo, 1988)

Coffee was here to stay, so the traders of the time became coffee growers and exporters, allowing Colombia to enter foreign trade with coffee. Much of the capital obtained over many years from other natural resources, such as tobacco, cotton, etc., was used by the capitalist landowners to transform their “haciendas” into powerful coffee producers. The speculation in the coffee business was so great that these landowners were willing to mortgage their properties and get into debt with foreign banks (Machado, 2001).

At the end of the 19th century, the “Thousand Days' War” (Meisel-Roca & Romero-Prieto, 2017) broke out, due to the differences between the two political sides that represented Colombia at the time: liberal and conservative (the ruling government). It has been the most violent armed conflict in the country's history. This was compounded by a fall in coffee prices on the international market, which mainly affected the economy of peasant families.

Years of tension and economic instability marked Colombian political and socio-economical context, but in 1927 the community and village associations involved in coffee production decided to organise themselves, giving birth to the "**National Federation of Colombian Coffee Growers**” (FNCC) (Medina, 2017). This institution represents coffee producers both nationally and internationally and is dedicated, on a daily basis, to improving the life quality of national coffee growers.

In 1938, at the request of the General Manager of the FNCC, Manuel Mejia, founded the "National Coffee Research Center” (**Cenicafé**), during the “Ninth National Congress of Coffee Growers”. With the creation of this department, it was possible to consolidate a team of national scientists that have made important contributions in science and technology. Among its great achievements are the development of technologies to make the process of transforming the fruits into “dry parchment coffee” more efficient, which is the way in which this product is marketed internally in Colombia (Oliveros-Tascón & Sanz-Uribe, 2011), and the research on genetic resistance to coffee rust (Gómez, 2005).

3.2 Marketing Mix

According to Kotler (2000, p. 74), ‘the marketing mix is the set of marketing tools that companies use to achieve their business objectives in relation to a target audience’. This theory is divided into the 4P’s:

- **Product:** these are the goods or services that the company offer to its clients.
- **Price:** the value that the customers have to pay for obtaining the product.
- **Place:** is how these products are distributed, in order to reach the customers.
- **Promotion:** the communication techniques that are carried out to tell the transmit the customers the benefits of the products and the difference among the competitors.

In order to give a general view of how Colombian coffee is in the international market, it is necessary to describe these elements in chronological order, since this way cause-effect relationships can be established and final conclusions can be given that will add relevance to the topic of study.

3.2.1 The Product

The coffee produced in Colombia is distinguished from the rest by the added value given by its geographical origin and its sustainable production system. Millions of families are dedicated to its cultivation, working in the coffee farms from the different territories of the country, contributing significantly to the socio-economic context. Colombian coffee is attributed a high quality for its mild flavour, but intense aroma, as well as a balanced body, that is to say, it will provide a consistent texture to the consumer and a high acidity, which is the sensation it will produce in the palate of whoever drinks it (Puerta, 2013).

3.2.1.1 Species raised

Coffee is not something simple and singular, since it gives its name to dozens of species and varieties of plants, with different shapes, sizes and consequently flavours. The coffee plant belongs to the rubiaceae family, specifically to the *Coffea L.* genus (FJ, 1986), within which we find a variety of more than 70 species (Mussatto et al., 2011), but the one that is grown in Colombia is the “**Arabica**” variety (see Table 1 below). In contrast, the other species, apart from this, that is more relevant in the international market is known as “**Robusta**” (see Table 1 below), which is the competitor of “Arabica” and is raised primarily in Brazil (major coffee producer worldwide).

TABLE 1: Differences between

“ <i>Coffea Arabica L.</i> ”	“ <i>Coffea Canephora</i> ” (Robusta)
It is characterized by its mild and aromatic flavour.	It produces a beverage with a high caffeine content, intense and more acidic flavour.
Between the 60-70 % of worldwide production is due to this category (Lebailly et al., 1999).	A quarter of the world's coffee production relies on it (Rojo, 2022).
Has higher production costs, because is more sensitive to climatic conditions and pests, such as coffee leaf rust (CLR) and berry (CBD) diseases (Van Der Vossen et al., 2015)	Its competitive advantage is that it is considerably more resistant to pests (Guambi et al., 2018).
Is a “tetraploid” species (Pinto-Maglio, 2006) (it has four complete sets of chromosomes in each cell of its organism) and an autogenous plant (i.e. fertilises itself)	It is a “diploid” species (Herrera et al., 2002) (each cell in its organism has two complete sets of chromosomes) and is self-sterile (it requires pollen from other plants for fertilisation)
Its cultivation now extends throughout: South America, Central and Eastern Africa, and in Asian countries such as India and Indonesia (D et al., 2014).	Its cultivation spread to Central and West Africa, throughout Southeast Asia and some American coffee-growing areas, such as Ecuador and Brazil (Napoleon, 2015).
Is a sizable shrub, reaching approximately 5 meters in height, characterized by its glossy, dark green oval leaves and its fruit contains two flattened seeds (Jimenez,2014).	It is a robust plant with a shallow root system that can grow up to 10 metres high. Its fruit has a rounded shape, in comparison with Arabica’s one (Pola et al., 2017).



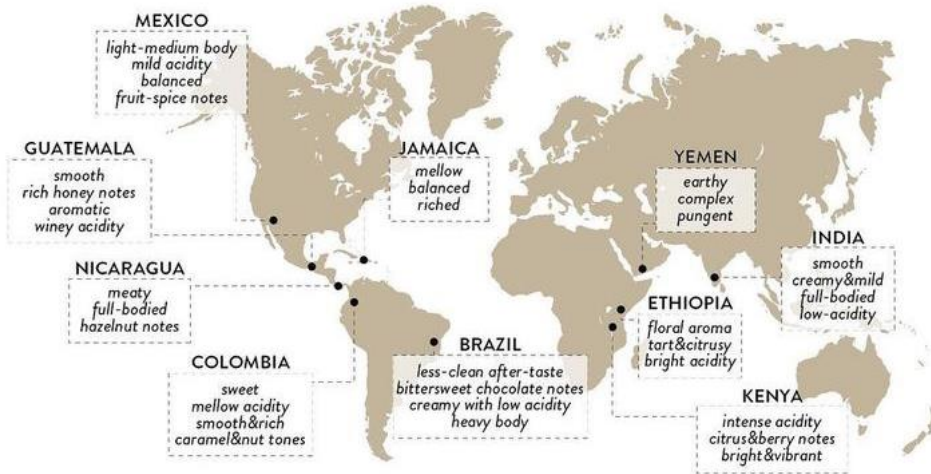
<p align="center">FIGURE 5. Appearance of “Coffea Arabica”</p>  <p align="center">Source: Google Images</p>	<p align="center">FIGURE 6. Arabica’s vs. Robusta’s coffee bean</p>  <p align="center">Source: Nestlé Bonka</p>
<p>It requires a period of 7-9 months to fully ripen (MR et al., 1994).</p>	<p>It requires a period of up to 11 months to fully ripen (Victoria, 2022).</p>

FIGURE 7. Coffee Regional Flavour Profiles



Source: Google Images

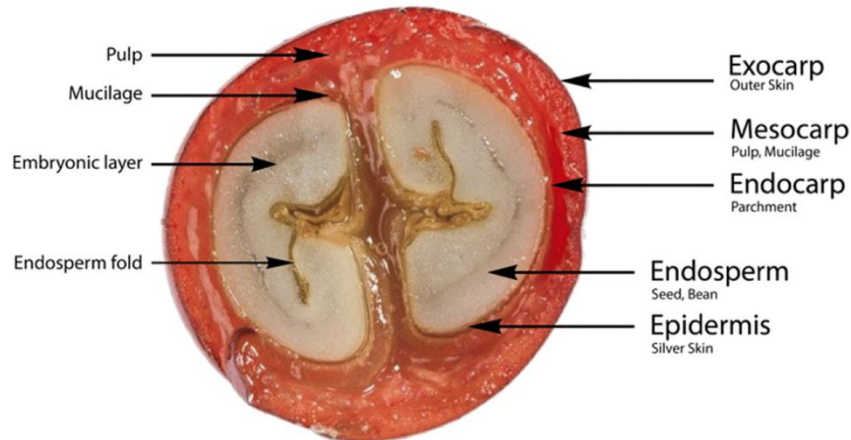
3.2.1.2 Productive process

The Colombian coffee production value chain (Parente-Laverde, 2020) is a long process involving numerous professionals from the primary to the tertiary sector, to reach the form in which it is demanded by the final consumer. A main characteristic that elevates coffee production in Colombia to another level is its artisanal process of picking, which comes from a long tradition passed down from parents to children, which is one of the reasons why Colombian coffee is recognised for its high quality worldwide.

First, the coffee cherries are harvested individually from the plant, carefully selecting the ripest and best quality beans, minimising the possibility of picking green beans that could

give a more bitter taste to the coffee. Secondly, the harvested grains are subjected to what is called “**beneficio húmedo**” (Ignacio, 2014), which consists in extracting the surface layers of the endosperm (see Figure 9 below) by means of a pulping machine and **fermentation** of the fruit without pulp, so that the mucilage (the viscous and sugary part) is naturally released.

FIGURE 8: Parts of the coffee bean



Source: Google images

After that, the coffee beans are washed with clean water numerous times to remove any debris generated and left to dry in the sun quickly to avoid decomposition, from one to two weeks. Finally, the “**café pergamino**” (Puerta, 2013) (the endosperm covered by the silverskin) has been obtained, which will be stored in the typical sacks (protecting it from humidity) and transported to the coffee growers' cooperatives to be sold.

Before the coffee can be roasted, the “café pergamino” will have to go through a “**threshing process**” (Lopez-Fontal, 1999), which consists of removing the “epidermis” that surrounds the seed to obtain “**café almendra**”. A careful process of sorting by size, colour and density will be followed to keep only the green coffee. Now it is time to move on to the roasting process, in which the coffee beans will be subjected to more than 200°C for up to 20 minutes, which will allow all the chemical compounds that are responsible for the sensory experience that the beverage will provide to those who consume it to be obtained.

The method of preparation that is used (generally hot water will be infused with the ground coffee), will allow these chemical compounds to be exalted, which will be submitted to a test by a professional taster, who will define different quality factors of this coffee, such as humidity, colour or aroma, providing the consumer with an unforgettable sensorial experience.

The three most common methods in modern society to prepare the coffee beverage are: **Boiling**, like the *Turkish coffee brewer* (Solano, 2015); **Infusion**; and **Pressure**, like the *French press* (Brommer et al., 2011) or the *Italian coffee machine*. In addition, it is becoming more and more common to develop innovative machinery to be able to prepare certain styles of coffee, like the *Espresso machines* used in coffee shops, which have a built-in steamer that can generate foam in the milk and thus be able to prepare, for example, “Cappuccino” (Italian style of coffee with milk).

Unfortunately, this manual production method presents a great disadvantage to the competition, as it slows down the process compared to Brazil and other Arab countries that use

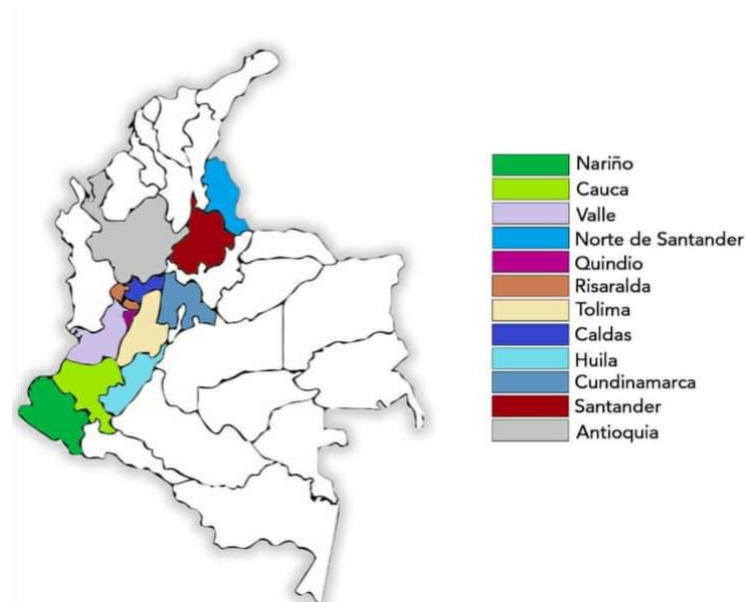
harvesting technologies (Alberto, 2021), making their product more profitable, lower cost and highly competitive, as they have been able to achieve an economy of scale, but opening the debate of whether quantity is better than quality.

3.2.1.3 Geographical and Climatic conditions

As described in this document, the taste of coffee depends on multiple factors, not only in its system of production used and the preparation method, but also in the soil in which it is grown and the climatic conditions under which it matures. The denomination of origin is crucial for this coffee to differentiate it from the rest, as it is its different varieties of flavours that make it so exquisite and so well known all over the world today.

The geographical size of Colombia encompasses approximately 3.3 million hectares, of which 914 thousand are cultivated with coffee, in 588 municipalities (Mesa Gomez & Zuluaga Tabares, 2017) of different departments (see Figure 10 below) in Colombia. This distribution has allowed the consolidation of different coffee-producing zones that yield various coffee profiles throughout the year. This is because coffee growing is somewhat special in terms of climate, soil and altitude. In fact, depending on the area where the coffee grows, different flavours will be obtained, now known as “**specialty coffees**”, which delight the drinker with very different flavour notes, as each coffee farm treats it in very different ways, according to its cultural traditions and techniques.

