

From Volatility to Vision

The Next Era of Coffee Growth



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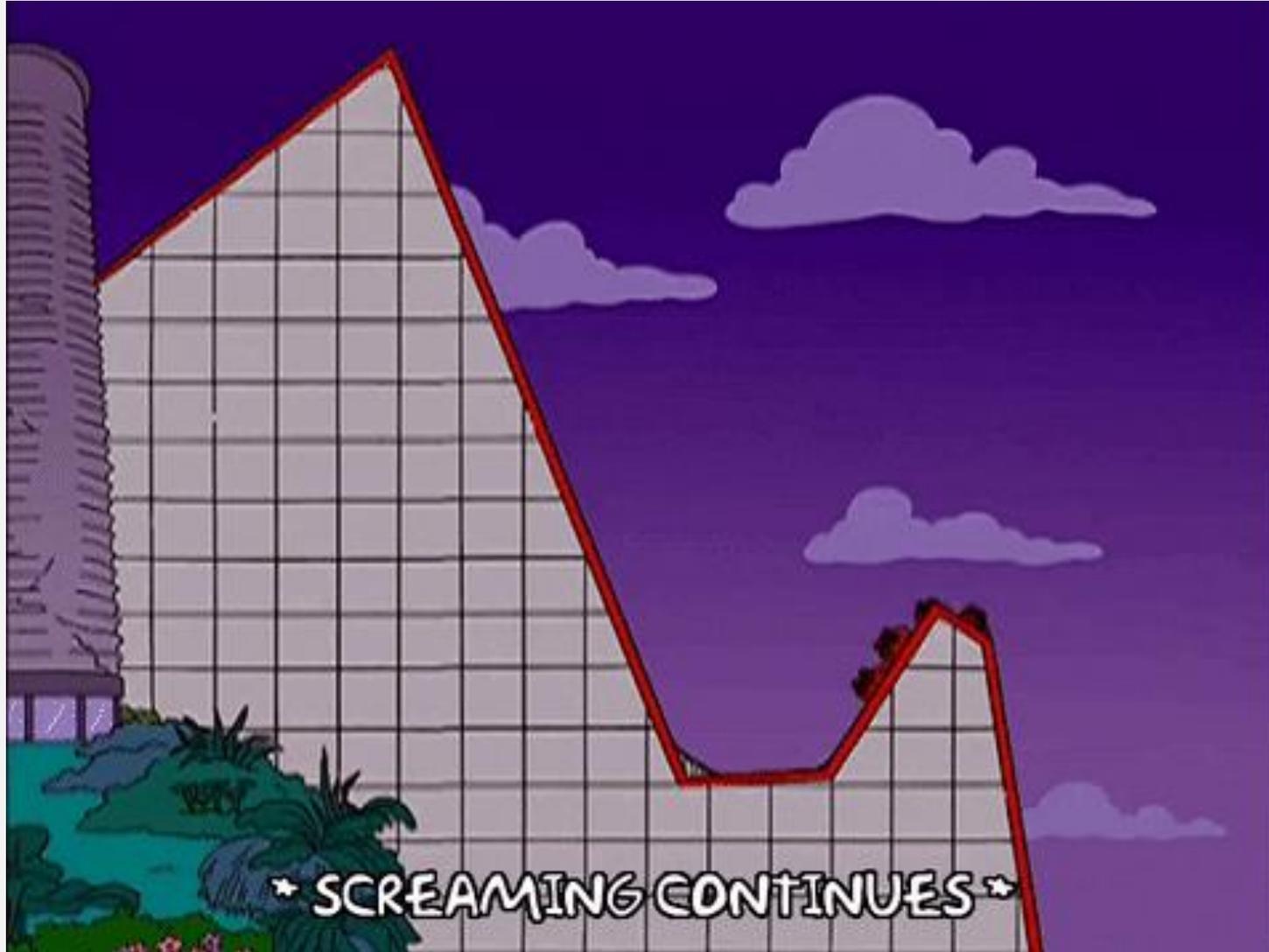
The Next Era of Coffee Growth



Today's Agenda

1. Missing the Quiet Days
2. Not Your Grandfathers Production
3. Sustainability is Dead
4. What Climate Change...Logistics and Geopolitics, meh.
5. Will AI Replace me?
6. Does Anyone Survive Industry Consolidation?
7. Play Smart, Get Paid

Coffee Market Volatility



COFFEE 2! Last: 297.75 O: 295.00 H: 299.70 L: 294.85 C: 297.75 Δ: +4.90 %: +1.67%

