# AFRICAN COFFEE SECTOR

*addressing national investment agendas on a continental scale*

*Cameroon Case Study*



Sector study conducted by Agri-Logic and Valued Chain by assignment of the Global Coffee Platform
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# INTRODUCING NATIONAL COFFEE INVESTMENT AGENDAS FOR AFRICA

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## CHALLENGE:

- Currently Africa only supplies 10% of global coffee volumes, while coffee was first discovered in Ethiopia.
- In most African origins, yields are low, quality is inconsistent, and supply chains are inefficient.

## OPPORTUNITIES:

- Buyers value certain coffees from Africa for their quality, and there is a potential to increase volumes to meet growing demand.
- Coffee may contribute to sustainable development in Africa's rural areas.

## INVESTMENT AGENDAS:

- Greater understanding of challenges and opportunities in mainstreaming sustainable coffee production.
- Insight into required funding, return on investment, and possible public and private contributions.
- Insight into impact of investment based on quantitative research and stakeholder consultation. Benchmarks and analysis are based on 2015 data.
- Full reports available on the GCP website for Angola, Burundi, Cameroon, Côte d'Ivoire, Ethiopia, Kenya, Rwanda, Tanzania and Uganda.

# CONTENT OF THIS REPORT



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# INVESTMENT OPPORTUNITIES ANALYSIS

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- The following slides describe the required investment (cost) and expected returns (revenue), as well as the expected impact on price, volume, quality and livelihoods.
- Investments are analysed on a sector level: total increased revenue in relation to total additional cost. On a sector level, all of these opportunities present a positive return on investment.
- Cost and benefits may not be attributed to the same actor in the value chain (e.g. government and buyers pay for farmer training, while the farmer gains most of the additional revenue from yield increase).
- Also, specific interventions may not lead to additional value creation, but to a redistribution of value within the chain (e.g. farmer grouping can lead to higher farm gate price, while export price and GDP contribution is not affected).
- Investment contributions are indicative based on stakeholder input. Investments and conditions to be negotiated within national public private platforms taking into account amongst others international competitiveness, governance, transparency and accountability assurance.

# INVESTMENT AGENDA FOR THE CAMEROONIAN COFFEE SECTOR – EXECUTIVE SUMMARY

- Between 2001 and 2015, **coffee supply from Cameroon declined by 5.3% per annum**. Farmers with access to other opportunities moved out of coffee as prices declined. Of those that remain many are "pure-play" coffee farmers.

- Cameroon has an estimated 73,000 coffee farmers. **Cost of production is low**. Even with additional investment in inputs and rejuvenation, cost of production in Cameroon would remain competitive compared to Vietnam, where prices for labour in particular have increased significantly. **Currently, fluctuating production, quality concerns and high export taxes affect competitiveness.**

- Farm size is on average 1.9 ha, significantly larger than those of other robusta origins in Africa such as Uganda (0.24 ha) or robusta export market leader Vietnam (1.1 ha) but **productivity is lagging far behind** that of other origins.

- The internal market is dominated by exporters and licensed buying agents that run small-sized dry mills. The top-4 exporters control over 64% of the exports. At the moment just one of them is investing in farmer support programmes. More of this is needed as additional investment is unlikely to come in from importing markets. **The majority of Cameroonian exports go to markets that do not show a high willingness to make these types of investments**.

# INVESTMENT AGENDA FOR THE CAMEROONIAN COFFEE SECTOR – EXECUTIVE SUMMARY

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- There is significant potential to increase coffee sector value in Cameroon through selective investment in farmer training, farm rejuvenation, use of inputs and in-country processing. **Over a period of 10 years a cumulative investment of ~100 million USD** (~28 million USD in farmer training, 10 million in rejuvenation, 60 million in inputs and 1 million in quality improvement) **can create ~500 million in additional value** over the same 10 year period at today's coffee and input prices.
- **The share of certified sustainable exports from Cameroon is ~10%,** a factor 2.5 higher than the continental average of 4%, yet this does not appear to do much to address low productivity.
- **Productivity could increase by a factor 1.8** over 7 to 9 years. This requires large scale investment in a combination of farmer training, rejuvenating 30% of the tree stock and facilitating access to inputs.
- **Differentials could firm up** once supply has recovered and quality issues are addressed.
- When the effects of these investments kick in the **export tax could be reduced** gradually to further enhance competitiveness of coffee versus other crops.
- Much of the added value created through such investments flows into the rural economy.
- **Farmers' incomes can double**, but coffee alone will not provide sufficient income to lift the average farmer household above the poverty line of 1.9 USD/day.

# CAMEROON

Focus on yields, rejuvenation and quality

# POSITIONING OF CAMEROON

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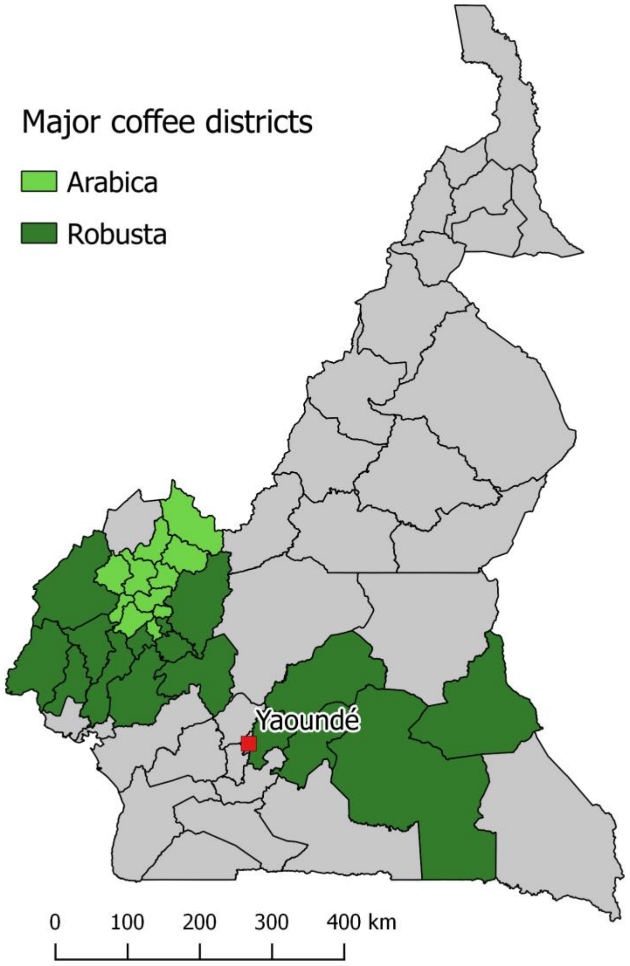
| Item | Value |
|---|---|
| Total volume (3 year average) | 30,700 Mt |
| % of global production | 0.38% |
| % Arabica – Robusta | 11% – 89% |
| % natural – semi-washed – fully washed | 89% – 10% – <1% |
| Compound Annual Growth Rate of coffee production (2000-2015) | -5.3% |
| Main export markets | Italy, Portugal, France, Germany |
| Market segments | Predominantly mainstream robusta |
| GDP | 32.10 billion USD |
| GDP – agriculture | 7.11 billion USD |
| GDP – coffee | 0.06 billion USD |