FIGURE 9: Colombian Coffee-growing regions



Source: Google images

Coffee cultivation is processed at an ambient temperature of between 18 to 22°C. In Colombia, there are two flowering periods: from 1st May to 31st October, which coincides with the harvest of the first semester, and from 1st November to 30th April, corresponding to the harvest of the second semester (VH et al., 2013). The coffee plant grows at a very high altitude above sea level. In the Colombian mountains, coffee grows at an altitude of between 1200 to 1850 m, in contrast to other producing countries, such as Brazil that cultivates coffee below 1100 m, or Central America that grows from 700 to below 1700 m (GI,1999).

It has been demonstrated that the higher the altitude at which the coffee is planted, the lower the temperature, so the smaller number of pests that attack the fruit, which implies a lower use of insecticides and consequently, a more ecological and healthy production (a clear differentiation and advantage of Colombian coffee over the rest). However, no differences have been found in coffee performance according to altitude, so that no correlation can be established between the altitude at which the coffee is grown and the quality of the coffee beverage (GI,1999).

3.2.1.4 Properties and Benefits

Coffee is one of the most widely consumed commodities in the world, so it has been of great interest to study its nutritional and functional contribution to the organisms that consume it. It is now known that this agri-food product has several bioactivities, such as **antioxidant, anticarcinogenic and antimutagenic properties** (Gotteland & De Pablo, 2007).

These antioxidants could be found in the green coffee beans, such as (Naranjo et al., 2011): phenolic acids, polyphenols and alkaloids, particularly ellagic, caffeic and chlorogenic phenolic acids, which are responsible for providing those who consume them with the properties and benefits mentioned above. In addition, the final temperature of the roasting process would be crucial for the colour and the organoleptic properties found in the distinct coffee qualities.

In the research on this subject carried out specifically for Colombian coffee (Fonseca-García et al., 2011), it was discovered that speciality coffees (coffees produced in certain regions of the country and processed with exclusive techniques) from the Norte de Santander area the ones that provide the best antioxidant properties among all the varieties produced in the country, as they are not mixed with other components or other coffees before reaching the consumer, as well as following a much more environmentally responsible production (which is why these coffees have a greater added value in the market).

3.2.1.5 Specialty coffees

“A coffee is considered special when it is perceived and valued by consumers as having some characteristic which differentiates it from conventional coffees, for which they are willing to pay a higher price. In order for such a coffee to be special, the higher value they are willing to pay for it must represent a benefit for the producer “(FNC, 2017c). Speciality coffee is characterised by meeting criteria and requirements that differentiate it from the traditional market, such as cup quality, sustainability and traceability throughout the value chain.

According to the National Federation of Coffee Growers (2018), there are four main groups of speciality coffees:

1. **Sustainable coffee:** characterised by practices that promote the conservation of biodiversity and the environment, complying with codes of conduct.
2. **Coffees of origin:** Varieties with specific aroma and flavour characteristics according to the region where they are grown.
3. **Preparation coffees:** Distinguished by their size and shape, designed to meet the needs of the consumer.

4. **Organic coffees:** They guarantee the absence of fungicides, herbicides, insecticides and artificial fertilisers.

The specialty coffee market is booming, growing annually at over 25% (Cluster Development, 2016). It is a very prominent trend in the United States, but the trend is moving towards many more international markets, as demand-driven changes and motivations in the consumers' behaviour are becoming clear, who are moving from consuming coffee merely for its stimulant compounds, but to activate a sensory pleasure apart from other social and environmental factors (Manuel Diaz, 2013).

Although Colombia meets multiple requirements for classifying it as a special coffee, because they have demonstrated they possess the "know-how" to produce it, but its global production is still based mostly on green coffee, as tradition has dictated it for centuries. Indonesia, the fourth largest coffee producer in the world, is in turn another of the countries that is focusing its production most on this type of coffee (Gualdron et al., 2019), so it could be considered a powerful competitor to Colombia or, instead, cooperate commercially to lead the specialty coffee niche in the world.

3.2.2 *The Price*

Colombian coffee is well positioned in the world market for its certified quality and sustainable processes, so a premium is always added to its competitive price. But the inequality in its distribution is overwhelming; in fact, in 2013, 10 % of the country's producers took 80 % of the turnover (Steiner et al., 2015). Furthermore, the Colombian coffee industry has been in crisis since the end of the 1990s, with the elimination of the International "**Coffee Agreement Quota Pact**" in 1988 liberalised prices, which were then regulated by the private sector and led to highly volatile prices on the international market that have even fallen below costs.

One of the objectives with the creation of FNCC was to ensure a fair price for producers and guaranteeing the purchase of all coffee offered, as long as it meets the established quality standards. It is common for many market players and private exporters to use the price published every day by the FNCC as a reference to calculate their own prices ("Ensayos De Economía Cafetera," 2021). This mechanism, under free market conditions, helps producers to obtain a fair price.

The 21st century brought with it a rise in international prices that has been growing steadily over the last two decades, but this doesn't mean that the producers earn higher turnover. Coffee has not been spared from this influence on prices, as they have been affected by **high volatility** (see Figure 11 below) **due to** (Cano-Sánchez et al., 2012): climate change (El Niño and La Niña phenomena), as the law of supply and demand plays a major role: the high cost of petroleum, which has a direct impact on the price of fuel, transport and fertilisers.

One of the trends over the last ten years has been **coffee certification**. This trend has emerged, as in other markets, as a response to consumer concerns about the effects on poverty, environmental destruction and social injustice (i.e. Corporate Social Responsibility). Producers that have adopted sustainability standards can benefit from better trading conditions and the value of preserving the environment. However, this practice does not currently provide the same benefits and advantages to small-scale producers compared to large-scale production.

FIGURE 10: The past 10 years of arabica coffee futures base prices on the International Coffee Exchange (ICE). Prices shown in USD



Source: Macrotrends

3.2.2.1 Internal Pricing Policy

Colombia has been reforming its internal pricing policy to try to avoid economic instability and the lack of equity in the remuneration of the thousands of coffee growers in the country. Despite these efforts, inequity and the economic crisis in the sector have been unavoidable. This policy dates back to the mid-20th century (Steiner et al., 2015c), where the internal price of coffee was established by the government along with the coffee growers' guild, considering the international market and various macroeconomic factors.

In case of losses, the **National Coffee Fund** (FNC) (Leibovich, 1988), created in 1940 and managed by FNCC, would be used as a resource. This fund collects part of the income from international sales and taxes on the coffee industry activity in Colombia. Between 1995 and 2001, the internal price was adjusted solely based on international market fluctuations. The government would only intervene to keep producers' incomes stable by creating a **support price**, which set the minimum limit for purchasing coffee. In case of losses, the FNC was still available.

Finally, this support price was eliminated at the beginning of the 21st century because the FNC entered a crisis, so the internal coffee prices in Colombia currently depend on international prices. Even so, the government uses resources from the national budget to provide subsidies to coffee producers during periods of low international prices, negotiating with the coffee growers' guild rather than in Congress.

The economic model in many resource-rich countries is based on the export of natural resources, making them highly dependent on international price setting for products, rather than investing in building a strong domestic value chain (Parente-Laverde, 2020). This is the case of Colombia, which currently coffee production is not giving the same growth to the economy but is more a socio-cultural tradition.

3.3 The Place

Coffee goes through a long chain of intermediaries until it reaches the end-consumer. As analyzed in this document, Colombian coffee is first produced and processed on national territory and then sold by farmers to traders. It is usually roasted and ground by the brands that market it. As it is a product in great demand in foreign markets, the exportations will be made by sea or air. Once it arrives to the country where it is going to be sold, the different bags of Colombian coffee (the format would be roasted and ground) will be sold through the most strategic points of sale due to their proximity to the potential consumer (i.e. supermarkets and physical shops of the brands that market it.).

During the 1980s, the demand for Colombian coffee reached a turning point, as it began to be associated with high quality, and the Café de Colombia® and Juan Valdez® brands began to be sold through premium and gourmet channels (Parente, 2017b). But with the liberalisation of prices in the market during the new millennium, competition with other lower priced coffees has greatly affected the Colombian coffee industry, because due to the way they do things, they cannot lower their prices to be more competitive. Even so, there is a tendency for Colombian origin coffee to be commercialized in shops and coffee shops, like ‘Starbucks’ (Chamorro,2019) or ‘Juan Valdez’.

3.3.1 International market impact

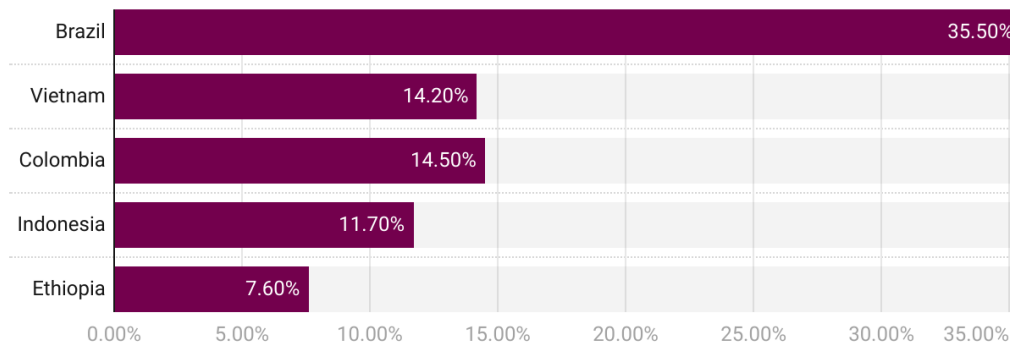
Between the 1980s and the first decade of the 2000s, coffee accounted for between 1-1.5% of world GDP (Pérez, 2013). Exports of coffee are still the main basis of commercialisation in the world market (Losada et al., 2020): according to the DANE (National Administrative Department of Statistics), during 2017, the participation of coffee in the Colombian agricultural GDP was 12.1%, and in the national GDP it was 0.8%.

Coffee exports in Colombia have been managed by two agents (Lanzetta,1985): first, the FNCC, which markets approximately 60% of the annual exports of the national industry. Additionally, the federation works for the interests of the producers and continuously seeks to enter new markets. Specifically, the FNCC exports to the European and Japanese markets; the remaining 40% is managed by private exporters who mainly export to the United States and, to a lesser extent, to Europe.

Colombia has been in second place for decades during the last century, but **Vietnam** in recent years has overtaken it and positioned itself below it (Rizzuto & Rosales, 2014). Vietnam’s production is mainly centered on “Robusta” varieties. Its rise as the world's second largest coffee producer occurred in less than 30 years, which is attributed to an organizational scheme based on numerous cooperatives spread across the country and a production strategy aimed at combating poverty (Alberto, 2021).

Above both, the main exporting country is **Brazil**, which since the last century has been responsible for more than a quarter of the world's production alone (Rojo, 2022b). Its advantage lies in a favourable climate that promotes good production and the large territorial extension of the country, which allows larger cultivation areas, facilitating the use of low-cost techniques and the exploitation of economies of scale.

FIGURE 11. Percentage share of major coffee producing countries worldwide in 2023



Source: Kundan (2023)

3.4 Promotional Strategy

3.4.1 The emergence of Juan Valdez

Coffee on its own sounds like a single drink to the uninitiated, but if you do a little research, you will realise that it is not that simple and regular. This can be devastating for a brand, as it will not be easy to position itself if they have to deal with threat of substitution (Porter, 1980). Even so, a unique and unequalled promotional strategy has been developed for Colombian coffee in the world. It is not only its quality, but also how a denomination of origin encompasses more than just a brand of coffee in a supermarket.

The 1930s began and the FNCC's main objective was to make inroads abroad. Initially, simple inscriptions were used on the exported bags with the legend 'Café de Colombia' (see Figure 13 below) and, later, a labelling system was implemented for products packaged for the final consumer. These products were processed by international threshing machines, not by the federation, but maintained the 'Café de Colombia' certification (Parente, 2017).

FIGURE 12: Typical Coffee selling sacks in Colombia



Source: Google Images

The FNCC's target group in the foreign market was mainly the United States, but despite its early efforts to position Colombian coffee in the minds of the American consumer, it was not enough. In fact, (Gracia,2011): “Towards the end of the 1950s only 4% of U.S. consumers believed Colombian coffee was the best in the world”. Thus, the FNCC had to reinvent its promotional strategy beyond promoting the designation of origin, as this could be eye-catching but not so powerful as to generate the intention to buy on a large scale.

In 1960 there was a global oversupply of coffee, which created a crisis and consequently, the need to develop a strategy to differentiate Colombian coffee on the international market from beans from other countries (Trillos,2012), because referring to high quality coffee and sustainable practice was not enough to position Colombian coffee among customers, as prices are more powerful in influencing the purchase intention of the potential consumer. That's why the FNCC created *Juan Valdez* as their brand image.

3.4.2 Creation of Juan Valdez

In **1959**, the idea that would lead to the conception of the coffee-growing country as one of the best coffee producers in the world was born. Together, with the collaboration of the New York marketing communications agency, **Doyle Dane Bernbach** (Rengifo et al,2007), Juan Valdez and his mule ‘Conchita’ were introduced to the world in 1961 in the mountains of Colombia, certifying 100% Colombian coffee to this day with their logo printed on any packaging containing coffee of Colombian origin.