1994 - 2024

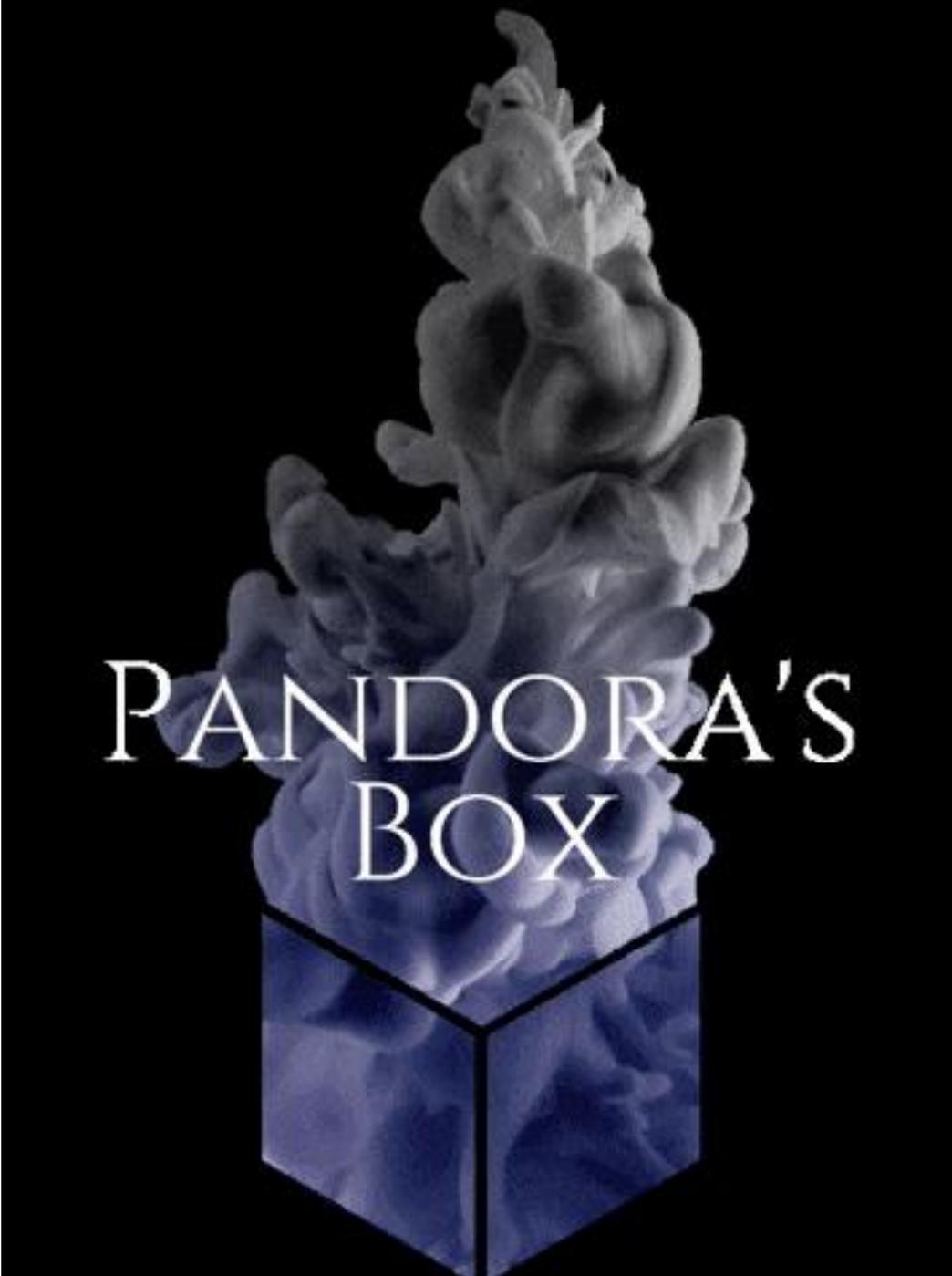


nca
CONVENTION
2026
TAMPA, FLORIDA
MARCH 12-14

%COFFEE 2! Last: 341.80 O H L C Δ %

2024 - 2025

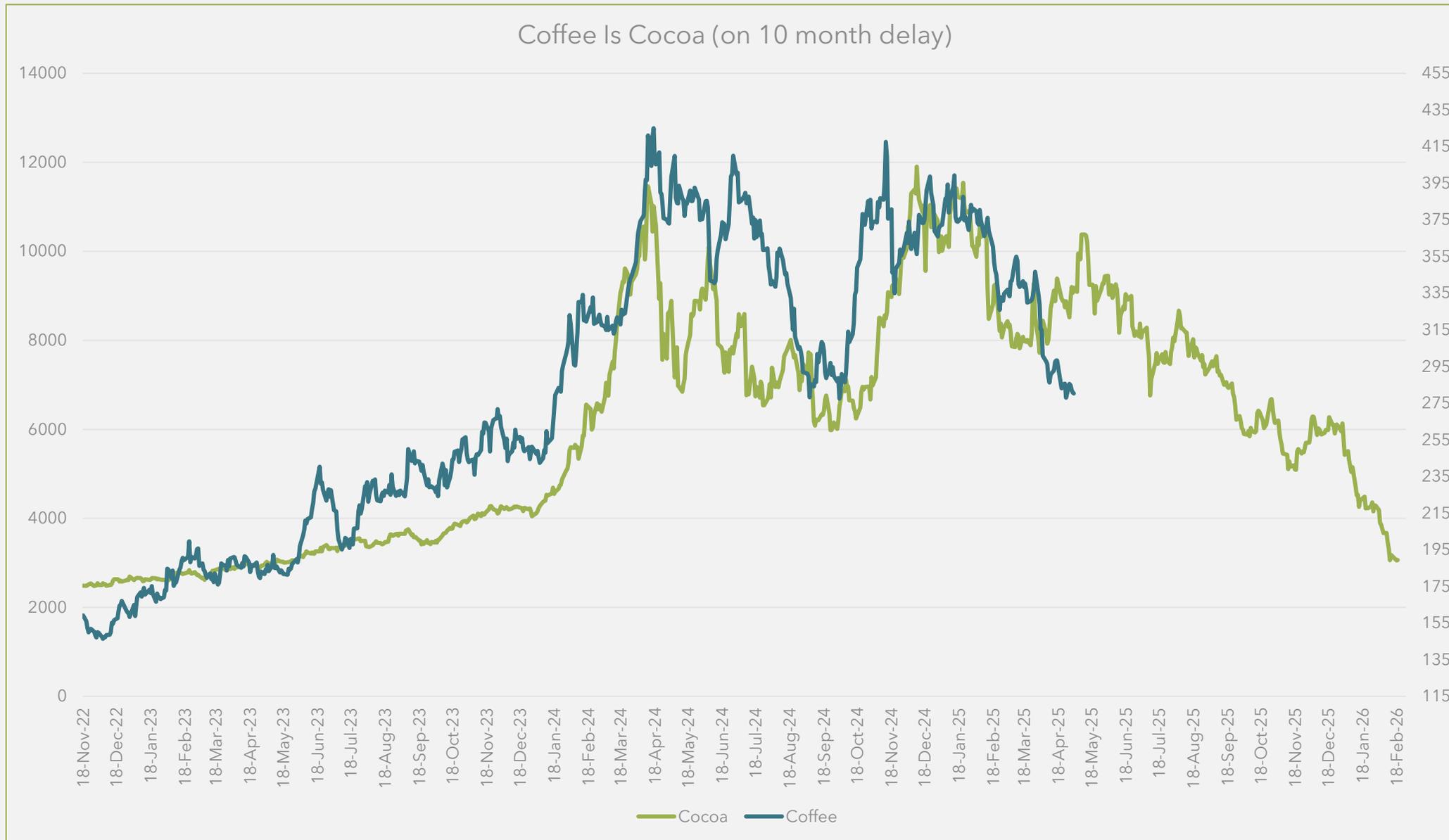