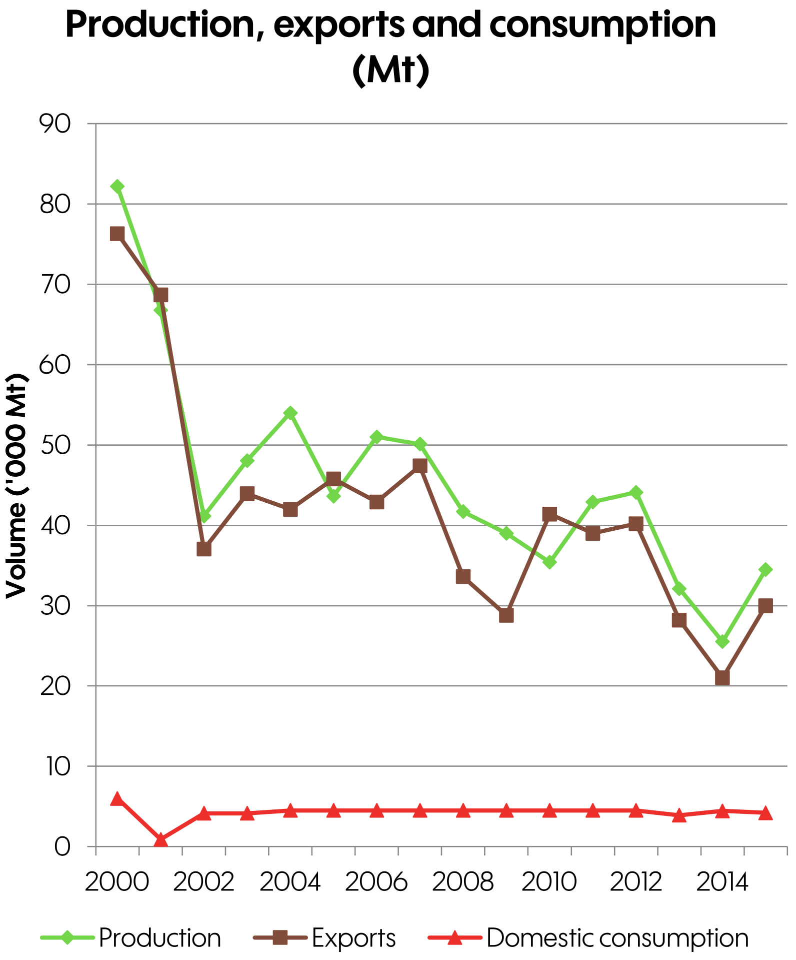
# CAMEROON COFFEE PRODUCTION AREAS BY DISTRICT AND COFFEE TYPE




- Robusta production is found in the South-west, East and Littoral regions.
- Arabica is concentrated in the higher altitude areas of the North West Region, with some scattered plantations in the west province.
- Population densities in the North West Region and West region are >3 and >4 times the national average of 22.6 people per km² respectively.
- Population density of East region is low at 5 people per km² and may have scope for expansion of acreage under coffee.

Sources: Census data, interviews, AL and VC analysis

# CAMEROON PRODUCTION HAS WITNESSED A STRONG DECLINE




- The "coffee-crisis" reduced supply significantly.
- Compound Annual Growth Rate is negative: -5.3%.
- Previously important areas, especially near main transport arteries, have switched to vegetable production, some replacement with cocoa and palm oil when prices crashed.
- In recent years there is a large and growing gap between registered exports from the National Coffee and Cocoa Board and production minus domestic consumption. Different sources indicate this is due to export tax evasion by a small number of companies.
- Funding for research and extension is very limited.
- Domestic consumption is stable and is unlikely to grow significantly in the short to mid-term.