FIGURE 13: Creation of first Juan Valdez' Logo



Source: www.juanvaldez.com

The first task was to find the model Colombian coffee farmer, in person, who would ‘symbolize and represent’ the more than 500,000 coffee farmers whose lives depended on coffee. As a result, was born the first JUAN VALDEZ, embodied curiously not by a Colombian, but by a Cuban of Spanish origin named José Duval (see Figure 15 below). His first appearances took place in the streets of New York, dressed in the typical costume of a coffee farmer: espadrilles, a “poncho” and a hat; accompanied by his familiar and faithful travelling companion, ‘Conchita’, a mule that almost always appears at his side carrying two sacks of coffee and which, in its iconic form, is associated with the Andes mountains on the background (Pachón & Pachón, 2003).

FIGURE 14: The first Juan Valdez



Source: Google Images

Although it was initially intended to show the image of a coffee family composed of a coffee farmer, his wife and son, it was determined that managing three characters could be confusing for consumers. Therefore, a single character was chosen, whose name was strategically selected to represent, on the one hand, the Latin essence of the country and, in addition, to be easy to pronounce for English-speaking consumers, who represented most of the target market for national coffee production (Trillos, 2012).

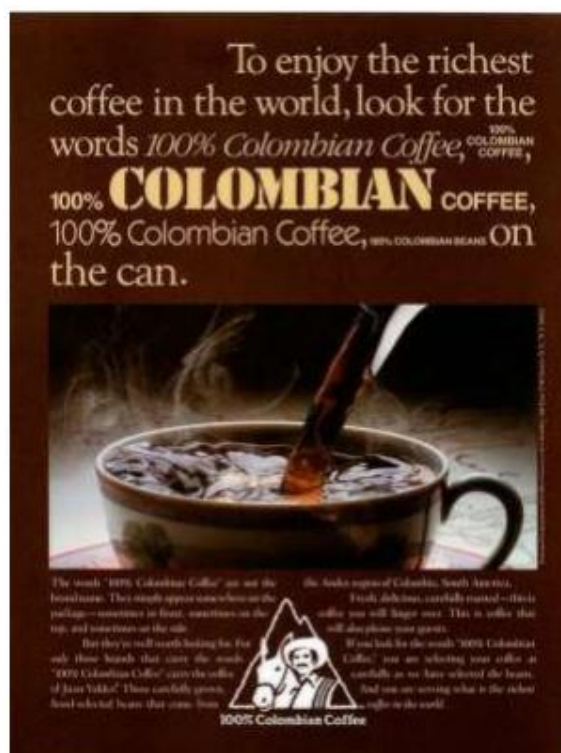
Initially, there were two versions of the Juan Valdez logo: the US version, labelled “100% Colombian Coffee”, and an international version, labelled in Spanish “Café de Colombia”. However, in 1995, in an effort to globalise the brand, the Federation decided to eliminate the English version of the logo. Recent advertising programmes, including multinational sports sponsorships and other international outreach campaigns, have shown that unifying a common logo across borders would generate greater awareness, thus minimising confusion among consumers (Araya-Leandro, 2019).

3.4.3 Promotional campaigns

Since the 80s, a multitude of advertising campaigns have been carried out to improve the image of Colombian coffee and contributed very positively to the recognition and positioning of the character Juan Valdez in the international market. Although these campaigns were mainly aimed at the North American market, those very Colombian characteristics were not lost, but on the contrary, they became the strength of the **brand association** (i.e. specific features that consumers associate a brand in their minds with) (Cruz, 2012).

These campaigns are being launched in different formats: brochures (see Figure 16 below), TV ads and radio commercials. One of the most outstanding ones was in 1985, when a TV commercial was launched for American television in which Juan Valdez is brought to life. He and his mule Conchita work daily in the Andean mountains of Colombia picking “the richest coffee in Colombia” so that every morning American citizens can enjoy “the richest coffee in America” in their homes.

FIGURE 15. Juan Valdez’ promotional campaign: “SYMBOL” 1982



Source: Cruz (2012)

Juan Valdez and his mule Conchita have been present in Hollywood for more than 30 years in television advertisements for Colombian coffee and have also made the leap to the big screen (Rengifo et al, 2007): His first appearance in cinema was in the film *Bruce Almighty* in 2003 (see Figure 17 below), starring Jim Carrey and Jennifer Aniston. Jim Carrey was the precursor of the idea, since he is a great coffee fan, and the FNCC took advantage of the opportunity to revive the image of Colombian coffee in the world, especially in the United States.

FIGURE 16. Juan Valdez scene in “Bruce Almighty”



Source: *Bruce Almighty* (2003)

The film was a great advertising enhancer for the brand image of Colombian coffee in the 21st century. In total, 14 million dollars were allocated to finance this campaign. Juan Valdez and Conchita have continued to appear in various well-known magazines in the United States, like *People* and *Rolling Stone*. Something very notable was when both characters crossed the red carpet (see Figure 18 below) at the film's premiere in Los Angeles (California).

FIGURE 17. Juan Valdez and his mule ‘Conchita’ crossed the red carpet

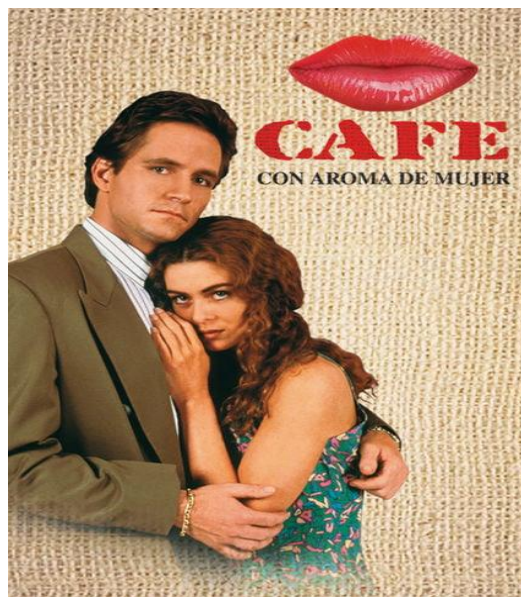


Source: Google Images

Moreover, the promotion of the coffee-growing country is not limited to Juan Valdez or the United States, but the efforts to promote its coffee have been echoed in the rest of the Spanish-speaking countries. A good example is the creation of the novel *Café con aroma de mujer* (1994), written by Fernando Gaitán and produced by RCN television (Radio Cadena Nacional; Colombian open TV channel) (León et al., 2016), whose main theme is the love story of a coffee picker and the owner of the “hacienda cafetera” where she works.

Beyond a melodrama, it is remarkable the way of influencing the **formation of positive attitudes** towards Colombian coffee culture on the foreign spectator, wanting to go beyond the prejudices created by other types of bio series. A re-adaptation of the novel was made in 2021, which has reached numerous countries through the streaming platform “Netflix”, what has allowed to continue strengthening the great relationship between coffee and Colombia.

FIGURE 18: Original version's cover



Source: Google images

FIGURE 19: Readapted version's cover



Source: Google images

3.4.4 Creation of Juan Valdez' brand

With the arrival of the 21st century, the FNCC wants to materialise the dream of making the work of Colombian coffee growers and the quality of Colombian coffee more visible. That is why on 14th December 2002, the first Juan Valdez physical shop opened its doors in the international airport “El Dorado” (Bogotá, Colombia) (*Nuestra Historia – Juan Valdez*, 2023). To manage the shops, the FNCC created **Procafecol S.A.** (Promotora de Cafe Colombiano) in the same year (Rey & Ordoñez, 2016). The main objective of creating this brand and its shops is to generate added value for all Colombian coffee growers.

In 2005, Procafecol S.A. began its global expansion process. “The Juan Valdez coffee shop business unit consolidated its presence in Colombia, the United States and Spain during 2007” (Procafecol, 2007, p.7). This business model seeks to link customers to the origins of Colombian coffee growing and to transmit, through the Juan Valdez shop experience, the values, dedication, secrets of the best coffee in the world and the essence of the hard work required to produce it.

In Juan Valdez, they have understood the speed at which the market is changing today, so they have implemented various digital marketing strategies to retain customers: a loyalty programme called ‘**Amigos Juan Valdez**’ (Villamizar, 2017) which consists of accumulating points according to purchases made in their shops and obtaining a series of benefits, such as gift products, etc. In addition, they have created a website, which has a lot of interesting content about the brand, as well as the trade of its products in physical points of sale and Ecommerce platforms.

4. METHODOLOGY: PRIMARY RESEARCH

After all the bibliographic documentation that has given an idea of the marketing strategy that has been implemented since the beginning in the Colombian coffee industry and its impact on the international market, a posteriori research has been carried out, both **qualitative and quantitative**, to reinforce these sources and to be able to verify the hypotheses and objectives that were established at the beginning of this project, as well as to allow conclusions to be drawn from this research and recommendations to the different strategies that have been implemented historically, as well as those that have not been found in the marketing strategy and can be an important improvement.

4.1 Qualitative research

Three **in-depth interviews** were conducted, lasting approximately 30 minutes each, with different professionals of the sector, in which the central topic was coffee of Colombian origin, but which, depending on their speciality, went into detail in different areas addressing both their experiences and contribution to the sector, problems that they have verified in their work and contributions/recommendations to improve or reinforce the image of Colombian coffee both inside and outside of Colombia.

4.1.1 Professional Coffee Taster

This interview (see Annex 1) is made to a professional Coffee Taster who has dedicated his entire life to the coffee industry between Europe and Colombia. He began the interview introducing his professional profile and putting his work into context:

"I've been working in the coffee sector for about 40 years, for the Federation of Coffee Growers of Colombia, which is an entity that brings together coffee farmers, looking after them, let's say the well-being of the coffee growers, selling the coffee in the market and trying to get the possible highest price".

As the interview progresses, we delve much deeper into what the **work of a Coffee Taster consists on**, specifically a Coffee Taster who works for the 'National Federation of coffee growers of Colombia in its European headquarters in Amsterdam, and what criteria are required for a coffee to be certified as Colombian:

"So those controls are very strict because the quality of Colombian coffee has a good reputation, due to its smoothness and delicacy. So, if a coffee with different characteristics is sold in the market, that would be detrimental to the entire image of Colombian coffee".

The taster is the one who analyzes the profile of the different samples received by the different brands that want to have the '**Juan Valdez logo**' on their packaging. To do this, the taster, after an extensive process of theoretical and empirical learning, and despite the fact that it is an analysis biased by the opinion of the taster, will be able to generate a report of said samples and give his approval (or not) of whether it deserves to carry the **Colombian coffee certificate**.

According to the interviewee, in this report a score will be given to a breakdown of aspects observed during the sensory experience that the said cup has provided to the taster, such

as: smoothness, acidity, humidity and texture. The score for this coffee to be approved by the FNCC must be greater than 80 out of 100 and brands will have to undergo through a quarterly review of their samples to remain certified.

To conclude the interview and be able to obtain a contribution far beyond theory to this project, the taster is asked to explain **which factors may influence in the flavour of a cup of coffee** beyond its designation of origin and production process:

"It's a good thing you touched on that point. I can have the best product in the world and I can roast it perfectly, I buy it fresh, I take care of it and if at the end I has not washed the machine, for example at night it is leaves dirty, as happened to me on one occasion when a Colombian president came to Spain".

To sum it up, the taster establishes that the **coffee preparation method** is a crucial agent in the final product that can be provided to the consumer, mentioning the figure of the '**Barista**', who has trained his skill in the preparation that must be carried out, depending on the type of coffee you want to consume, so the coffee preparation methods become somewhat more complex than is believed.

4.1.2 Owner of coffee "Las Margaritas"

The following interview (see Annex 2) is conducted with a young Colombian who decides to venture into the coffee industry by creating his own brand of Colombian coffee, "Las Margaritas". To contextualize his decision, he begun the interview by describing the reason why he decides to create a brand of this type in a country like Spain:

"My dad owns a farm that produces around 4500 arabica trees and the overseer of the farm was going to leave it because he said it wasn't profitable. So, it surprised me how couldn't it be profitable if the coffee pound is sold for €1.50- 2€. So, the thing is that I started to do the math and I was freaking out. That's why, I decided to dedicate my life to coffee".

The prevailing topic of this interview is the **pricing strategy** that rules Colombian coffee. It is explained that since it is a 'commodity', it is regulated by the stock market's fluctuations. Furthermore, the interviewee showed to be a clear activist against the poor distribution of goods in his country, specifically in favour of small coffee producers in rural areas of Colombia.

"I started to understand that people who buy it, (the government, the cooperatives, the federation) take all the coffee out of the country in green, which is very harmful for the Colombian economy. Did you know what means to take green coffee out of Colombia? 99% of the exportations are green".

The consequence that this practice has on the positioning of Colombian coffee is that the good reputation of a good coffee is attributed only to those who roast it and market it in their target market, so Colombian coffee stops being recognized without the need of a singular brand. In fact, the most affected are the coffee growers, who are the first agent in the value chain and thanks to whom the raw material can reach the next stage.

Colombian coffee has been one of the pioneers in filling the market niche in terms of 'specialty coffees', which is one of the motivations that encourage this entrepreneur to maintain a sustainable and demanding practice with his environment:

“Due to the people who had a demanding palate and who like coffee a lot, was created the 'Specialty Coffee Association' (SCA), which is an organization that governs the grain physically, but also the sensory part. Today, specialty coffee occupies about 12% of the market. That means that people do care about quality and that's starting to change a lot of things”.