PANDORA'S
BOX

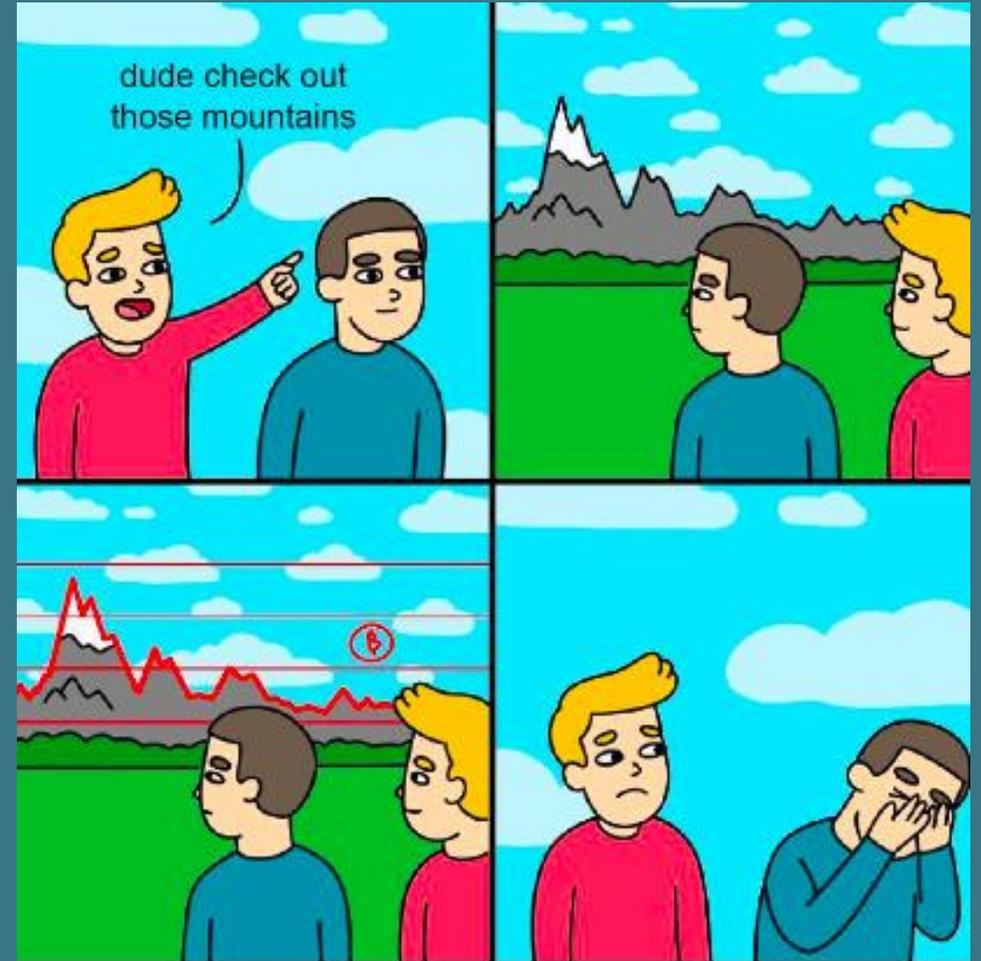


Is Coffee The New Cocoa???



Takeaway #1

The market has already moved – the only question is whether your hedging strategy has too?