Sources: USDA, interviews, AL and VC analysis

# AFRICA LAGGING IN SHARE OF CERTIFIED SUSTAINABLE SUPPLY

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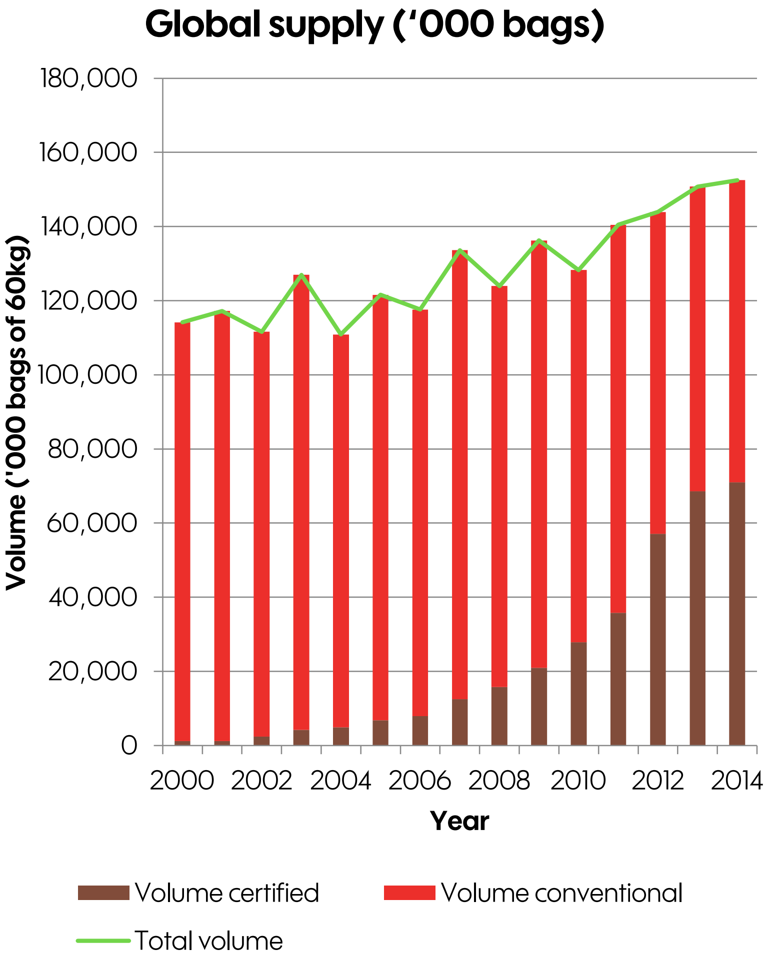
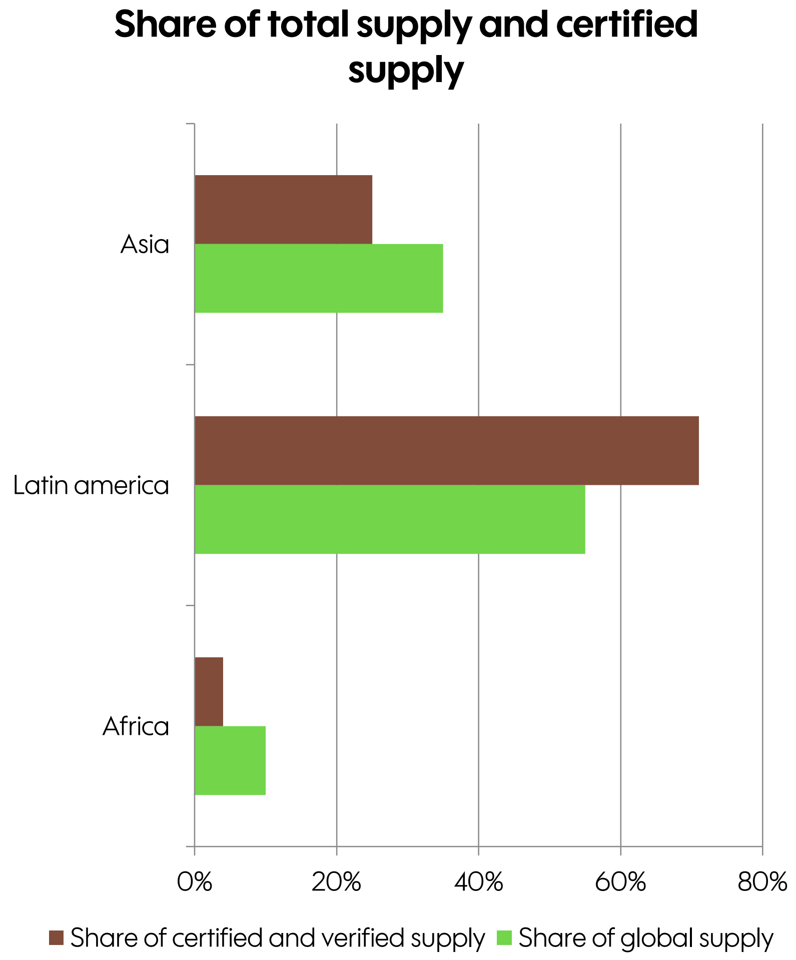
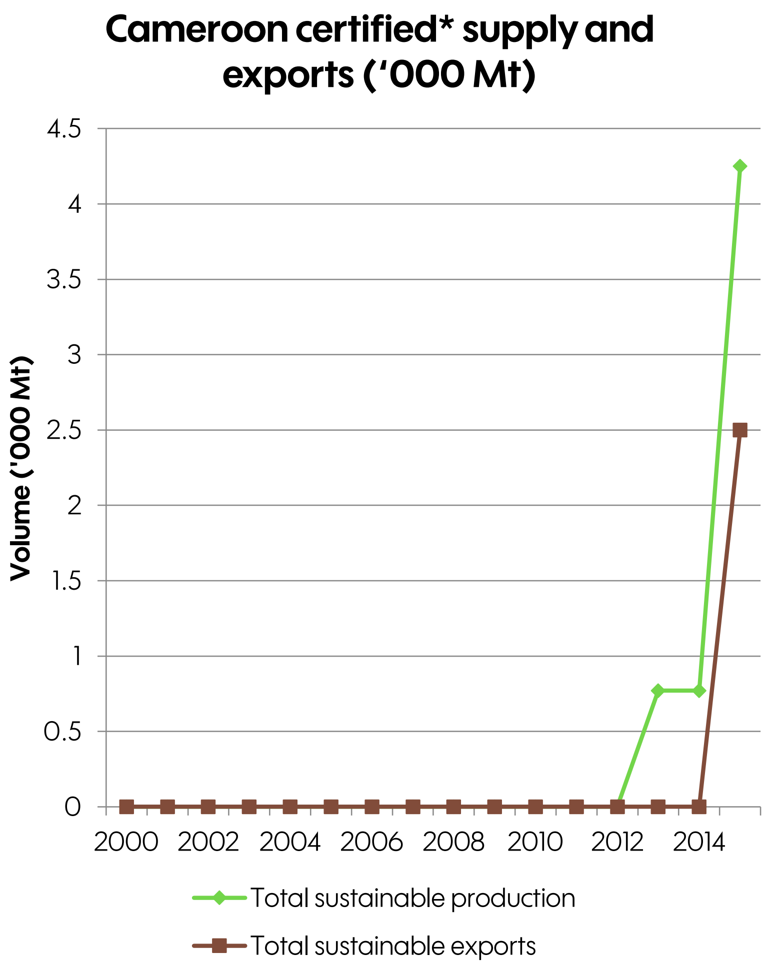



Sources: USDA, CTA, AL and VC analysis

# MARKET SHARE OF CERTIFIED COFFEE HIGH IN AFRICAN CONTEXT

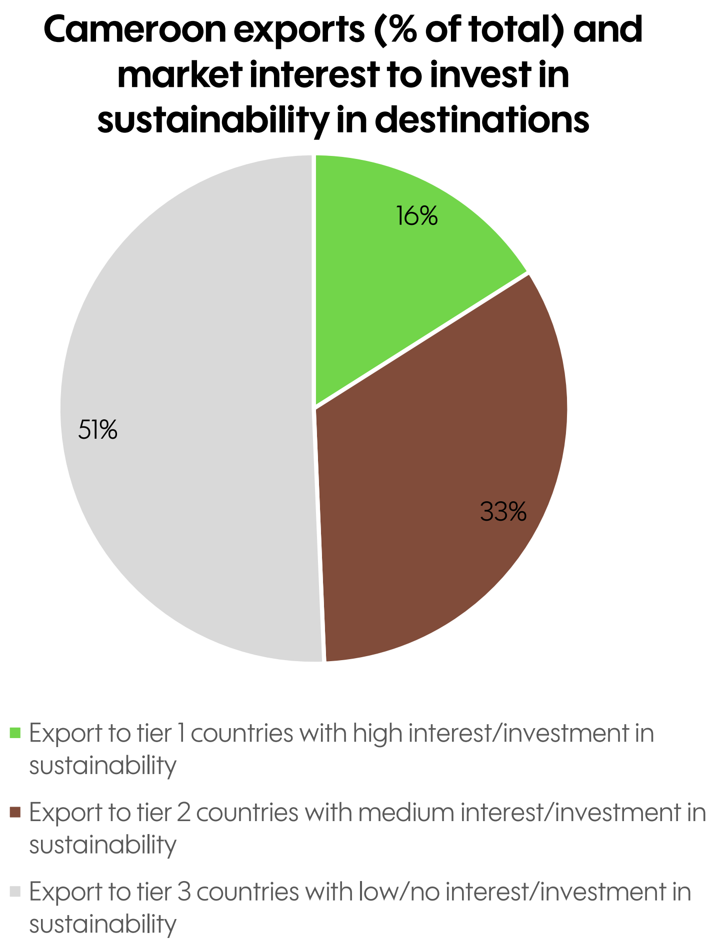



* Combined volumes of 4C, UTZ, Rainforest and Fairtrade

- Cameroon came late to the sustainable game but caught up quickly.
- Certified sustainable exports are ~10% of total exports against an average of 4% on the African continent.
- Marketability rate (share of certified exported divided by certified sustainable production) is 58% while the global average is ~30%.
- A single company is implementing sustainability certification.
- Despite exports of certified coffee, premiums do not materialise.
- Some clients use certification as a 'license to operate' and this is likely to increase.