To end the interview, a negotiation situation was simulated between a potential consumer and the interviewee, who promoted the strengths of his product, attempting to convey everything behind Colombian coffee:

"Because there are no intermediaries. Because it comes directly from small producers, who we take care of not paying them under costs. Because it is a coffee of the highest quality and it's fresh. Because we don't mix it with other coffees. Because we take care of the original humidity so that when you are there, the aroma is preserved.

4.1.3 Agronomic Engineer

In this last interview (see Annex 3), the interviewee is an Agronomic Engineer, who will explain in detail the **coffee production process** in Colombian crops. He will also describe certain innovative ideas implanted in the Colombian production systems that he has been able to witness during his work in the sector.

“Well, the bean practically starts with the coffee harvest, when it matures, but it is already in the plant. There come several types of coffee qualities depending on the climatic conditions, for instance, coffee could come 'balso', which is when the summer affects it a lot.

He has emphasized that the harvesting of the coffee bean is very important, as it will be crucial to obtain a coffee with a good quality afterwards, since if both, healthy and defective beans are harvested, in the following '**fermentation**' and '**washing**' processes, the mixture will lead to a terrible quality. In fact, he highlights that one of the reasons why Colombian coffee is good is because of its manual harvesting.

“That's why, coffee here in Colombia has good quality, because generally the cultivation is done bean by bean, manually, so the coffee is practically going as selected. Equally, I've been looking at harvesting systems in other countries like Brazil, which are huge producers of coffee as well. They do it with machinery”.

A generalized conclusion since this research began and expressed by the interviewee himself, is that the poorest quality coffee produced in Colombia is left for the consumption of Colombians themselves. This defective bean is called '**pasilla**' and is usually stirred with better quality coffee to increase the volume of the harvest, but even so, the flavour will be affected, as this will give the coffee a rancid taste.

A topic of interest has also been how the price of Colombian coffee depends a lot on the brand that markets it. The interviewee, who is a consumer in the Colombian market, comments that the three most consumed brands in Colombia are: 'Juan Valdez', 'Sello Rojo' and 'Águila Rojo'. But of these three, the first offers a very high price, because although it offers good quality, its consumers will also pay for the good reputation of the brand.

"For instance, in Juan Valdez, one 'tinto' will cost 8,000 COL\$. On the contrary, a 'tinto' in a regular cafe would cost not more than 2000 COL\$. So, the difference is incredible, it's four times more."

Finally, information of great relevance is explained by the author himself, since he was involved in said process:

"I was working on a program that the FNCC had here, which was the control of the borer based on parasitoids. Parasitoids are wasps, which are small animals that only feed with 'coffee borer'. So, the objective was to cultivate wasps in the laboratories, leave on the crops infected and lower the level of infestation".

This way of **pest control** is an ultra-powerful differentiator for coffee of Colombian origin among the rest. It is a very eco-responsible way of treating these pests, since the benefit is bidirectional: the pest is controlled without the need for chemicals and wildlife is encouraged. In fact, this pest control method is present in the production of 'organic coffee', which, as previously explained, is a **specialty coffee** that is in high demand in the market and with which Colombia is obtaining a competitive advantage.

4.2 Quantitative research

The purpose of this quantitative analysis is to obtain data on certain **habits of coffee consumers** to be able to understand the correlation between different factors that may be very relevant for the formation of attitudes and purchasing behavior of potential consumers of Colombian coffee. This is why, as this is a broad subject of study, it has been necessary to have a high number of respondents, as long as the limitations of the study have allowed it. In this case, the sample size has been of 277 respondents.

An **online questionnaire** (see Annex 4) has been carried out, as it is the most common method presently, and provides a series of benefits to the research: it has a very broad scope (a very necessary point in this study, since it is of great interest to know the opinion of populations from different cultures, avoiding a geographical limitation); zero field costs; there is no influencing effect on the part of the interviewer; and allows you to obtain a large number of responses easily.

The sample has been established through a **non-probabilistic method**, specifically "snowball" sampling, in such a way that it has allowed the researcher to select certain individuals to answer his survey, who in turn recommend others. That is why, for this research it is very useful to obtain diverse demographic variables that allow analyzing trends in coffee consumption according to: age, sex, profession and country of origin.

To carry out this quantitative analysis, the main criterion has been that the respondents were only **coffee consumers**, since the interest is in analysing the coffee consumption habits of the sample and therefore, being able to reinforce the hypotheses established at the beginning of the investigation, or, on the contrary, understand what is failing in the Colombian coffee strategy.

All participants in the survey were volunteers who agreed to answer the questions for the subsequent analysis of their results for use in this research, always preserving their right to privacy and anonymity. According to the statistical criteria imposed for populations, this survey pretends to extrapolate the numbers to an **infinite statistical society**, as it has a lot of aspects that are not possible to measure.

The survey is crafted to examine the assumptions generated in the theoretical framework, necessitating a thorough understanding of the topic. Without this, posing pertinent questions would be unfeasible. The structure of this questionnaire is clear and simple, ranging from the most general to the most particular. The survey is composed of 19 **closed questions**, but vary on: dichotomous, multiple choice and multiple answer and Likert scale. (from 1 to 5; 1 being not at all important; 5 being extremely important). The questions posed are intended to classify the respondent according to:

- Frequency of Consumption
- Purpose of Consumption
- Location of Consumption
- Preparation Methods
- Preferences of consumption
- Brand Loyalty
- Budget and Spending
- Health and Lifestyle Factors
- Environmental Considerations
- Demographic segmentation

4.2.1 Data sheet of the research

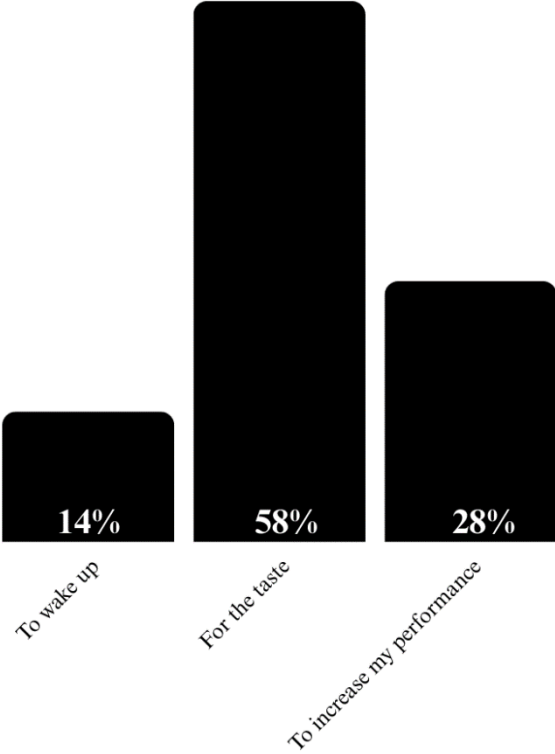
- Universe: people with access to internet
- Sample size: 277
- Sample selection: Non-probabilistic (Snowball sampling)
- Time period: 4th April- 22nd May, (2024)
- Questionnaire application: Self-administered questionnaire designed in Google Forms

4.2.2 Analysis and interpretation of the results

This questionnaire pretends to measure consumer attitudes towards the origin of the coffee to be consumed. More general questions are presented at the beginning so that the participant can feel oriented in the subject that is the objective of the analysis of this survey. In addition, the consumption habits will allow the researcher to draw conclusions in order to promote the different corporate strategies that the Colombian coffee brands use or have used

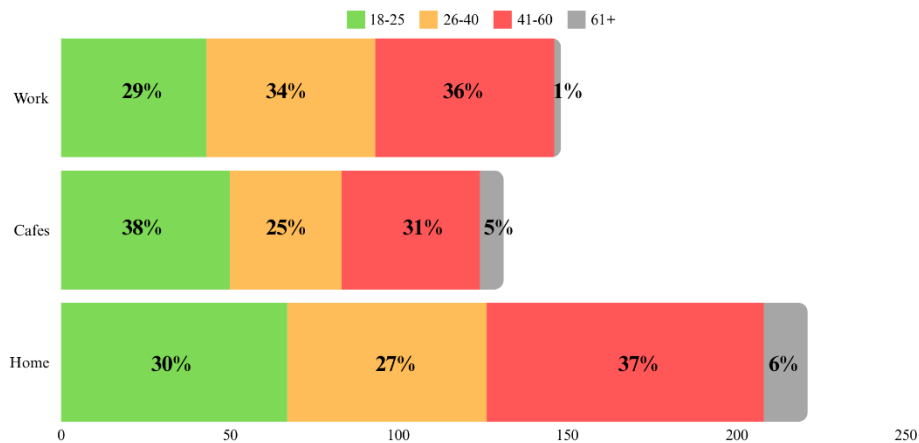
and also to be able to study the potential of these strategies or the need for their modification or creation.

Graph 1: Which is/are the reasons why you consume coffee?



This multiple-answer question is one of the first presented in the questionnaire. It is useful and necessary for the research to know how many people consume coffee only for its **stimulating properties** or if they really enjoy the taste of coffee. As the options “to wake up” and “to increase performance” could be perceived as very similar, if we join the percentage of their results (42%), the percentage of people that have affirmed that they usually drink coffee for its taste would still be higher, something that is a great support for the strengths that Colombian coffee has.

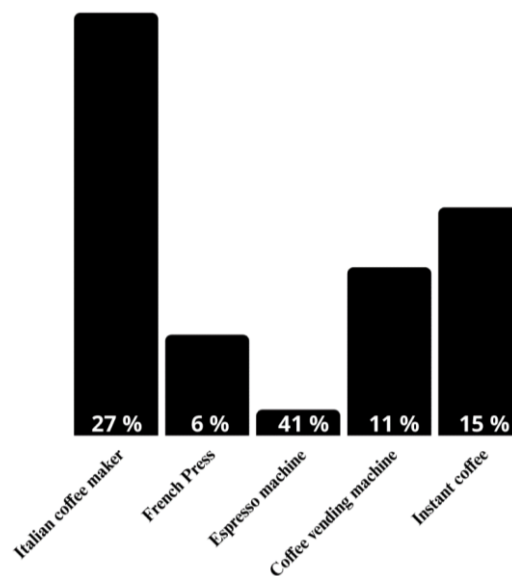
Graph 2: Where do you used to consume coffee? (according to your age range)



It is of great interest to understand the **correlation between the age of the respondent and the place where he/she usually drinks coffee**, to be able to analyze the purchase behaviour's trends of coffee consumers, according to the place where he/she is located. For this purpose, the responses were filtered according to age range in order to obtain the number of times that each option was chosen according to the age criterion. The three answers that are presented were elected because they are the three most common places where people consume coffee daily: at home, at work, and in coffee shops.

As can be seen, young people between 18-25 years of age consume more coffee in cafeterias, while those between 26-40 years of age consume it at work. On the contrary, those between 41-60 prefer to drink it at home, probably because their lifestyle at that age generally becomes more sedentary. Although those over 61 years of age have a very low percentage in all responses, it should be noted that of the 277 respondents, only 14 were classified in this range.

Graph 3: Which preparation method(s) you usually use to make your coffee?



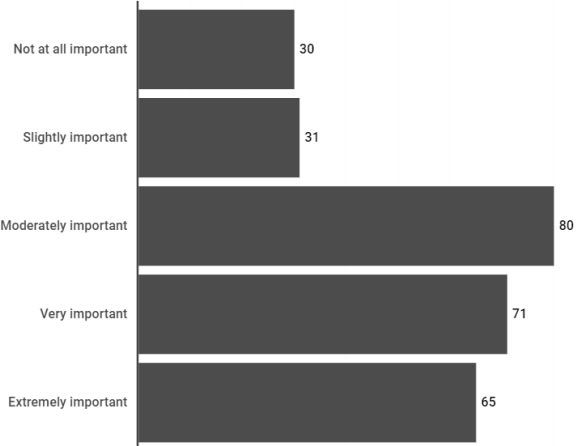
This is another of the multiple-response questions of the questionnaire, exactly to obtain data on the use of the **different coffee preparation machines** that are most common in the society of the 21st century and that have already been described in the theoretical framework. Among the 5 options presented, the protagonists were the “Espresso machine” and the “Italian coffee maker”. These results can be very relevant to understand the trendiest format and why it would be important for Colombian coffee’s brands to present their product in this way. In addition to the fact that if the users understand the correct function of this methods, they could get the best coffee as possible in their cups.

Graph 4: Do you used to add something to your coffee?



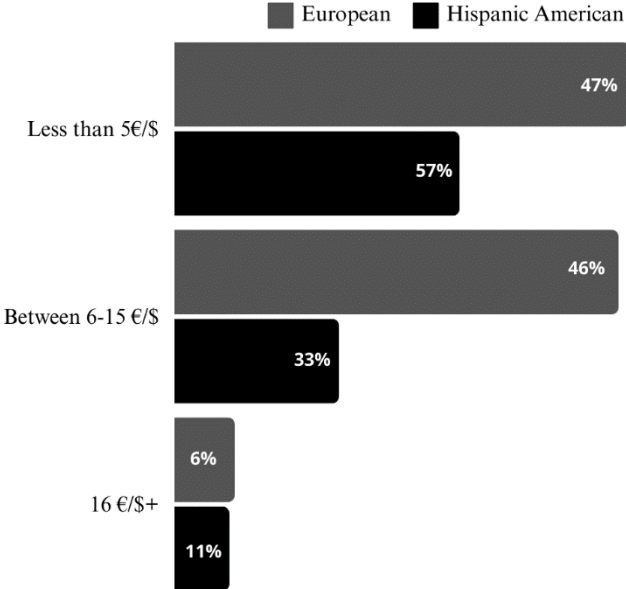
This multiple-choice question allows to continue analysing coffee consumption habits, as long as each person's palate demands it. Of the 277 responses, only a fifth drinks coffee only, while almost 40% add sugar and milk (the most everyday ingredients with which coffee is mixed). This allows us to go back to what was said in the interviews carried out, where it was established that a true coffee lover would drink it with no extras, which can be translated into the fact that the coffees most consumed by the population do not taste good on their own.