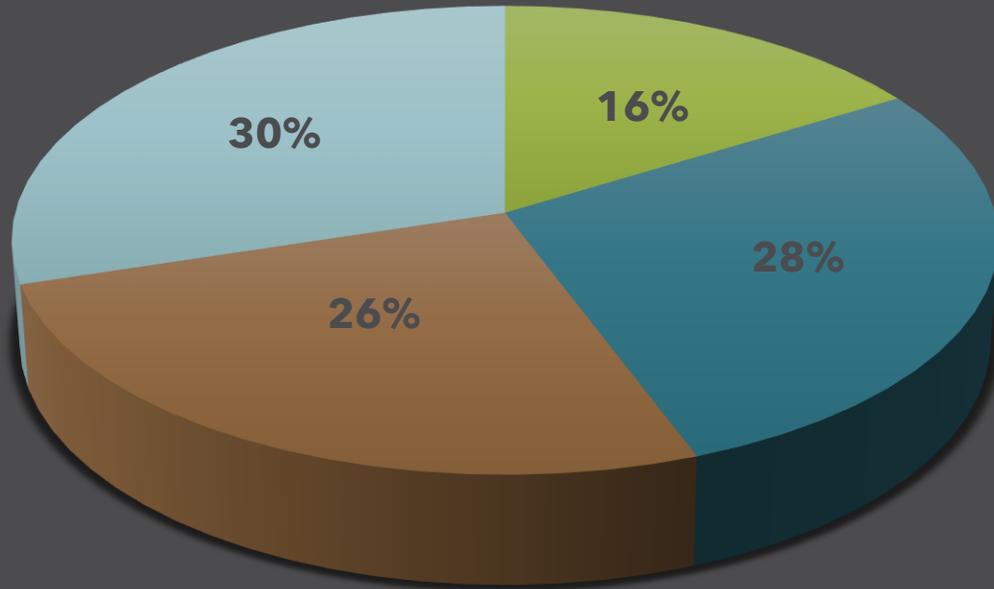




Shifts In Production

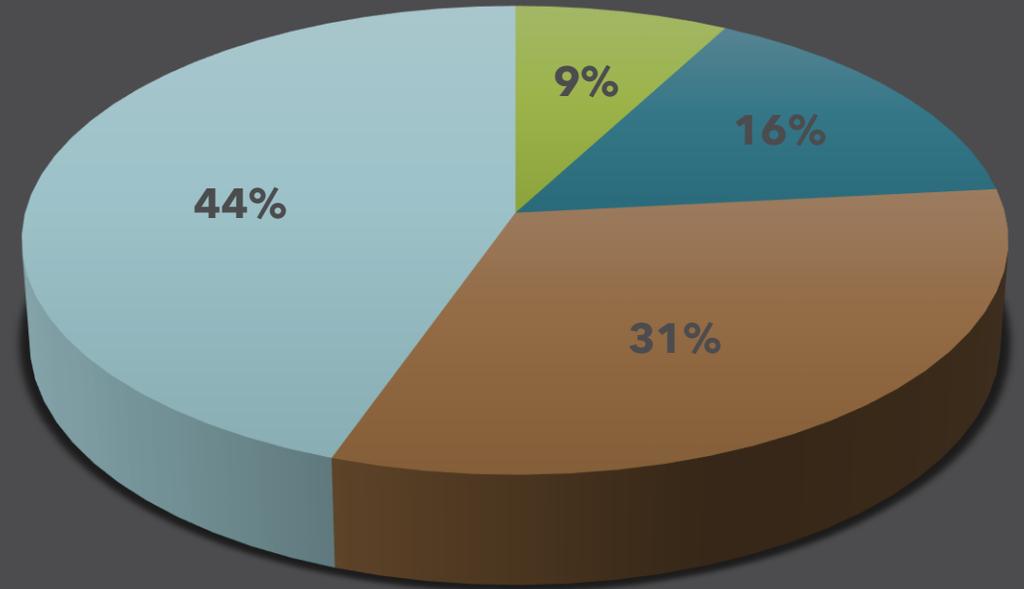


1994 / 1995



■ COLOMBIAN MILDS ■ WASHED MILDS
■ NATURAL ARABICAS ■ ROBUSTA

2024 / 2025



■ COLOMBIAN MILDS ■ WASHED MILDS
■ NATURAL ARABICAS ■ ROBUSTA

Takeaway #2

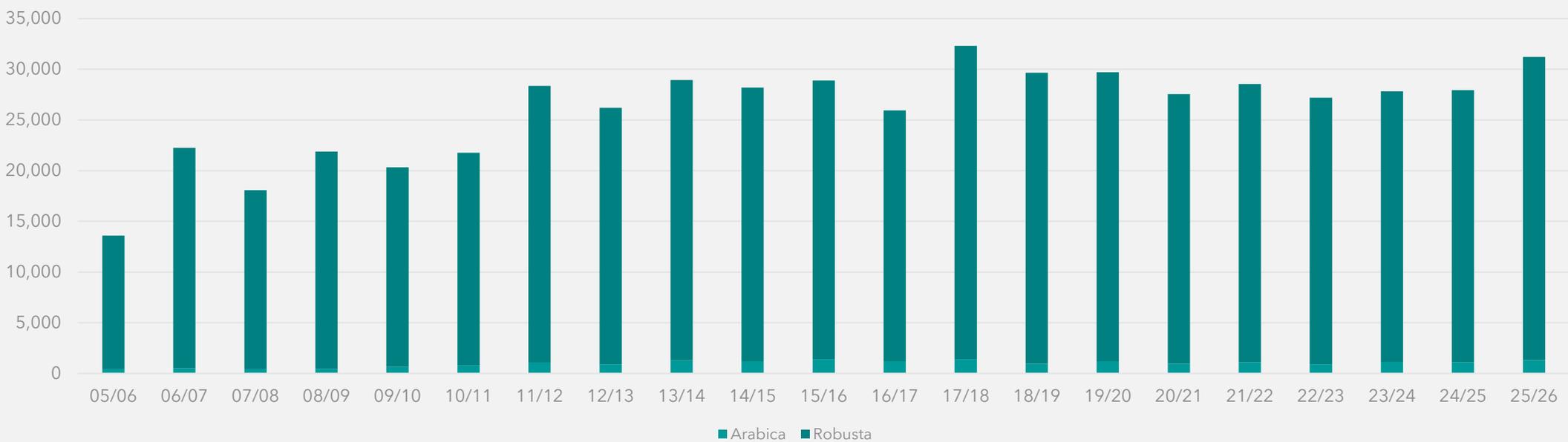
The question isn't whether you'll have a Robusta strategy... it is whether you will design it – or inherit it.



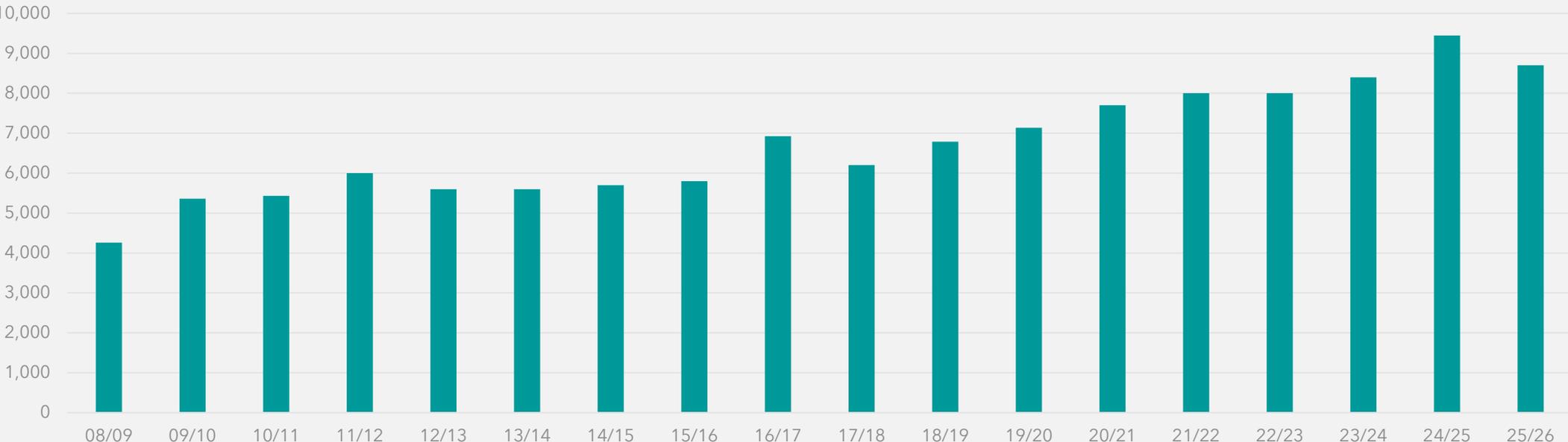
Brazil Production



Vietnam Production



Ethiopia Production



Uganda Production



Arabica Robusta



Takeaway #3

Volatility is geographic.