Sources: Industry interviews, AL and VC analysis

# EXPORTS OF CAMEROON TO MARKETS WITH LOW INTEREST IN SUSTAINABILITY

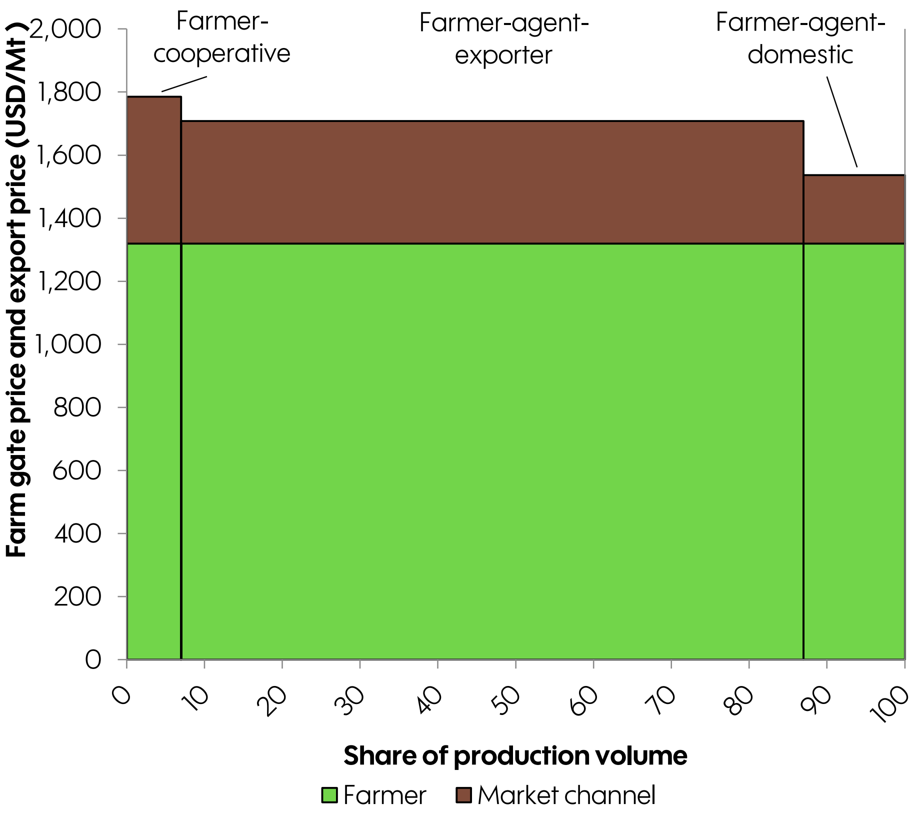



- Tier 1 markets: USA, UK, Switzerland, Germany, Netherlands.
- Tier 2 markets: France, Belgium, Italy, Spain, Scandinavia.
- Tier 3 markets: rest of southern Europe, all others.
- Most of Cameroon exports are to tier 3 markets, assuming no re-exports from first destination.
- It is unlikely that much investment in Cameroon sector will originate from importing markets through coffee roasters.
- Quality improvement and greater availability could result in better access to tier 1 markets in the mid- to long-term.

Sources: NCCB, VC and AL analysis

# LOCAL MARKET DOMINATED BY AGENTS AND EXPORTERS

## Value chain structure Cameroon Robusta 2015




- 3 different market channels characterise the local market.
- The role of cooperatives is limited, <10% of market share.
- Competition on the internal market can be fierce, little differentiation in farm gate price.
- Bulk of exports in hands of private sector, working through agents (LBAs and usines).
- Four companies are responsible for 64% of registered exports.
- Differential has come down over past few years from 100-150 USD/Mt to 50 USD/Mt over ICE due to quality concerns and fluctuating production.

Sources: NCCB, interviews, AL and VC analysis

# SECTOR CONSISTS PREDOMINANTLY OF MID-SIZED FARMS

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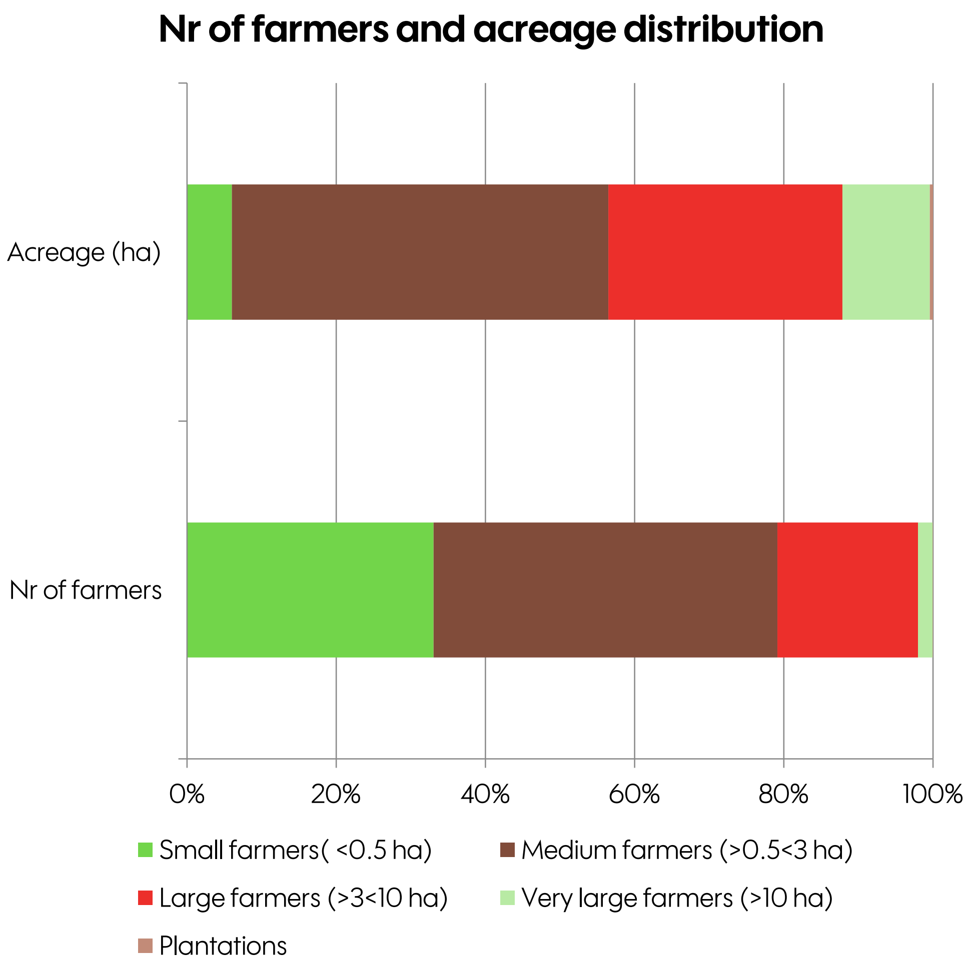
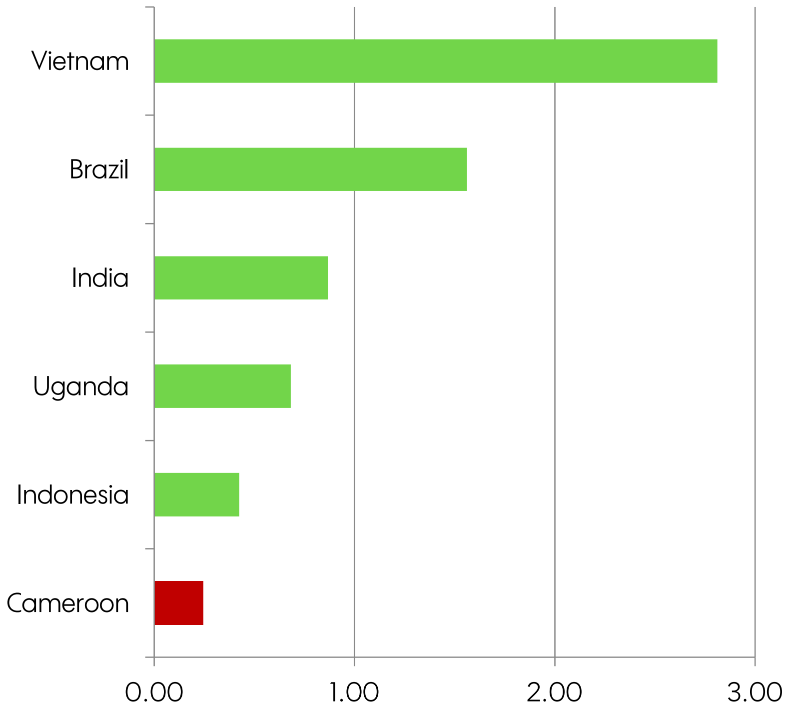