Graph 5: How important is for you the designation of origin/brand of your coffee?



With this question we begin to enter in more detail into the central topic of this project. Considering the number of responses, more than half of the respondents establish that it is important to them where their coffee comes from, which allows us to understand that it is a good aspect to start differentiating the product. In this case, using the Likert scale allows us to obtain more precise results, in order to understand exactly the opinions and feelings of the consumers towards the type of coffee they prefer to consume.

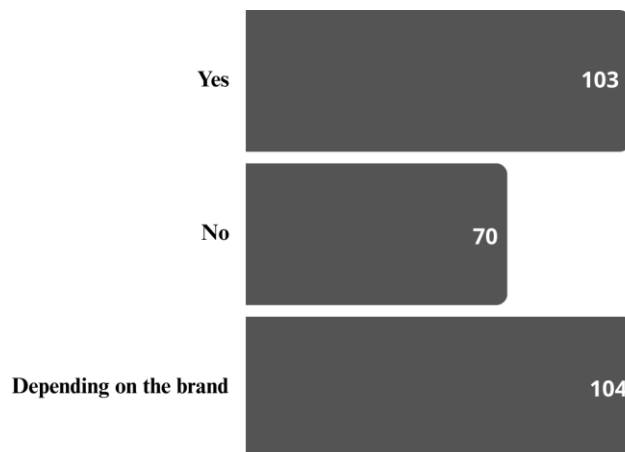
Graph 6: Which is your weekly expenditure on coffee?



With this question, data is provided to the **pricing section** described in the theoretical framework. Among the 5 nationalities provided in the demographic segmentation (African, European, Asian, North American and Hispanic American), the European and Hispanic American have accounted for 95% of the profile of the participants, which is why these two will be the only ones for which it is interesting to understand the **correlation between their coffee culture and weekly spending on it**.

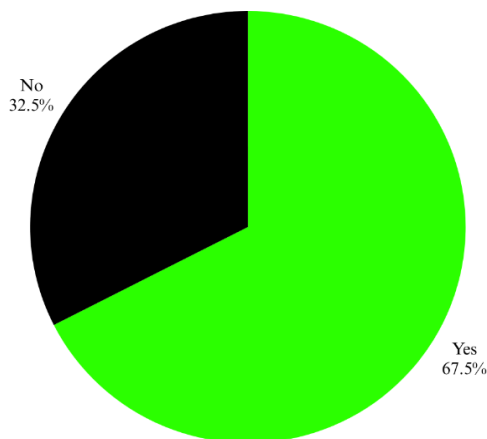
The answers allow us to deduce that Europeans spend more money on average weekly than Hispanic Americans (a point that takes us back to another moment in the interviews, in which it is confirmed that the poorest quality coffee is distributed among the Colombian population). But if you look at the option of spending more than 16 €/€, Hispanic Americans surpass Europeans in percentage of responses.

Graph 7: Are you willing to pay more for a premium/specialty coffee?



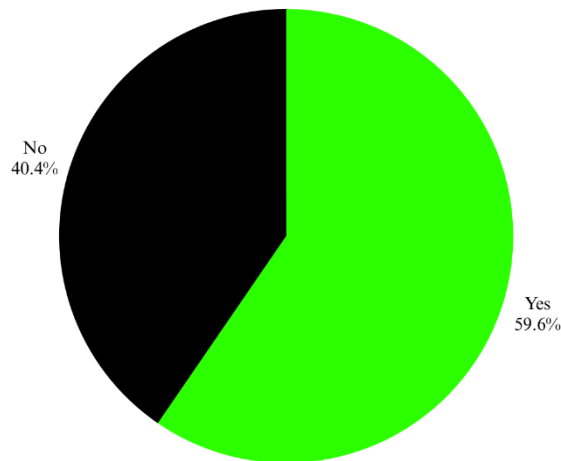
To continue providing information of the utmost interest to the price strategy already described, we go into even more detail on one of the star concepts of Colombian coffee, "**specialty coffee**". Based on the answers, it is proven that the market has a demanding and growing tendency for this type of coffee, but the brand image continues to be a very important factor for consumers, since in this question 40% of the answers say that they would pay more for a coffee depending on its brand.

Graph 8: Do you consider drinking coffee as a healthy habit?



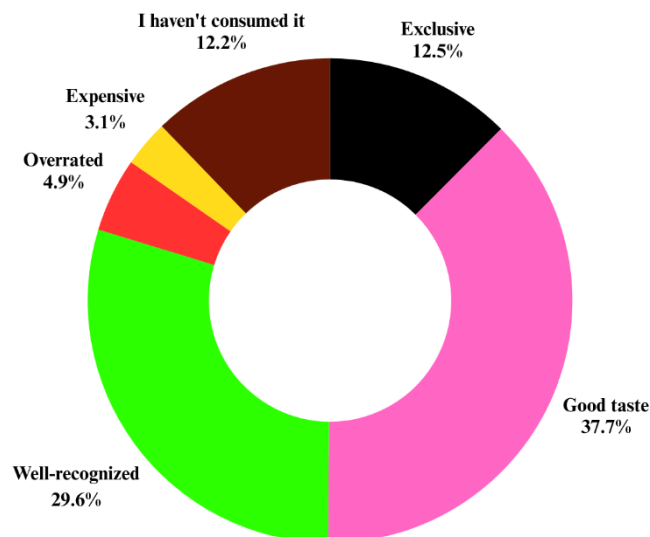
This question reinforces the bibliographic documentation about the **properties and benefits** that coffee provides to the organisms that consume it, since almost 70% of the answers are 'yes', regarding the perception of coffee as a healthy food. This question verifies that the characteristics that Colombian coffee has as a product pose an even more promising future for this coffee of origin, as long as the consumer is made aware of them.

Graph 9: Are you concerned about the socio-environmental impact that coffee production has on its countries of origin?



The results presented here are curious and interesting data beyond the habits of coffee consumers. The profile of many current coffee consumers can be classified as one of those interviewed (activists), since today **consciousness and respect for the environment and social equity** are increasingly common. As can be seen, 60% show concern for the socio-environmental impact of coffee-producing countries, what is very positive for the future of Colombian coffee growers, to raise awareness abroad about their current conditions and how everyone can improve them, contributing with its consumption.

Graph 10: How do you perceive Colombian coffee?



This is the last question of the survey and could be considered the most important and enriching of the quantitative analysis. It is presented at the end, since the participants have been able to orient themselves on the topic they were providing answers to and it is of great importance to go straight to the point about the problem that this project aims to understand and improve.

According to this doughnut chart, Colombian coffee has a **good reputation**, especially for its good flavour and aroma. Very few have negative perceptions about it, such as it being expensive or overrated, but even so, some do not consume it and **few consider it exclusive**. This means that the strategy around Colombian coffee is not quite right, since the characteristics of the product can be appreciated by those who consume it, but it is still not the preferred one.

5. FINAL CONCLUSIONS

Thanks to the numerous sources approached to develop the theoretical framework, it has been possible to trace Colombian coffee growing from its beginnings at the end of the 19th century. How the tradition of manual harvesting in the different coffee regions of Colombia makes it seem that no time had passed between Colombian crops and how the turnover of coffee production and exportation favoured the investment to create numerous projects in Colombian society.

The final product obtained from Colombian coffee is the result of intensive and arduous treatment of the different production phases. But even so, all the factors influence, since, for example, the geographical factors that give a coffee production full of nuances and above all, the features of “Arabica” varieties, which is the only one grown in the country, allows Colombian coffee to be high positioned among its main competitors, which just produce “Robusta” species, that does not provide the same sensory experience as a “specialty coffee” of these amazing characteristics.

With the data collected in the research process, it has been possible to establish how important is to take care of the preparing process of a cup of coffee. Indeed, if this were not the case, a figure that specializes in the final preparation of coffee, such as the “barista”, would not have been created for this sector. Many times, the fault of low-quality coffee is most likely, not the producer or the brand themselves, but rather the person who prepares the coffee drink in the coffee shops or even the household. Therefore, it is vitally important for a coffee lover to know their coffee machine and what type of coffee they are going to consume.

Despite a great production system, the turnover of coffee exports in Colombia is not distributed properly, and it has been proven that it is not only due to price fluctuations on the stock market, but also due to poor political management, full of irregularities and many risky actions that have not allowed the coffee industry in Colombia to give its maximum. To begin with, coffee of Colombian origin, in the form consumer demands it, is not made by the country itself, but by foreign companies that take all the credit.

It must also need to be taken into account that today, Colombia is not number 1 in world coffee production, because its main competitors are more extensive in land. Besides the fact that their production systems are more mechanized, so their production will be more efficient and faster. But most of the time quality is better than quantity, especially if the objective is to obtain **consumer advocacy**.

Regarding the promotional strategy that has marked “100% Colombian coffee” and that is the work of the ‘National Federation of Colombian Coffee Growers’, should be a reference for the rest of promotional strategies of any type of firms. “Juan Valdez and his mule Conchita”,

could not have been a better choice for coffee of Colombian origin, who has travelled the minds of coffee consumers from all over the world. It is amazing to see how a fictitious character represents a whole country, millions of inhabitants, and builds such a positive and original brand among consumers.

Whereas the new approach given to this strategy with the creation of a physical brand of Juan Valdez has been controversial, since the reputation of the name will allow easy recognition among the target audience, but it no longer represents the certification of every coffee produced in Colombia, because the logo is privatized and loses all its essence. Furthermore, the influence on prices means that the “buyer persona” of this brand is very select, but consequently, its scope would be limited.

The professionals in the sector who have participated in this research have all agreed on the same points: Colombian coffee is unique for its smooth flavour and aroma; It has an unmatched production system; It is much more than any brand of coffee. All the work that goes behind obtaining a simple cup of Colombian coffee is awesome, but the lack of communication of this type of content is a disadvantage, because the perspective on brand awareness would never be the same for a consumer who can know it.

Furthermore, the lack of social equity that characterizes third world countries, particularly Colombia, would never allow a healthy and progressive growth for the thousands of Colombian coffee growers. For this reason, the internal price policy cannot be controlled only by the public or private sector. As has been described in part of the history of the economic impact of coffee in Colombia, the golden years of the coffee sector in Colombia were when the coffee cooperatives had a voice and a vote before the government, the market was not so liberalized and did not depend just on exportations.

The results obtained with the questionnaire prove that Colombian coffee is perceived to provide a great added value. Users who have consumed it, agree that the benefits offered by this coffee are very positive: good flavour, well-recognition and is marketed by big brands, what transmits an influential power. But it is still not above other coffees, like for example, Brazilian one. The “brand equity” is highly dependent on prices.

To conclude, a very positive point that brands selling Colombian-origin coffee should leverage as a powerful competitive advantage is the great sustainability that Colombian coffee production is demonstrating. We are experiencing times of significant social activism and environmental concern, but greenwashing is dangerous. Therefore, to ensure that Colombian coffee does not fall into this trap, it is as simple as providing truthful and detailed information from those who are dedicated to this craft, without the need to invent or force meaningless promotions.

5.1 Implications

In the end, the information obtained from this research has allowed us to understand the global view on which the marketing strategy for Colombian coffee has been and is based and provides context for researchers who want to delve even deeper into this topic. For this reason, different **theoretical implications** will be presented to relate the current marketing world and the coffee sector in Colombia.

The root hypothesis to which this investigation was developed describes how an appropriate and well-defined marketing strategy can add so much additional value to a product that is becomes widely consumed. To begin with, the best way **to improve the brand equity** is to emphasize in the product strategies of coffee the following features: its quality, origin and sustainable production systems that will differentiate in front of the competitors.

Furthermore, innovation in the product offering, as is the case of **Colombian specialty coffees**, which introduce new flavours and more sustainable and healthier practices for the stakeholders, allows the product to be perceived as unique and of great value, thus differentiating itself in a crowded market. As a result, greater consumer loyalty and brand strength will lead to a **unique selling proposition**.

Regarding the influence that pricing strategies have on the way consumers perceive the quality of the product and how Colombian coffee is accepted in the market, the companies that decide to include it in their commercial activity have to consider that a higher price is associated with a better quality, so it is a good way to implement these strategies for ‘specialty coffees’, which should provide a certification of origin or organic production that will give it that veracity.

On the other hand, if the target market is price sensitive and the risk of substitution is high, competitive pricing strategies (**i.e. Value-based pricing**) will improve ‘**market penetration**’. As the costs logically must be lower than the turnover, in order to continue offering a good quality of Colombian coffee but with less investment, it would be good to make use of **private label brands**, which will not be so subject to the economic weight that a brand image will carry.

So as to distribution strategies being effective for Colombian coffee, and to get the product to the target audience, a wide offer must be ensured in the market, making the product much more accessible and allowing, so sales would increase, and greater **brand recognition** would be achieved in the mind of the consumer. To fill all the market gaps, both traditional and online retail channels will have to be mixed to address all consumer needs (e.g. applying “Search Engine Marketing” (SEM)).