Optionality is strategic.

Don't sleep on East Africa





Sustainability is Dead...
Long Live Sustainability

FINCA MONTEVERDE
- SUSTAINABLE COFFEE -
REGEN

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Coffee Sustainability Eras

Pre 1995

Two telephones

1995-2000

Farmer inclusivity

2000-2015

Mainstreaming of certification (Fair Trade, Rainforest, etc)

2015-2020

Climate adaptation
Gender mainstreaming
Access to finance

2020-2025

CSRD /CSDDD
EUDR
US Tariff Act (forced labor)
Regenerative agriculture
Living Income
Responsibly sourced
SBTi

VOLUNTARY

REGULATORY



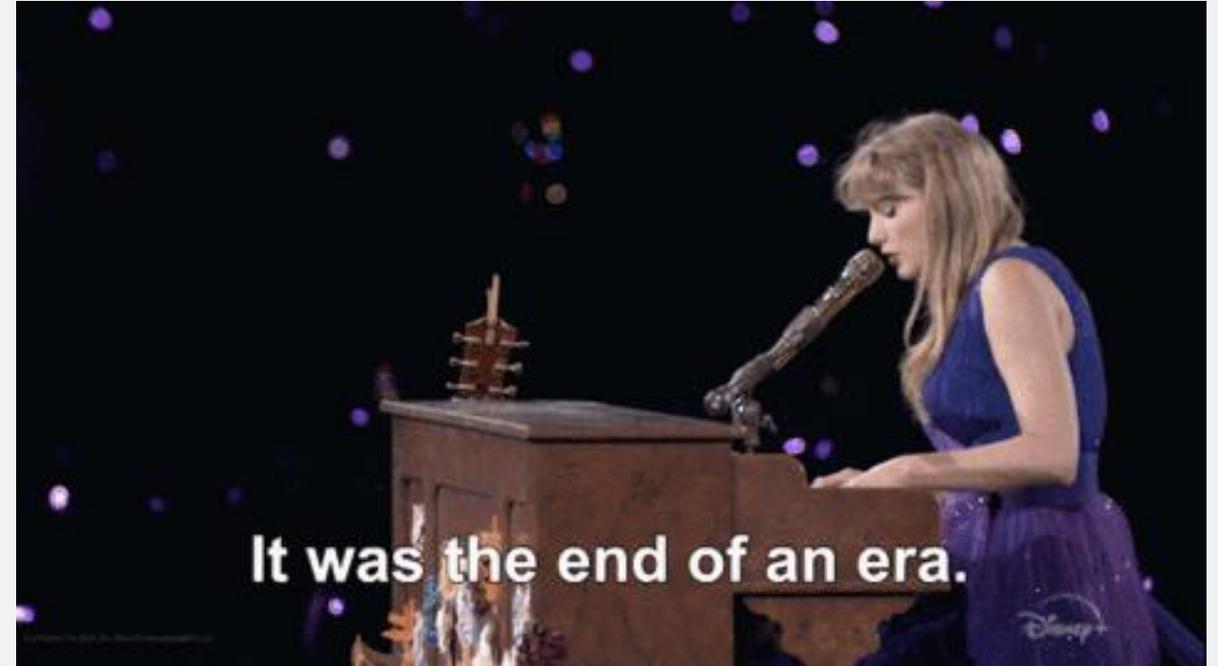
New Trump Administration Directives to Repeal Environmental Regulations En Masse Make 'No Sense,' Legal Experts Say

Experts in environmental and energy law said the effort "reflects a complete lack of understanding of how government works."

Trump administration set to revoke basis of US climate regulation

By Valerie Volcovici

February 12, 2026 2:53 PM GMT+1 · Updated 2 hours ago



European Council
Council of the European Union

Home > Press > Press releases

Council of the EU | Press release | 18 December 2025 17:35

Deforestation: Council signs off targeted revision to simplify and postpone the regulation

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Takeaway #4

Regulations will wobble. Consumer expectations won't.

Brand investment in sustainability extends its own lifespan.

Sustainability is entering its boring era - and that's when it gets real.

Regulation is like a bear and we are in winter.

"Coalition of the Willing" -> "Coalition of the Silent"