- Average farm size: 1.9 ha.
- Acreage and farmer numbers are unreliable and large differences exist between different sources.
- Our assumption: 73,000 farmers and 110,000 ha.
- Regionally, land shortages exist, mostly in the arabica areas.
- Robusta areas are less densely populated than the arabica areas. There could be scope to expand acreage under coffee in some areas but it is unclear by how much.
- 45% of acreage from mid-sized farms.

Sources: NCCB, PSD, FAO, interviews, AL and VC analysis

# CURRENT PRODUCTIVITY AMONG THE LOWEST OBSERVED

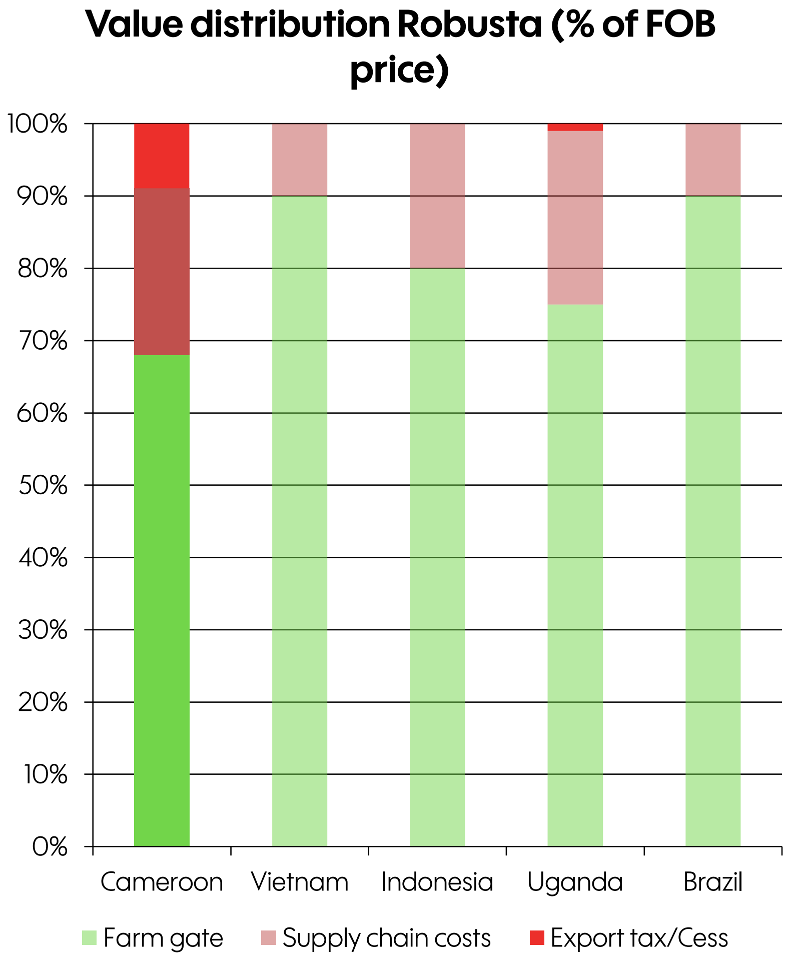
**Robusta productivity (Mt/ha), selected origins**




- Combined productivity of arabica and robusta is around 250 kg green coffee per ha.
- Productivity in Vietnam is more than a factor 10 higher.
- Investments that are a function of the number of farmers in a supply chain and generate a return on coffee volume (e.g. sustainability certification) are therefore hard to implement in Cameroon.
- Causes of low productivity: ageing plantations, under-funded research, lack of inputs and limited application of Good Agricultural Practices.
- Productivity in Uganda, that faces similar challenges, is more than double that of Cameroon, indicating great potential for improvement.