To sum up, for the global positioning of Colombian coffee in the different market segments in which it already works or has potential, it is necessary to understand what needs they have to address. Positioning strategies must be both “**pull and push strategies**” to maintain a cohesive brand strategy that is customer oriented. In fact, Colombian coffee has demonstrated that it can satisfy different market segments, according to:

- Demographic segmentation (e.g. Budget)
- Psychographic segmentation (e.g. Lifestyle)
- Behavioral segmentation (e.g. Search of benefit)
- Occasion based segmentation (e.g. social meetings)

Beyond theory, there is a need to give way to practice, so these marketing concepts are the basis for any corporate strategy. As a result, the following implications are practical as a series of recommendations for companies that decide to integrate into their portfolio the coffee varieties produced in Colombia and that carry their certificate of origin from this country. Indeed, primary research is the one that has allowed the most **practical implications** for this project.

Coffee in Colombia, as described before, is mostly exported green, so it is common that foreign firms are the ones that roast it and provide the final product to the end consumer under their brand name. To prevent that the positioning of coffee of Colombian origin does not only depend on brand association and the benefit is not well distributed between the small producers, but Colombia also has to start taking care of the roasting process. In fact, Colombian coffee's brands must be able to demonstrate that they have a presence in all processes and are responsible for the quality of the coffee they sell, in order to truly benefit from the Juan Valdez logo.

The **supply chain needs to be optimized** as much as possible to be able to reduce costs, but making it more efficient, so Colombian coffee can be more competitive. To do this, it will be essential to partner with distributors with a wide range of scope and a large career path in the sector, ensuring the transportation and delivery of the products on time, without affecting the state of conservation of the coffee and avoiding excessive stock that produces unnecessary warehouse expenses, that would not provide the same coffee quality to the consumer that was intended since the beginning of the production process.

Brands can adopt an **integrated marketing strategy** when carrying out their communication and promotion plans. Storytelling is very beneficial to convey to the potential consumer everything that is carried out before a cup of Colombian coffee reaches their hands. Social networks are a good immediate communication channel, which with the help of influencers, who are powerful brand ambassadors, can **enhance consumer engagement by improving brand awareness**.

The social networks that brands can take most advantage of right now are Tik Tok and Instagram, because of their format and the way their algorithm works, they have managed to reach the homes of millions of people on a daily basis. So, it is an easy method of **organic positioning** on the internet and a much cheaper option than a public advertisement on television, for example. It is also a space where consumers can create very visual content and give their opinion on products as reviews, which is currently the most used form of reliability reviews on the net.

Most Colombian coffee brands only use traditional marketing, which is beneficial because personalized service is highly appreciated in this market, but today's customers are true researchers: they research online and buy offline (**ROPO**). Therefore, the creation of a website in which the values of the brand, its mission and vision are described in detail, in addition to an eye-catching product catalogue, will increase the consumer's attraction and they will be the ones who seek to satisfy their needs with the brand.

To conclude, Colombian coffee has demonstrated almost perfect qualities to satisfy large market segments, and even many niches as well. But they have a problem between their customer relationship management (**CRM**) and how they promote the producing country. Systems of sustainable production, like the fight against the pests that threaten coffee crops using parasitoids, is a very favourable point for a market that increasingly bases its demand on brands with great corporate social responsibility, but if you do not spread the information to the consumer you will never be able to exploit their maximum potential.

5.2 Limitations of the study

Despite the efforts made to provide a comprehensive view of the marketing mix of Colombian coffee, this study presents several limitations that must be considered when interpreting the results and conclusions. Due to the lack of resources and budget on the primary research, certain factors could not be measured.

Although 277 people were interviewed, the sample size may not be sufficiently representative for the entire population of coffee consumers. The geographic, cultural, and socioeconomic diversity of coffee consumers may not be fully reflected in this sample. This may limit the generalizability of the findings to a broader population. Furthermore, the methodology used to select participants for the questionnaire and interviews could have introduced bias.

The study was carried out in a specific period, which may influence the results obtained. Coffee drinking habits and marketing trends may vary over time due to seasonal changes, economic events, or fads. Therefore, the results may not be applicable at other times of the year or under different economic conditions. Moreover, data collected through surveys depends on the accuracy and honesty of participants' responses, so some factors, like, 'lack of memory' or understanding of the questions could affect.

Although interviews were conducted with industry professionals, the depth and breadth of information obtained may have been limited by the time available and the interviewees' willingness to share detailed information. Additionally, responses may be influenced by the subjectivity and personal bias of the interviewees. And if the number of interviewers were greater, it would be possible to delve into other areas of the sector.

With respect to the limitations of the methodology and tools used, the questionnaire has been analysed using Excel and creating visual graphics in Canva from the results obtained. Similarly, the interviews were transcribed and translated manually. Being a one-person job, makes efficiency to decrease and human error to increase. In addition, translations from English to Spanish can also cause a dissonance between what the speaker or respondent wants to say and the conversion of those words into another language.

Finally, the study focused specifically on the components of the marketing mix (product, price, place, and promotion). However, other external factors, such as the economic environment, government policies, and global coffee market trends, may also have a significant impact on the consumption and marketing of Colombian coffee, but were not addressed in depth, because some governmental policies imposed throughout history were analysed in general terms, but what is happening today was not detailed.

5.3 Future lines of the research

Derived from this paper, future lines of research have emerged for the marketing strategy of Colombian coffee. Firstly, it is of great interest, due to the trends demanded by the market, how promotional and communication actions regarding sustainability influence consumers' purchasing decisions and their loyalty to coffee brands. To do this, it will be necessary to study the evolution of consumer preferences regarding sustainability in recent years and forecast future trends.

It has been proven that the Colombian coffee industry is very traditional. Although some brands, like Juan Valdez, are adapting to the new digital marketing techniques of the 21st century, this is not enough for the industry to completely modernize. Therefore, it is necessary to compare the effectiveness of digital marketing strategies versus traditional ones in the promotional strategy of Colombian coffee, and how each approach influences different market segments.

Regarding the role of the certificates that a coffee can have depending on what characteristics and benefits it provides to the consumer, it is relevant to investigate how this can make the consumer perceive Colombian coffee with greater positivity and confidence so as a result, it generates greater attraction to the product. Even sustainability certificates associate it with great quality and corporate social responsibility.

Innovations in Colombian coffee production systems can be applied in marketing strategies. They can become references and patented in the market as a '100% Colombian creation' and give that merit to the long tradition and R&D of all Colombian coffee growers. In fact, it can serve as an "**inbound marketing**" strategy, since communicating this type of informative content to the audience can make it more interesting, especially since these techniques contribute to a better quality of the final result.

A very useful tool for survey's analysis is SPSS. It provides much more advanced statistical analysis tools (than e.g. Excel): multiple regression, ANOVA, factor analysis. In addition, human error is minimized in SPSS, while in Excel the formulas are manual. Finally, the creation of graphs in design tools such as Canva is more laborious and does not offer the same accuracy and professionalism as SPSS. In summary, SPSS would be a better choice when analysing data of this type, because it saves time, improves accuracy and data veracity.

Besides, the mixture of methodology, as has been done in this research, between quantitative and qualitative analysis, gives much more variety of information to analyse and from which to be able to deduce trends, needs and details between the supply and demand on this industry. Also, giving voice to both consumers and professionals of the sector allows to understand the different points of view of the agents in the value chain and customer demands, so sufficient feedback could be obtained on what to improve and how to outline marketing strategies within the Colombian coffee sector.

Finally, Colombian coffee has many opportunities to continue growing. Consequently, it is very feasible that it can enter new emerging markets and fill gaps of the market. To do this, it will be necessary to consider how to address cultural differences that may represent a barrier to the commercialization and acceptance of Colombian coffee in these new sectors, but which would be a great business opportunity to reinvent the industry and expand its scope, including improvements and modifications of their products to satisfy consumer's needs.

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7. ANNEXES

Annex 1: Transcription of Interview with A professional Coffee Taster

Giancarlo Parolisi

“The interview we are going to conduct will be part of a research on the marketing strategy of Colombian coffee since the beginning of its history. I am interested in your point of view on the product differentiation of coffee produced in Colombia”.

Coffee Taster

"I've been working in the coffee sector for about 40 years,for the Federation of Coffee Growers of Colombia, which is an entity that brings together coffee farmers, looking after, let's say the well-being of the coffee growers, selling the coffee in the market and trying to get the possible highest price" .

"The farmers can decide to sell the coffee to the federation or sell it to private exporters, there is a free market. And basically what I do is quality control, that is, the issue of knowing what quality is suitable for export, the conditions that coffee must have for export. Obviously, the 'tasting' is one of the most essential tests that have to be done to define if the coffee is suitable for the foreign market and the domestic market, to establish the defects that the coffee cup may have, because a coffee that does not meet the quality standards, cannot be exported".

"So those controls are very strict because the quality of Colombian coffee has a good reputation, due to its smoothness and delicacy. So, if a coffee with different characteristics is sold in the market, that would be detrimental to the entire image of Colombian coffee".

"My work here in Europe, is basically to test many samples as possible, that have or not the logo of 'Café de Colombia' and then define if the coffee is processed by the roasters that import the coffee from Colombia and if it corresponds to Colombian coffee or not. So the test, as I was saying, the most important part is done by the cup test and that's what I'm dedicated to".

"I have to travel very often to Amsterdam, where the European office of the federation is located and there I do some quality controls, but I also receive samples sometimes here in Spain, because as a result of the pandemic they enabled a space here in my house, so I can work independently on some samples".

Giancarlo Parolisi

"Clear. And how would you define Colombian coffee, what makes it different?"

Coffee Taster

"The cleanness of the cup, the acidity also and the absence of effects or flavors let's say as ordinary. For example, woody flavors, phenolic flavors, or ferments. Well, the process that they do for Colombian coffee is so demanding, at each stage of the process there are controls and there are samples that are sent to the central laboratories of the federation to make sure that coffee is complying with the requirements at each stage of the process. So at the end of the

process, normally the coffee for export, after the controls they do at the port and before the coffee is shipped, it comes out very well tasted, let's say".

"In despite, there are times when you have to double check because they may have missed some defect or that they are simply mixing it here with coffees of inferior quality. So in the 'cup test', although it is not 100% objective test, is always subject to the taster's opinion, but is still the test more revealing about the quality of the coffee. In conclusion, if you find a coffee with those defects that I was telling you about, a phenol, a ferment, a chemical, a rust, etc, you already know that this coffee is not Colombian or cannot be sold as it.

Giancarlo Parolisi

"So these tests that you make, are basically serving a cup of coffee and taste it while you drink it, or what does it really consist on?"

Coffee Taster

"Exactly! There are some auxiliary controls, like measuring the coffee's humidity. For instance, if I receive green coffee's samples, which is normally how is exported from Colombia, it has to be roasted, ground and tasted to know if the coffee is valid. Other times I receive samples that have been collected by independent buyers in the market, let's say here in my case, in Europe, in different countries and they send them with their different brands, it can be beans roasted and ground, it can be in capsules or even soluble coffee. In that case, what is done is simply the cup test, followed by specific 'ISO' standards".

"If it fulfils the requirements, a report is sent to the federation. I work with 'intellectual property', as the FNCC is in charge of watching over the image of Colombian coffee in the world. So you can't put the Juan Valdez' logo without the permission of the federation. An agreement is signed and they have to send samples every three months to where I told you before, to Amsterdam, and that is my job, make the controls of those samples that they send and also of the samples that a company that is hired independently so that they can buy in the markets in different places of interest, like supermarkets, coffee shops, etc".

"There are already some specific cases that have had the logo removed and sometimes they have had to do legal procedures, but normally what is done is to send them a letter noticing them. That's also part of my job, as an analyst is not at all to interact with the roaster, but it is the federation that in a case of doubt or that it is proven that it is not Colombian coffee, they already contact the roasters and talk about what is going wrong with the coffee and the corrective measures to be taken".

Giancarlo Parolisi

"So to make sure if I have understood it correctly, when we see here in Europe that a coffee is Colombian, with Juan Valdez' logo on its package, it is not for the mere fact that the cultivation has been in Colombia, but for the standard of quality coffee, right?"

Coffee Taster

"Of course! It has to meet the Colombian cup profile and as they do within their reports, it can't be that a small roaster is going to go out and export 10 tons of coffee, so they also look at that corresponds, more or less, with the quantities that are going to be passed on to the consumer. Let's say if you are a roaster and you say that you're going to sell in Spain 10 tons of roasted and ground coffee, then It's not going to be very credible".

"My part it's more about sensory control, sensoral analysis, to analyze if the coffee meets those characteristics. Is difficult to be right 100% because now in Colombia coffees are arriving from other origins, the vast majority are used for the domestic market because the internal market used to be supplied with Colombian coffee itself, but now I understand that few years ago they had to buy coffees from other origins because are cheaper".

Giancarlo Parolisi

"As you've been working with FNCC for such a long time,how well positioned do you think Colombian coffee is?"

Coffee Taster

"I think it is very well positioned. Firstly, in the special coffee fairs that are held every year where the Federation assists, there are some 'baristas', who are people that already manage coffee at the level of their own establishments, they usually sell Colombian coffee from different and also the presence of coffee on the shelves of supermarkets".