Weather, Farmers, Logistics & Geopolitical Risks



Weather, Farmers, Logistics & Geopolitical Risks

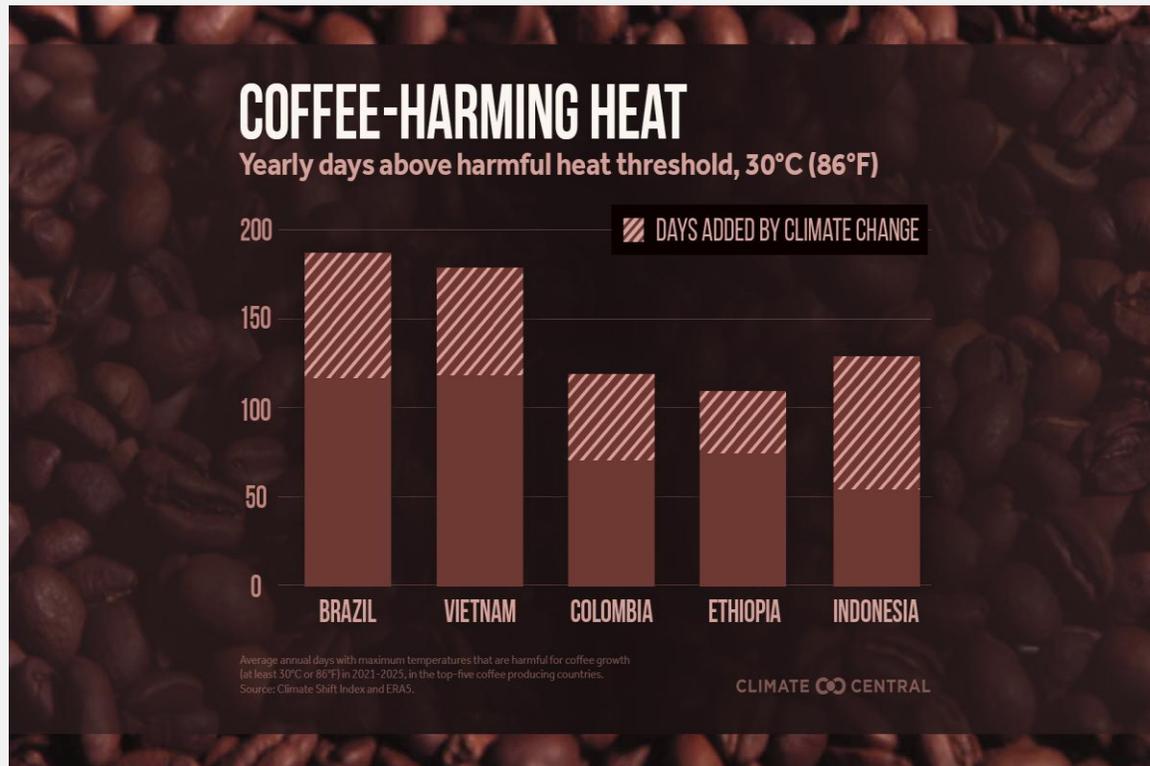


The Planet Is Getting Hotter

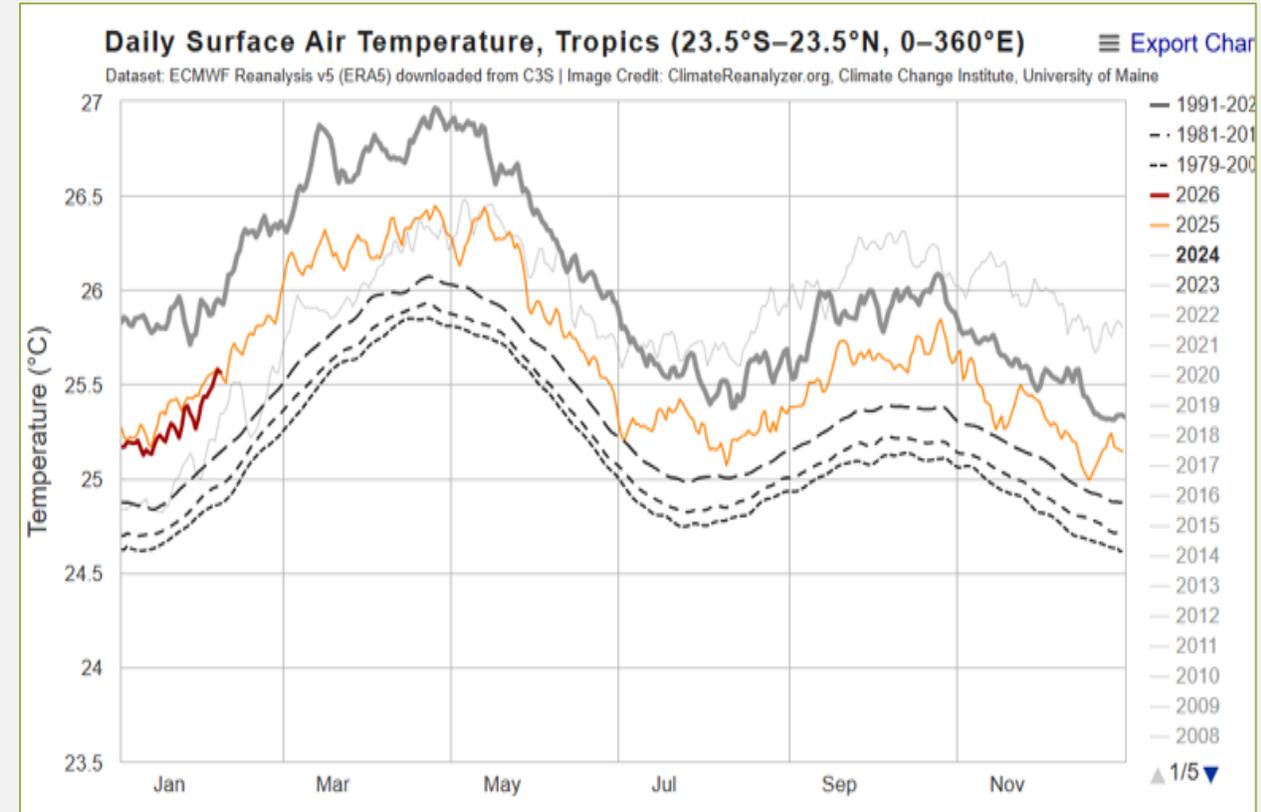
WORLD NEWS FEB. 18, 2026 / 2:23 PM

75% of global coffee supply faces rising extreme heat, analysis says

https://www.upi.com/Top_News/World-News/2026/02/18/latam-coffee-growers-extreme-heat-analysis/3251771441257/



<https://www.climatecentral.org/climate-matters/more-coffee-harming-heat-due-to-carbon-pollution-2026>



US Tariff Policy



Red Sea / Panama Canal / Brazil Ports / Colombian Strikes



Waiting for your coffee to be shipped...