Sources: USDA, FAO, interviews, AL and VC analysis

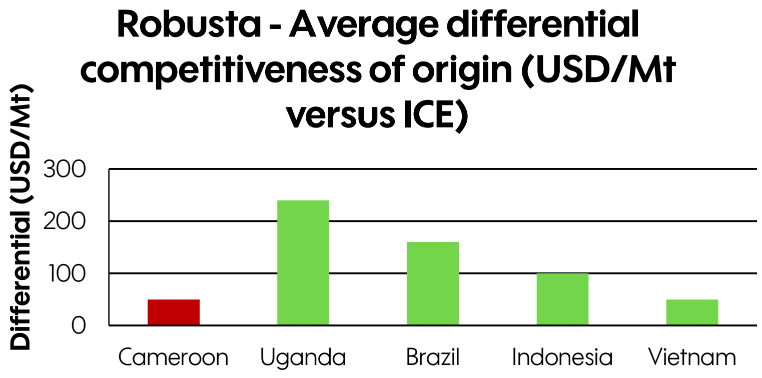
# HIGH TAXES AFFECT FARM GATE PRICE AS SHARE OF FOB VALUE

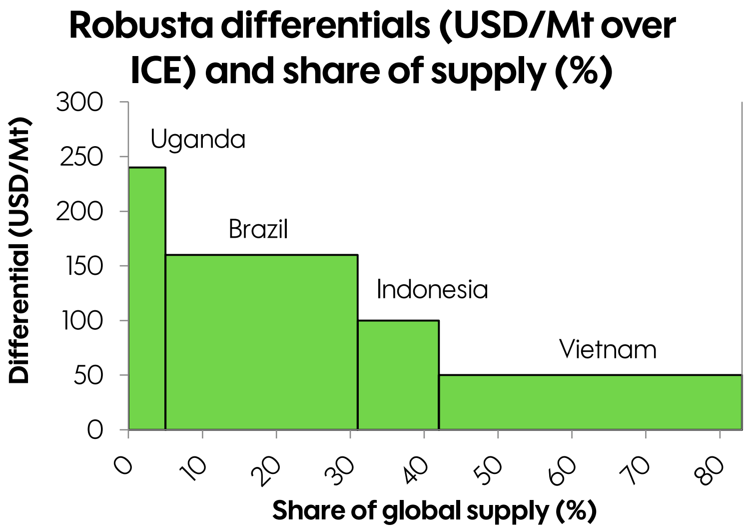



- Cameroon exports are highly taxed compared to other origins. Export tax was raised from 8.8 USDct to 17 USDct/kg.
- At current coffee prices this amounts to 9% of FOB value.
- Exporters cannot pass on the tax hike to clients, farm gate prices have reportedly suffered as a result.
- On average farmers receive 68% of the FOB value.
- A small number of companies reportedly evade the export taxes, resulting in unfair competition during procurement *and* sales, both in the domestic market and at export.
- There is a significant efficiency gap with market leader Vietnam, but also with origins like Uganda.

Sources: Interviews, TNS, AL and VC analysis

# DIFFERENTIAL DOWN SIGNIFICANTLY, LOW VOLUME IMPEDES COMPETITIVENESS




- Given low production costs, Cameroon *can* be competitive on price.
- Current differential (grade 2 robusta) is around 50 USD/Mt over ICE.
- The differential used to be in the 100-150 USD/Mt range, but has declined due to quality concerns and fluctuating supply availability.
- Cameroon market share has declined to less than 1%.
- Differentials could firm up if supply and quality issues are addressed.

Sources: NCCB, interviews, USDA, AL and VC analysis

# HOWEVER, COST OF PRODUCTION IS LOW, WHILE COSTS IN VIETNAM INCREASE

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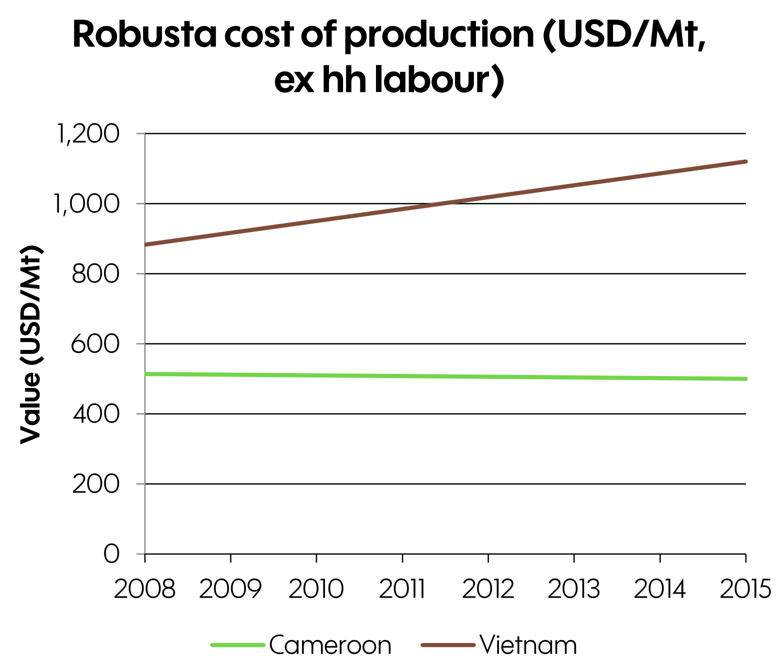
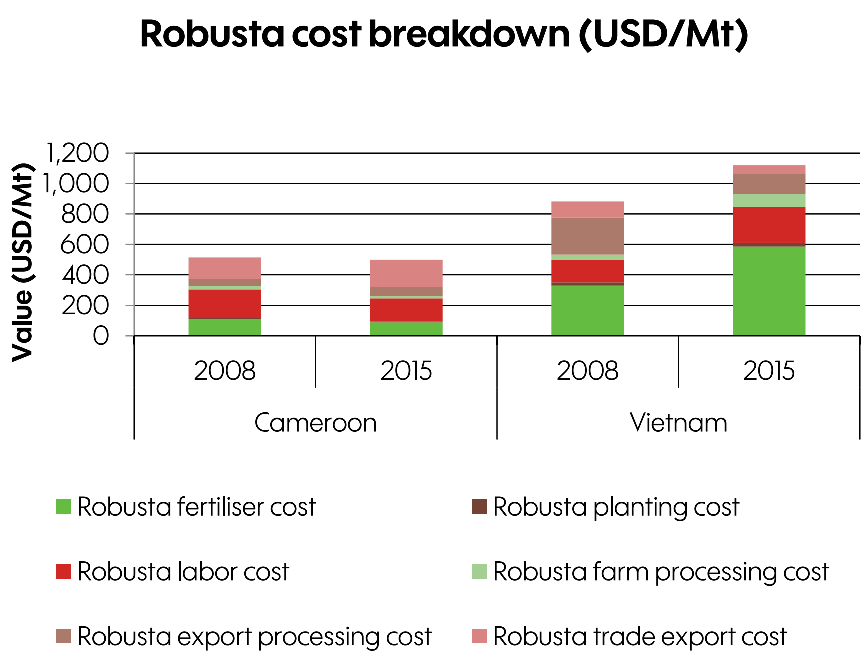
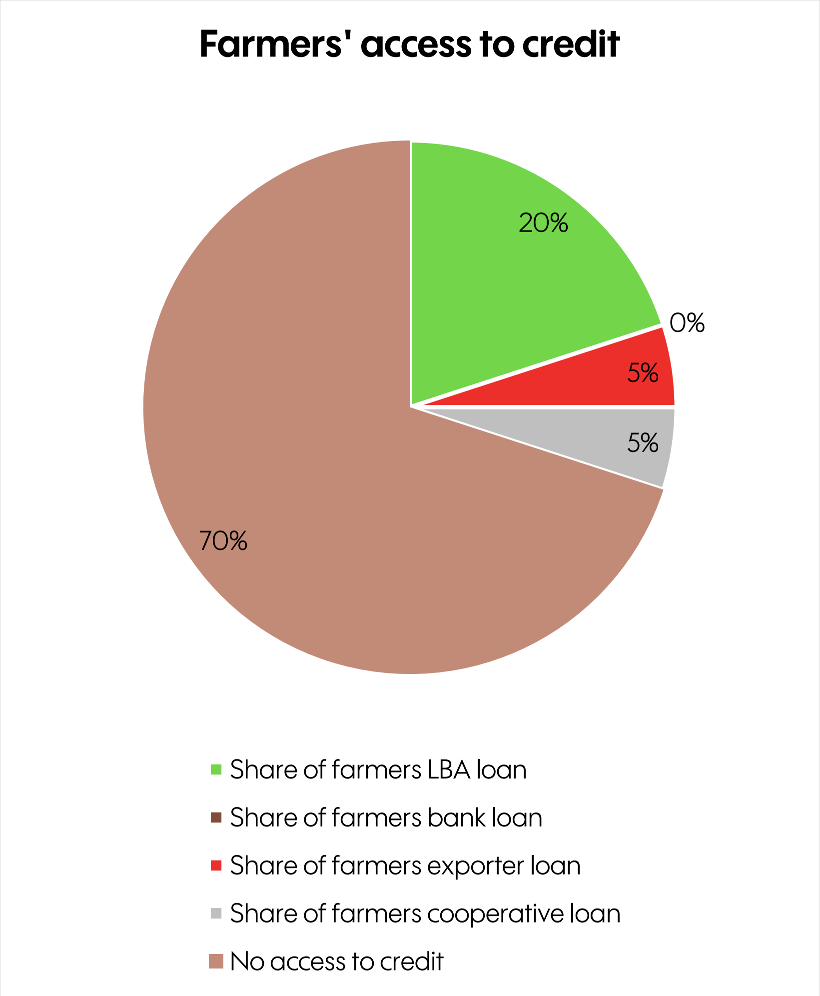