"There is still a lot of interest from roasters to buy Colombian coffees for specific brands of 100% Colombian coffee because Colombian coffee is also used a lot with blends, because it gives the drink a certain smoothness. So if I'm selling a coffee in a supermarket, not already 100% Colombian, it's normal to find blended coffee blends that put it in Brazil, they put coffees from other origins and they put it in Colombia to give more smoothness to the cup. If you go to a supermarket, I'm sure you're going to find not only the brands of, but the private labels of the supermarket, 100% Colombia".

"Is not only because of the product itself, but because of the seriousness that has distinguished the manufacturing process of Colombian coffee, the federation has been working for many years, almost 100, they're reliable exporters, that if they tell you that the quality is going to be such, then it is fulfilled, that they comply with the shipments. Behind all the product there is a very logistical management, the brand image management is very good too. Is a 'know-how' acquired from a long time ago".

Giancarlo Parolisi

"To conclude, I would like to ask you two questions: the first one, what brands of coffee do you think in the market, especially because of their price, like Juan Valdez for example?"

Coffee Taster

"Yes, Juan Valdez is now in supermarkets, even in European ones, and also have their own establishments, which are managed directly from Colombia or as franchises. It is known that

are coffees from colombian farmers and that it is a very good one, but is very difficult to say which one is better, because there are multiple brands in Europe, but as soon as they comply with the Coffee Profile, they would all be good".

"It is also important to say that there are some roasters who handle coffee better in the factory than others, so they buy Colombian coffee, but that does not ensure that the final product is always excellent. Why? Because it's not just enough with the origin, but how the coffee is handled in the factory".

"For example, if you roast it, but you pack it 20 days after roasting it in a beautiful package, with a great design and all that, coffee is already going to be with a certain rancidity, with oxidation, so it's not going to have the same profile as if you're a roaster and you handle the product with a good technique in all processes, both in the reception of the raw material, in the roasting process, grinding, packaging, degassing, etc. If you do it very well, then the coffee will preserve in the end. When you drink the coffee in a month it is excellent, but if the coffee has been bad for a long time, being badly treated in the factory. If they leave the green coffee for a long period before roasting, the coffee acquires a defective flavor that is called 'reposito' and that makes the coffee not to have the same flavours and quality characteristics of a fresh coffee".

Giancarlo Parolisi

"To what extent does the fact that I have very good coffee, but I use a certain method of preparation, can determine whether the consumer tastes that coffee better or worse?"

Coffee Taster

"It's a good thing you touched on that point. I can have the best product in the world and I can roast it perfectly, I buy it fresh, I take care of it and if at the end I has not washed the machine, for example at night it leaves it dirty, as happened to me on one occasion when a president of Colombia came. I had to go to the hotel to see how the machine was it and it was one of those luxurious hotels. Water is 98% of coffee and if I mishandle the water-to-coffee ratio or I don't filter the water, like could be the case of certain cities of Spain, that water will give an unpleasant taste to the coffee because it is not suitable. Therefore, the final preparation is also key to determining the quality. As a consequence, you can lose the image and all the effort that all the farmers have made during the whole process".

Giancarlo Parolisi

"Super interesting! I had this, because you know the fame of a Spanish bar that they serve a very bad coffee".

Coffee Taster

"Spain is realizing to work with good quality coffees, because coffee gives a lot of margin in coffee shops, but it's unbelievable how those coffee shops bet on very bad coffees having the opportunity to choose better quality, because that coffee is going to give them a greater margin and will improve their customer. But usually, if you go to a bar, it is normal that the coffee they put inside is an Arabica like the one from Colombia, but already inferior because

they mix it with robusta coffee, which is the second largest species. This type of coffee is used for processed coffee or for soluble coffees. It is a much rougher coffee, less delicate, less acidic and therefore a much inferior coffee. So many continue to buy very cheap coffees, but they. Don't invest in quality.

Annex 2: Transcription of Interview with an entrepreneur

Giancarlo Parolisi

“The interview we are going to conduct will be part of a research on the marketing strategy of Colombian coffee since the beginning of its history. I would like to know your opinion about the positioning of Colombian coffee in Spain”.

Coffee “Las Margaritas” Owner

"My dad owns a farm that produces around 45000 arabica trees, it is in the Central Mountain range, in 'Buenavista', in 'Quindío' department. It has four mountain range municipalities. So, I've been in Spain for 17 years and in 2018 I went to the farm and I realized that the overseer of the farm was going to leave it because he said it wasn't profitable. So I surprised how so it could not be profitable if the coffee pound is sold for €1.50- 2€. That's why, the thing is that I started to do the math and I was freaking out. So I decided to dedicate my life to coffee. In order not to lose money was first to know how coffee is regulated on the stock exchange.

Giancarlo Parolisi

"Oh! I didn't know that coffee is regulated on the stock exchange".

Coffee “Las Margaritas” Owner

"Is a commodity, so the price does not depend on the federation, nor on the producer, nor on the cooperatives, it depends on the stock market. So if something happens, prices fall. Consequently, that makes big companies speculate downwards and buy when it suits, so the only one who loses is the peasant."

"So when I investigated all that and the power that coffee had, I realized that coffee is the second most consumed product in the world”.

Giancarlo Parolisi

"Yes, this is the main reason why it caught my attention, because I saw a statistic that says that ‘water, coke and coffee’ were the most consumed beverages in the world."

Coffee “Las Margaritas” Owner

"When I noticed that William (overseer) wanted to leave the farm, I realized that selling green is not profitable. By the way, do you know who gets the most profitability in the coffee

business? The roasters, the one who roasts it is the one who has a brand, is the one who makes the most money".

Giancarlo Parolisi

"Of course, in the end it is the one who is directly related to the consumer, the one who roasts it is the one who has his own brand, right?"

Coffee "Las Margaritas" Owner

"Yeah! is the one who possess sales channels, regardless of whether he is a consumer, distributor or whatever. So I said, well then you can't sell green, so it's time to create a brand, you know? Because no one is going to buy my coffee without a brand association".

"My idea was to start just importing the coffee from the farm to Spain, but then I realized that Colombians don't drink good coffee, so I also decided to start selling it in Colombia too".

Giancarlo Parolisi

"And why do you think Colombians don't drink good coffee?"

Coffee "Las Margaritas" Owner

"As it is its country of origin, in Colombia all the residue remains, thankfully it's no longer like that, it's changing. But in 2018, 'Sello Rojo' and 'Águila Roja' and the rest of own labels sell in Colombia the surplus from the exportations (i.e. coffee of poor quality)".

"Do you understand what specialty coffee is?"

Giancarlo Parolisi

"I've heard the concept, but I could not explain it".

Coffee "Las Margaritas" Owner

"Specialty coffee is consequence of how the coffee business has regenerated, because usually you don't get good coffee in coffee shop. I think you've already figured it. For example, in Spain coffee was so mistreated and there was no traceability, I mean, you didn't know where that coffee came from, so what did the people who had a demanding palate and who liked coffee a lot, was to create the 'Specialty Coffee Association' (SCA), which is an organization that governs the grain physically, but also the sensory part. They analyze 10 aspects in a cup of coffee, like: the acidity, the smoothness, the sweetness, the intensity and the body. And if the coffee scores more than 80 points, it's considered specialty coffee. If it doesn't reach 80 points, it's regular coffee."

"That's how it was created the concept of 'specialty coffee shops'. What started to happen? Well, in order to get specialty coffee shops had to go to the origin, because it can't be, I mean, you can't take coffee from many farms, it has to be coffee from one place to be able to make those

notes really special. So that concept is supposed to take care of the coffee grower, that it takes care of the environment, the quality of the coffee and that it also takes care of the consumer".

"Today it occupies about 12% of the market. That means that people do care about quality and that's starting to change a lot of things. So, I had the coffee from my father's farm analyzed and it gave 86 points. Well, my father's farm is in a microclimate, blah, blah, blah, blah, blah, blah, Then it makes that coffee have unique notes. But it's the same with wine, with apples, with everything."

" So that is why I analyzed how to help William so that he didn't leave the farm and leave the farm lying around, because the only option was to create a brand. That's when the 'Margaritas' came out. We quickly climbed up and well, the coffee 'Las Margaritas' in Quindío is a leader now".

"I started to understand that people who buy it, (the government, the cooperatives, the federation) take all the coffee out of the country in green, which is very harmful for the Colombian economy. Did you know what means to take green coffee out of Colombia? 99% of the exportations are green".

Giancarlo Parolisi

"I didn't know that Colombia sell to foreign markets 'green coffee', but I thought that the bags of ground coffee you can find in supermarkets here in Spain were directly sent from Colombia in that format".

Coffee “Las Margaritas” Owner

"If you look the statistics made by the 'National Administrative Department of Statistics (DANE), you're going to realize that 99% of the coffee that leaves Colombia is green and most of the coffee goes to the U.S. Even so, I've asked 'Procolombia' to give me the statistics because I want to review them after COVID. What is the trend that is supposed to be with the free trade agreement with Europe, that trend has to change. Do you know where the 22 most coffee-consuming countries are? They're all in Europe. 23 is Spain and 24 is the USA. So you wonder if Colombia is the best coffee in the world why everything goes to the United States, if the best consumers are in Europe. Isn't it crazy?"

"The industry threshes it and sorts it by size and quality and removes defects and prepares it for export in green. The one who buys it and sells it is the one who roasts it. And those are foreign companies and depending on whether they have a toaster, they will have some costs. For example, in this case, I don't have a toaster, so I outsource the roasting process. It costs me about €3 to roast 1 kg of coffee. There are people who buy coffee and store it and then when the price goes up, they sell it. Those are the 'brokers' ".

"Switzerland is the country that exports the most coffee in the world.it keeps the richness of coffee, the added value is. You must understand that coffee leaves Colombia as a raw material. Every raw material that is transformed and at that moment ceases to be Colombian and becomes the country that transforms it".

Giancarlo Parolisi

"That's a reason in which my interest of this research is based, you know what I mean? Why Colombia is the one who bears the brunt, specially small producers".

Coffee "Las Margaritas" Owner

"So, the first aspect that has to change is that Colombia stops exporting just green coffee. But since the industry is like this, it's very difficult to change that. That's why, I decided to delegate all the steps in the value chain to eliminate all the intermediaries. When I started to look at all the logistics I realized that there were more than 12 intermediaries from William, who is the one who grows, to the fact that it is sold in the cup in Spain".

"That made me reinforce the topic, the concept of brand, project and things in life because the coffee on the farm is already short and well, we have to start changing. So that's the story of coffee "Las Margaritas", because the industry does it really bad".

Giancarlo Parolisi

"Super interesting! And since you're so interested in the fact that you're so involved in the Corporate Social Responsibility of your business, that it's not just money, I'd like to know, which is the portion of the turnover that the peasant receives".

Coffee "Las Margaritas" Owner

"The coffee-growers sell it in 'parchment' to the cooperatives, because that's the way the government in Colombia establish this sector, through a cooperative system".

Giancarlo Parolisi

"Although you told me is regulated on the stock exchange, how do you see the price increase from the time it leaves Colombia until it arrives here in Spain, for example, apart from well, the currency exchange and all that".

Coffee "Las Margaritas" Owner

"That question is answered when the farmer harvests the coffee, he has two possibilities: to sell it to the cooperative at a stock market price, which is usually a million and a half per load, or to look for customers abroad, like me. But this customer like me knows that coffee is regulated on the stock exchange, so he's not going to pay him more than what's on the exchange, you know? For example, I usually pay 30% more than I do in the bag, but when the stock market shoots up, I can't, so I have to compete with the rest of buyers".

"For me to make that calculation I would have to know the average kilo, according to the quality of coffee in Spain, that is, If you go to 'Makro', you will find that 1kg. of coffee costs around €8. I sell it at 14, 50, but there are coffees from 30-40€. When I started the project I sold it at €35, what happens is that if I continued to sell at that price I was never going to grow, you know?"

Giancarlo Parolisi

"Under your experience, how have you seen the Spanish market?"

Coffee "Las Margaritas" Owner

"They have a very low coffee culture. As a matter of fact, the Spanish consumer does not even know that the coffee bean is red. Good coffee growers buy coffee, buy coffee beans and grind it at home before brewing it and drink it without milk and sugar. And most Spaniards buy it ground.

Giancarlo Parolisi

"So you think that the fact of directly buying bags of ground coffee, will influence the flavour and quality of it".

Coffee "Las Margaritas" Owner

"Exactly! And when the capsules arrived the quality was even lower. But people who really like coffee and could identify its good quality abandons the capsules. The thing is, you have to educate".

"High quality coffees have to be prepared well, so it is not worth buying it ground. And if you're going to buy it ground, you have to make sure that grind is according to the method of how you prepare it at home. A grind is not the same for an Italian as for a French coffee maker, or for a paper filter, or for an espresso machine. It has to be a thinner grind".

"That is is what the specialty in coffees does, explain all those things".

Giancarlo Parolisi

"And how did you prepare yourself?"

Coffee "Las Margaritas" Owner

"I studied a master's degree in international trade. And when I got into coffee, I specialized in coffee, but I trained on my own, plus I have a farm and all that history, you know? Then it's easier. So I know the process from the moment it is planted until it is served in a cup in Colombia and Spain".

"There were sacks that cost me €5 in green to put it in Spain, but when COVID arrived, inflation, etc, it was almost at €8 per kilo, plus what the toaster charges you, plus what it costs you for the bag to pack it, with all the history of marketing, and the price you want to put, the image you want to win".