Takeaway #5 (a and b)

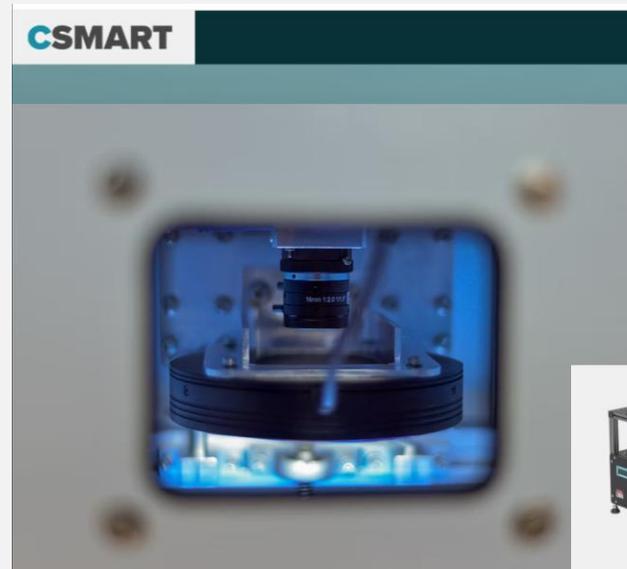
Investment in coffee variety research is a NEED not a WANT.

Origin diversity is your hedge.

THIS HERE IS CALLED AI

**YOU ASK IT QUESTIONS,
AND IT CONFIDENTLY LIES TO YOU**

AI: Operational Efficiency

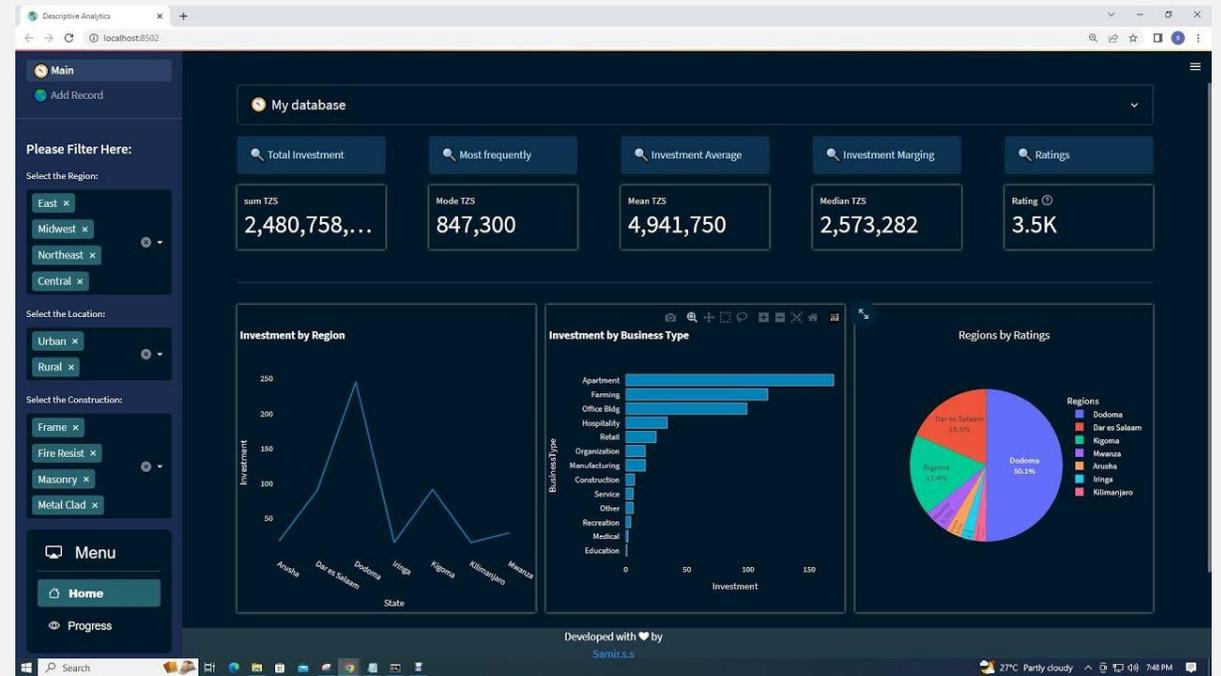
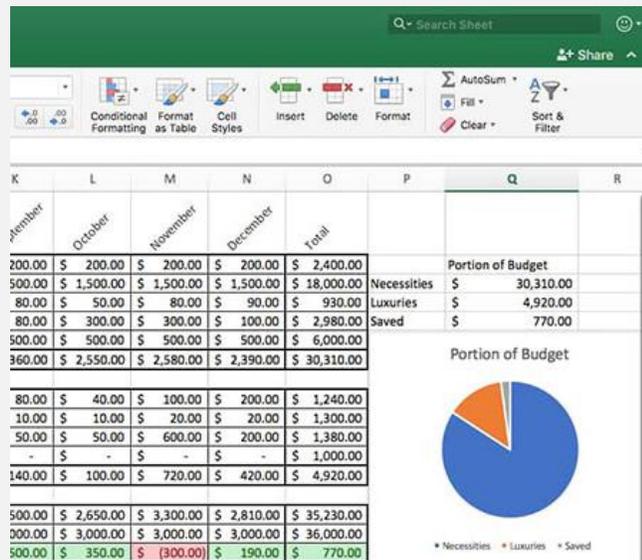


CSMART DIGIT
What if one could accurately classify green coffee, extract quality data, generate grading reports, and store images of every seed using just one device? CSMART Digit is designed to collect and analyze data on a grand scale while providing transparency and traceability. Here, coffee meets artificial intelligence.
[product page](#)

CSMART P20
The color sorter for coffee cherries is equipped with 20 channels conveyor belt, embedded computer vision system, high-speed CMOS camera, proprietary software. Fast-acting valves and modular assembly for easy maintenance and upgrades.
[product page](#)



AI: Trading and Research



AI: Personal Growth and Training



Hackathon Winners Announced

Hackathon Winners Announced: Fixing the Grind!