- Increasing cost in Vietnam, especially labour and fertiliser, can prove to be an opportunity for Cameroon and other robusta origins in Africa. Efficiency gains in export cost could further enhance competitiveness.
- Historically, low-cost producers have gained dominance (e.g. Brazil and Vietnam).

Sources: Interviews, JDE, 4C, TNS, AL and VC analysis

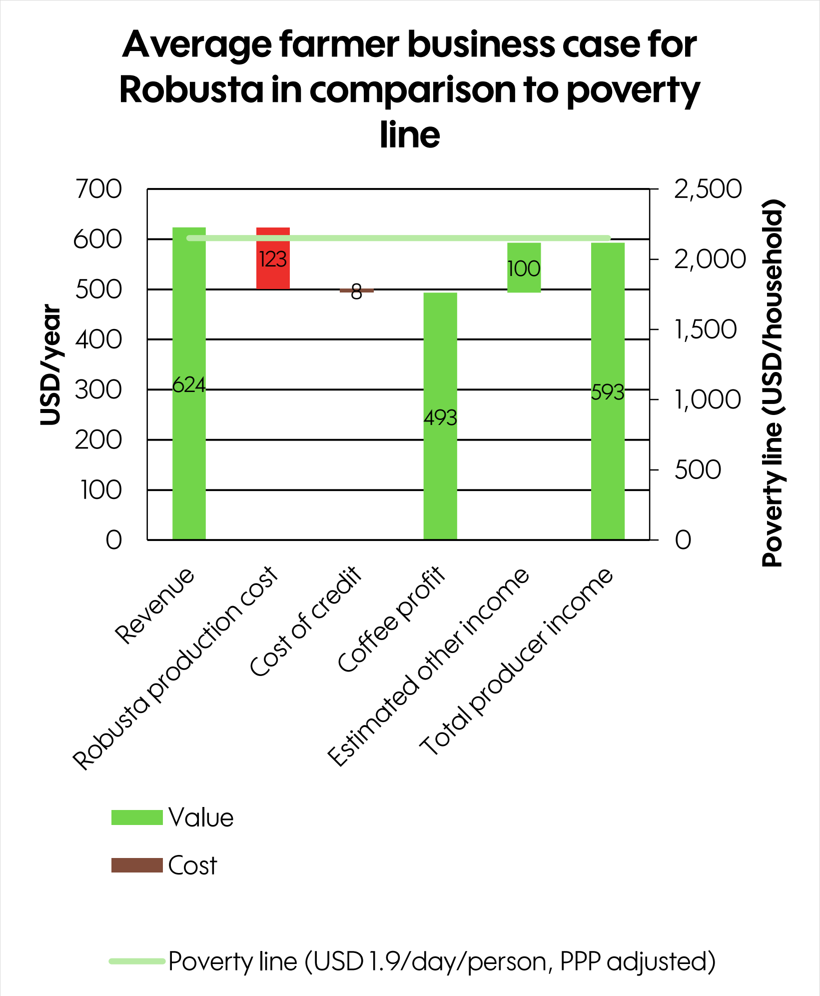
# FARMERS' ACCESS TO CREDIT IS VERY LIMITED AND PREVENTS INVESTMENTS




- An estimated 30% of farmers has access to credit.
- Credit provided is only short term for a coffee season of maximum 9 months.
- LBA interest rates are around 3% per month on average, which equals 36% annually or 27% per coffee season.
- LBAs have an estimated 90% share of the farmer credit market (which constitutes an estimated 30% of the farmer population).
- Given the high cost of credit, much of its use is for emergency purposes, not investment.
- Loans from exporters and cooperatives are far cheaper but their risk appetite is currently too low to reach significant numbers of farmers.