Giancarlo Parolisi

"So, of course, you would tell me, within the competition that you have and that you have seen within the world of coffee, in this case, especially the Colombian one, when there is a big price

difference between one brand and another, you think that is because of the quality is excessively different or because of the marketing strategy".

Coffee “Las Margaritas” Owner

"Investing great capital in marketing helps a lot, but when the customer is very demanding, knows how to distinguish a good coffee from a bad one, then he will not pay more than €8 for a poor quality coffee".

Giancarlo Parolisi

"So, without evaluating if it is better or worse, 'Juan Valdez', which is a brand that anyone who drinks coffee knows and associate with Colombia, would you say that it is the most expensive brand of coffee currently on the market?"

Coffee “Las Margaritas” Owner

"No, there is much more expensive coffee. In other words, the specialty is much more expensive than Juan Valdez. But Juan Valdez is still expensive. Let's see, you have to go through it, you have to think that just the fact that it is Colombian coffee already on the stock market is more expensive. Colombia as a designation of origin has a plus of quality because it is Arabic variety, so it is €0.50 more expensive. As a consequence, the industry prefers to go and buy coffee from Taiwan or Brazil".

Giancarlo Parolisi

"That's one thing that draw my attention, although coffee of Colombian origin has a great recognition, I observed that many European countries bet for coffees from other designations of origin".

"Finally, not to take up your time anymore, if I'm a coffee consumer and I find you one day in a coffee shop, can you to tell me why should I try your coffee instead of your competitors?"

Coffee “Las Margaritas” Owner

"Because there are no intermediaries. Because it comes directly from small producers, who we take care of not paying under costs. Because it is a coffee of the highest quality and it's fresh. Because we don't mix it with other coffees. Because we take care of the original humidity so that when you are there, the aroma is preserved. Indeed, in the brand's website you'll find 17 differentiating factors".

Annex 3: Transcription of Interview with an Agronomic Engineer

Giancarlo Parolisi

"The interview we are going to conduct will be part of a research on the marketing strategy of Colombian coffee since the beginning of its history. "I would like us to talk about the coffee

process from the moment the bean comes out until it becomes the bag that any consumer buys to be able to consume it at home, in other words, who intervenes and what steps have to be taken. I understand that the coffee production has to go through different stages before it reaches the consumer, so if can you let me know a little bit about that, how it works”.

Agronomic Engineer

“Well, the bean practically starts with the coffee harvest, when it matures, but it is already in the plant. There come several types of coffee qualities depending on the climatic conditions, for instance, coffee could come 'balso', which is when the summer affects it a lot. The moment of **classification of the coffee beans** is during 'washing process' of coffee, but many people don't do it because ,well, to earn more money, then they leave what is commonly called the '**pasilla**', that is a coffee that comes without the seed or it comes in bad condition, that coffee can be taken out easily, because it rises on top of the 'good coffee', but there are people who do not remove so that the coffee weighs more heavily and of course, that affects the quality of the grain. So that would be like a type of poor-quality coffee, that little 'pasilla' that many people leave mixed with good coffee and when the coffee is going to be roasted and all that, that is all scrambled without sense, consequently, the quality is damaged. Another issue that can affect the quality are **pests**, for example, the coffee 'borer', which is a pest that has been established here in Colombia for more than 20 years and there are many regions where it affects more than in others, specially in the hot areas the 'borer' reproduces a lot and it also affects the bean directly because part of the seed is consumed ,so the 'weevil' is going to come out. “

“If that coffee is not selected at the time of 'threshing', therefore, it's going to come out coffee of different calibers (i.e. of different qualities). I think that in order to obtain a coffee with a very good quality, it is completely necessary to select all the healthy beans.”

“Another factor that can intervene in the quality of the coffee is the 'roasting'. This process is very important, I think it is one of the most important factors for a brand to be accredited, because they have very high roasting standards, because if the coffee passes the roasting point, the quality will change completely, also the flavour. That process is known '**beneficio del café**'.

“In addition, something that can affect as well, here I'm going back more or less to the beginning, is the '**fermentation**' of the grain. At the time of pulping, that is, the husk is removed, the coffee is left to ferment to do the washing, to remove the mucilage that it has, then it is left for a certain time, to say something at least, a day, but there are many people who do not do the washing on time, so coffee ferments too much, like they leave it for two or three days and that makes the coffee to burn, because the fermentation is tremendous. So as a consequence, the coffee come out with a different flavour, because that is directly affecting the almond (seed) of the coffee, so it comes out overripe”.

“Those are all the factors that influence the quality of the coffee. That is why, I think that the people who are dedicated to extracting excellent coffee, dedicate to exportation and all that, have to consider all these factors that are very important to produce a good coffee, right?”

Giancarlo Parolisi

“In Europe when you hear that a coffee is of Colombian origin, for example, people think that coffee is produced in every corner of the country, but I don't know if that's true, if in every city of Colombia, coffee is produced, I understand that the region that produces the most is the 'Eje Cafetero'.”

Agronomic Engineer

“That's it! The areas in Colombia where more coffee is produced, as its name indicates, is the 'Eje cafetero': Risaralda, Caldas and Quindío. Another area where coffee is grown a lot, is 'Huila', which is now among the first to produce a lot of coffee in the southern part of Colombia, Huila. It's generally the basis of the economy there. As well as Antioquia.

“On the 'Cundinamarca' side, there are also areas where coffee is produced. It's the fact that coffee doesn't come in all climates, that's the question. Coffee has a range of between 1000 to 1500 m above sea level. That's the coffee zone. Already 1000 is very low, usually it's almost between 1300 and 1500. It is the optimal area to grow coffee. And then there are regions that are very hot, so it is no longer grown.”

Giancarlo Parolisi

“OK! so coffee needs a humid climate, right?”

Agronomic Engineer

“Exactly! But coffee does need a lot of water. If you don't supply water in the first few days of flowering, bad coffee tends to come out in terms of weight. I mean, you can see the seed but inside it has nothing, it is rafted, that is, it lacks of water for the almond to grow inside the kernel.”

“Right now, pest controls are generally being done with biological products, wasps that control the drill bit and all that, but these pests cannot be avoided completely”.

Giancarlo Parolisi

“So, if for example there is a pest in a crop, is there something that can be saved or usually the whole crop is damaged?”

Agronomic Engineer

“Always almost most of the crop, around 80%, is affected”.

Giancarlo Parolisi

“And how long does it takes since the seed is planted until the coffee can be harvested?”

Agronomic Engineer

"One year”.

Giancarlo Parolisi

“And finally, I understand that within the coffee grower, who is the one who harvests it, he chooses just the seeds that are red, right? ”.

Agronomic Engineer

“Yes, just the reds. That's why coffee here in Colombia has good quality, because generally the cultivation is done bean by bean, manually, so the coffee is practically going as selected. Equally, I've been looking at harvesting systems in other countries like Brazil, which are huge producers of coffee as well. They do it with machinery”.

“A machine comes and goes through the middle, the furrows, applying a kind of current to the tree, and the tree releases all the seeds, green or ripe. So, the coffee is all mixed and the final product will have a very poor quality. That’s why, harvesting is very important”.

Giancarlo Parolisi

“Definitely, human intelligence is never going to be the same as a machine. To conclude, about Colombian coffee brands, which one/s would you say are most positioned, or what type of coffee?”

Agronomic Engineer

“In terms of quality, I know that ‘Juan Valdez’ coffee is the number one maybe here in Colombia, which is the associate with the highest quality coffee. This would be followed by ‘Sello Rojo’ and ‘Águila Roja’ coffee, which have very good quality, because I consume them, as they are the most common brands that people consume in Colombia, because Juan Valdés coffee is more consumed by wealthy people.”

"For instance, in ‘Juan Valdez’ one ‘tinto’ will cost 8,000 COL\$. On the contrary, a ‘tinto’ in a regular cafe would cost not more than 2000 COL\$. So, the difference is incredible, it's four times more.”

“Colombia is producing as well ‘organic coffee’, which is a coffee with no chemicals. That coffee has a lot of acceptance in the market, because it's a very natural one. I also think that the quality of that organic coffee, from a plant where no chemical product has been added to it, is of very good quality.”

Giancarlo Parolisi

“Wow! It’s interesting, because, honestly, I’ve heard about ‘organic coffee’, but I didn't know that it was also in the market. In other words, there is a market niche for organic coffee.”

Agronomic Engineer

This coffee has a very good outdoor market, they pay for it very well. In fact, there are places here where people are exporting and selling it abroad because they pay it well, they already have their contracts, their contacts abroad and all that coffee is sold abroad. But yes, as I say, they're free-chemical coffees”.

Giancarlo Parolisi

“That's what you were telling me about the measures against pests with wasps, that is, using them as natural mean, right?”

Agronomic Engineer

“Exactly! I was working on a program that the FNCC had here, which was the control of the borer based on parasitoids. Parasitoids are wasps, which are small animals that only feed with ‘coffee borer’. So what the objective was to cultivate wasps in the laboratories, leave on the crops infected and lower the level of infestation”.

“Nowadays, the wasp is winning, so most of the coffee-growers aren’t affected the same as it was in a few years when it just started, that more than 50% of the harvest was lost because of it”.

Giancarlo Parolisi

“So, as I can see, these are all means that are being researched in some way and modernized to be able to support the Colombian economy, because I imagine that a large proportion of it depends on coffee”.

“And did you study anything apart from the experience you have related?”

Agronomic Engineer

“I studied agricultural technology; I am an agricultural technician and practically I grew up in the countryside planting coffee and cultivating”.

Giancarlo Parolisi

"Well, what better way to get to know the sector than by doing it firsthand, because in the end, the study, as I say, is just theory, but then when you really learn is by practice”.

“And regarding coffee harvesting, how much need a coffee farmer to harvest daily? I imagine that they use the picking more for their own consumption than for business, right?”

Agronomic Engineer

“When the moment of harvest comes, people go from crop to crop. Coffee pickers can't leave everything for consumption they need to sell it. They usually sell by weight, ‘Café colorado’, which is the coffee before the milling, before it is pulped. So, the buyer pays for it by ‘arrobas. There are people who gather up to 30 ‘arrobas’ when coffee offer is very high”.

Giancarlo Parolisi

“And what about the value? Well, I imagine it must have changed through time, but, approximately, how many do they pay by ‘arroba’?”

Agronomic Engineer

“The 'arroba' is a measure of 25 pounds. I couldn't give you that data right now because I'm kind of unlinked from that sector, so I don't know how much they are paying for it”.

Giancarlo Parolisi

“Well, the thing is to know if there are people who make a living from collecting coffee, selling it by arrobas, right?”

Agronomic Engineer

"Of course, sir! There are people who sell everything they harvest, for example the farmer, because there are those who sell it green, that is, without drying the almonds. And there are those who dry it, because they will also get a better price when you dry the coffee that is almost ready to roast”.

Giancarlo Parolisi

“And the washing process consists of using some special liquid or just pure water?”

Agronomic Engineer

“It's just water. What you must do is first let it ferment. For example, you pick the cherry today and tomorrow afternoon it's ready for washing, then you release all the mucilage with the clean water. It's all supernatural. People in the old days didn't have a technical means, machinery, so they still maintain the tradition”.

Annex 4: Questionnaire

The purpose of this questionnaire is to analyze the main habits people have when they drink coffee. This survey is a primary investigation that will serve as a source for a much broader investigation of the coffee sector, in general terms, for which reason the more exact and sincere your answers are, the more detailed the analysis of this investigation will be. Your answers will be anonymous and the questionnaire will have an approximate duration of no more than 5 minutes.

I authorise that the answers given in this questionnaire may be used for further analysis.

- Yes
- No

Do you consume coffee?

- Yes
- No

At what time of the day do you used to consume coffee?

- In the morning
- Before lunch

- After lunch
- All of them

How many cups of coffee you used to drink daily?

- Between 1-2
- Between 2-4
- 5+

Which is/are the reasons why you consume coffee?

- To wake up
- For the taste
- To increase my performance

Where do you used to consume coffee?

- Cafes
- At home
- At work

Which preparation method(s) you usually use to make your coffee?

- Italian coffee maker
- French Press
- Espresso machine
- Coffee vending machines
- Instant coffee

Do you used to add something to your coffee?

- Milk
- Sugar
- Both
- None

How important is for you the designation of origin/brand of your coffee?

- Not at all important
- Slightly important
- Moderately important
- Very important
- Extremely important

Are you willing to pay more for a premium/specialty coffee?

- Yes
- No

How do you perceive Colombian coffee?

- Exclusive
- Good taste
- Well-recognized
- Overrated
- Expensive
- I don't consume it

Are you willing to pay more for a premium/specialty coffee?

- Yes
- No

Which is your weekly expenditure on coffee?

- Less than 5 €/€
- Between 6-15 €/€
- More than 16 €/€

Do you consider drinking coffee as a healthy habit?

- Yes
- No

Are you concerned about the socio-environmental impact that coffee production has on its countries of origin?

- Yes
- No

What gender do you identify as?

- Male
- Female
- Other: _____

What is your age range?

- 18-25
- 26-40
- 41-60
- 61+

Please specify your ethnicity.

- European
- Hispanic American
- North American

- Asian
- African
- Other: _____

What is the highest degree or level of education you have completed?

- Less than high school degree
- High school diploma
- Bachelor's degree
- Master's degree
- Doctoral degree

Which of the following categories best describes your employment status?

- Employed full time
- Employed part time
- Student
- Not employed
- Retired