Huge shoutout to everyone who rolled up their sleeves for the "Fix the Grind" hackathon! The energy was incredible, and the solutions you built for our "Grassroots AI" initiative proved that we can solve real problems when we collaborate. 🙌

As a reminder, our winners were picked based on **Business Impact (40%)**, **Feasibility (30%)**, **Clarity (20%)**, and **Innovation (10%)**.

Drumroll please... 🥁

The Top 3 Teams are:

- 1st Place:** Covenant Compass (Lebanon) by [Elissa Hanna & Marc Hobeiche](#)
- 2nd Place:** Quality Blender (Brazil) by [Beatriz Kalb, Josiel Medeiros, Kalke Silva & Romulo Dias Rocha](#)
- 3rd Place:** Position Consolidator (Switzerland) by [Bart Skala, Jamie White & Tommie Schretlen](#)

Missed the demos?
Check out the short videos of all the projects in the shared folder below: 📁 [\[Link to Shared Folder\]](#)



MakeSong

Create Song Music Video Image Gen Pricing Contact

English

Hondos to Houston

Rap

1/12/2026 2:44

Play Share Reuse Lyrics Make Song

<https://www.makesong.com/music/3bd67dce-dbdb-4af1-8e16-bdf84ce2af51>

Technology in Sustainability Data



Which do you trust most to be real?

Takeaway #6

AI is NOT coming for your job, but it is coming for your excuses.

The expected output/employee will continue to rise exponentially.

Those that embrace change will outperform peers by 2-5x.

INDUSTRY CONSOLIDATION



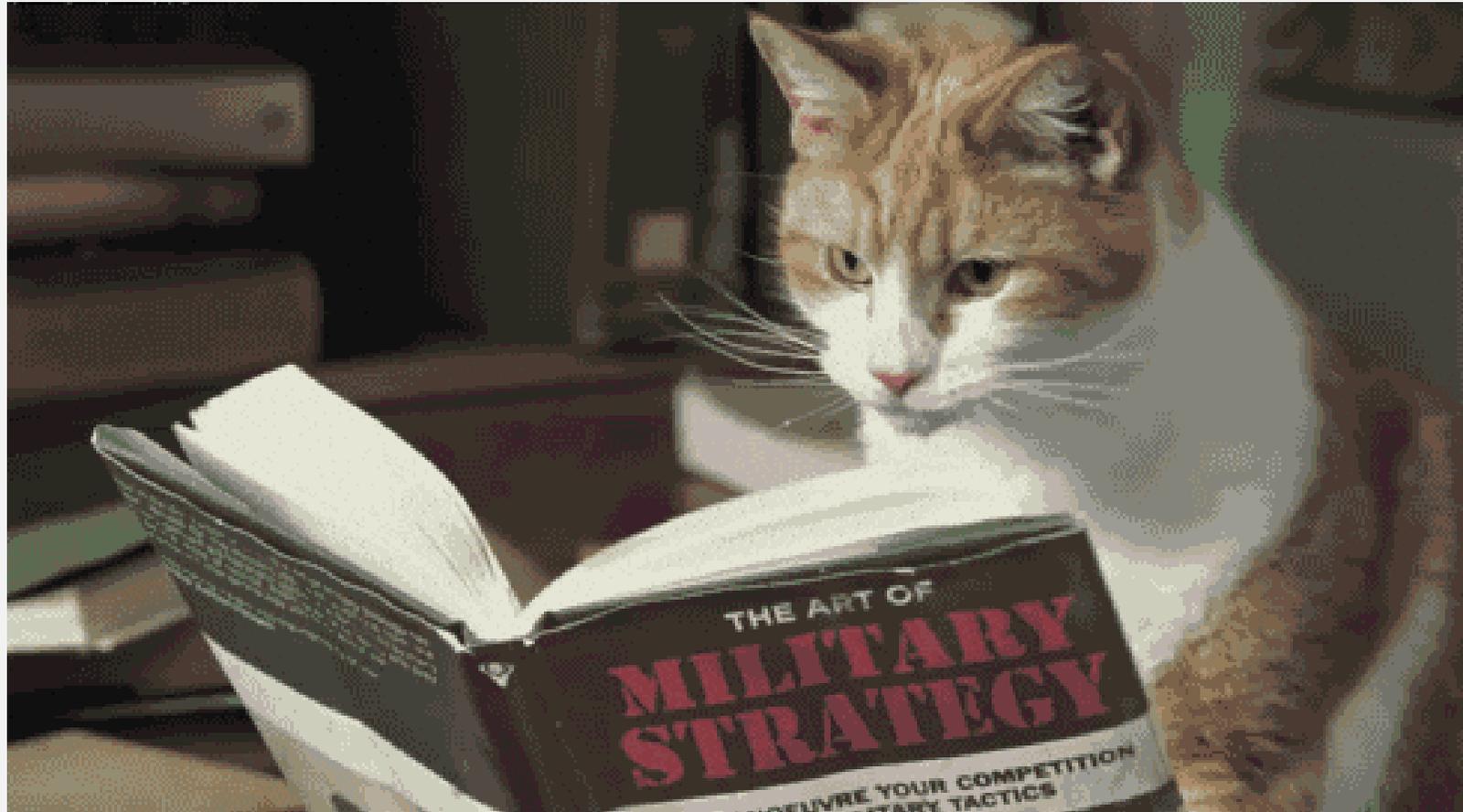
Takeaway #7

Consolidation doesn't mean the game stops.
It means fewer seats at the table.

Roasters are consolidating.
Supply chain participants are existing or being absorbed.

Scale is becoming a prerequisite, not an advantage.

The Winning Playbook



Winning Companies All Recognize

Strategy can't be built for 5 to 10 year visions anymore.

The key is recognizing transitory changes vs. regime change.

The need to maintain a certain urgency toward innovation.

Ethics and values matter for long term success.

People, not AI, remain a company's most important asset!!!

THIS IS FINE



Two-thirds of American adults had a coffee yesterday

...and I suspect that one-third lied!



Thank You!



Dave Behrends
Managing Partner and Head of Trading



www.sucafina.com