Sources: Interviews, USDA, AL and VC analysis

# PURE-PLAY COFFEE FARMERS REMAIN AND RELY HEAVILY ON COFFEE

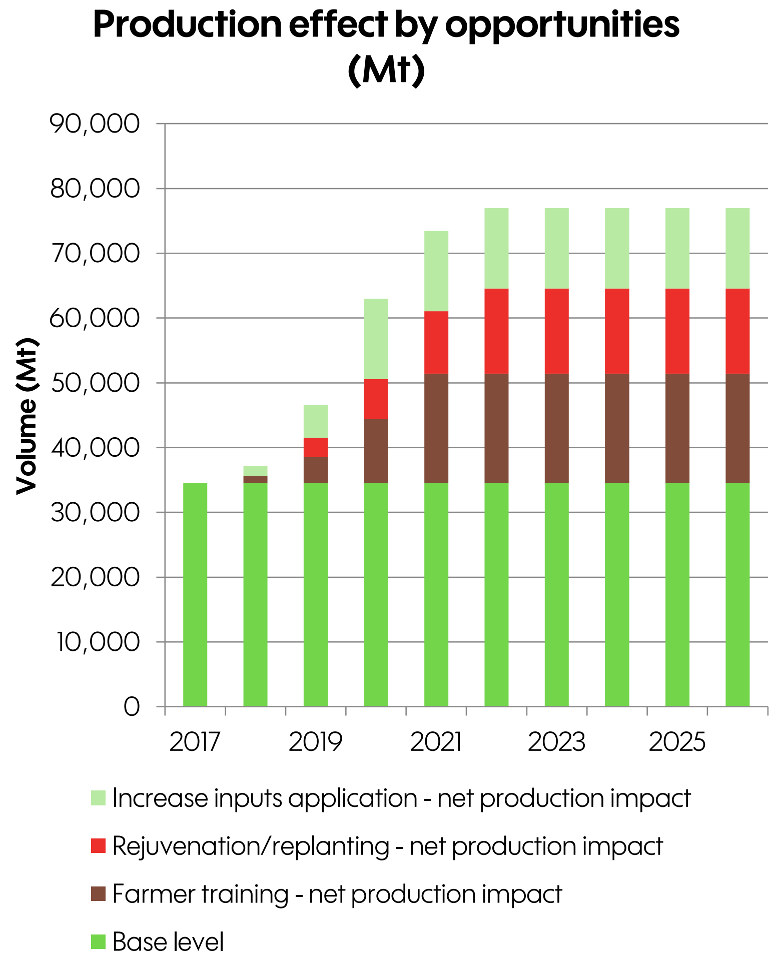



- Most farmers with alternatives appear to have moved out of coffee into other crops such as vegetables, cocoa and palm oil.
- For those that remain coffee is the primary source of income.
- Still, at current productivity levels other opportunities may be more attractive (palm, vegetables, cocoa).
- It is recommended to target investment in areas where few alternative cash crops are available.
- With an average family-size of 6.2 people per household, net coffee income is 3.6 times less than the poverty line of 1.9 USD/capita/day.

Sources: Interviews, USDA, AL and VC analysis

# MODELLING INVESTMENT OPPORTUNITIES – PRODUCTION EFFECTS

- Modelling 5 opportunities:
  - Farmer training
  - Rejuvenation
  - Increasing input application
  - Improvement of processing capacity
  - Certification
- A combination of the first 3 interventions could increase average production per farmer (and per ha) 1.8 fold.
- This would bring national production to ~78,000 Mt by 2022.



# MODELLING INVESTMENT OPPORTUNITIES – PRICE EFFECTS

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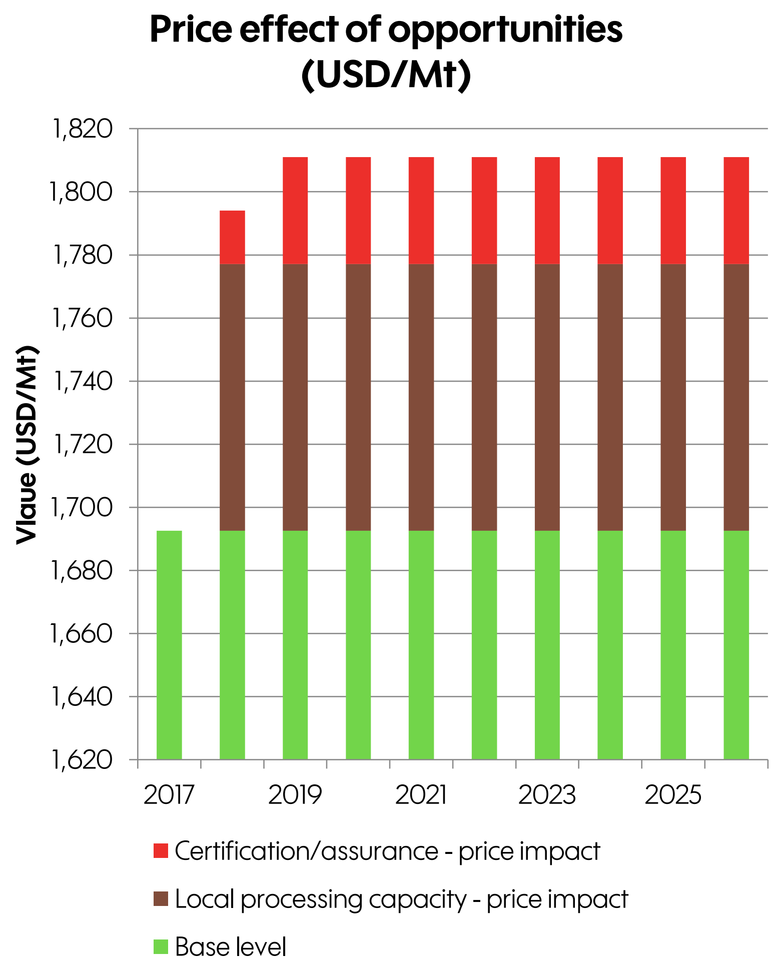
- Assuming a weighed average base price stable over time.
- Taking markets and willingness to pay for better quality into account: ~19% of volume could benefit from quality improvement.
- This could bring differential back up from 50 USD/Mt to 135 USD/Mt for targeted volume or to 77 USD/Mt on average across total supply.
- Standards could add a small price improvement on 20% of the annual volume by 2022, but Net Present Value of this investment is negative, even if assuming a 30 USD/Mt premium which to date is not being paid for certified robusta from Cameroon.
- Detailed models for the first 5 opportunities are shown on the following pages. Four of these are positive, one is not.



# FARMER TRAINING INVESTMENT CAN GROW CURRENT SUPPLY BY 50%

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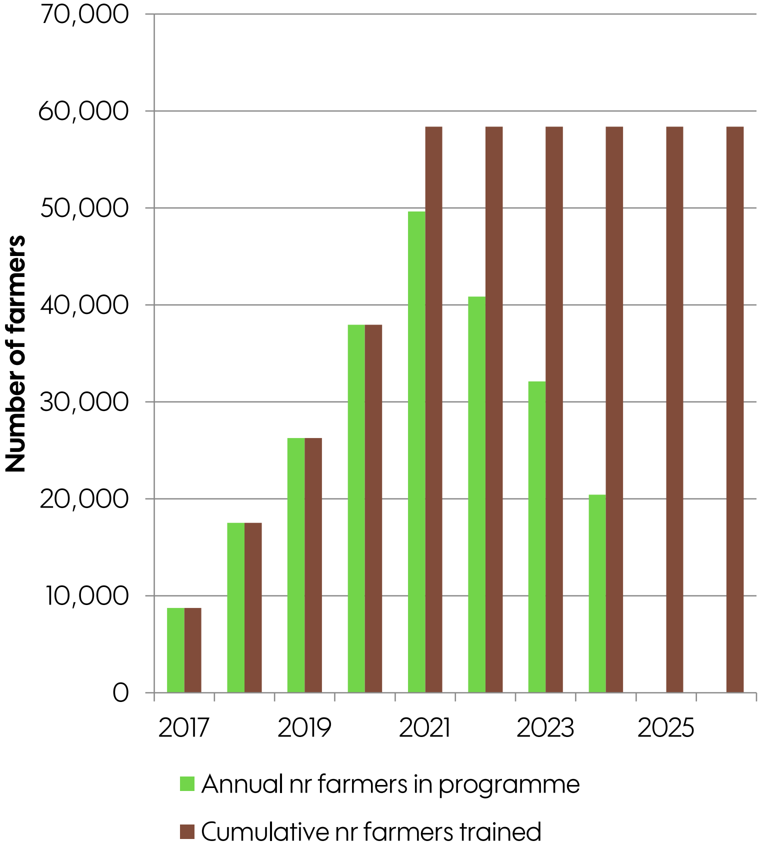
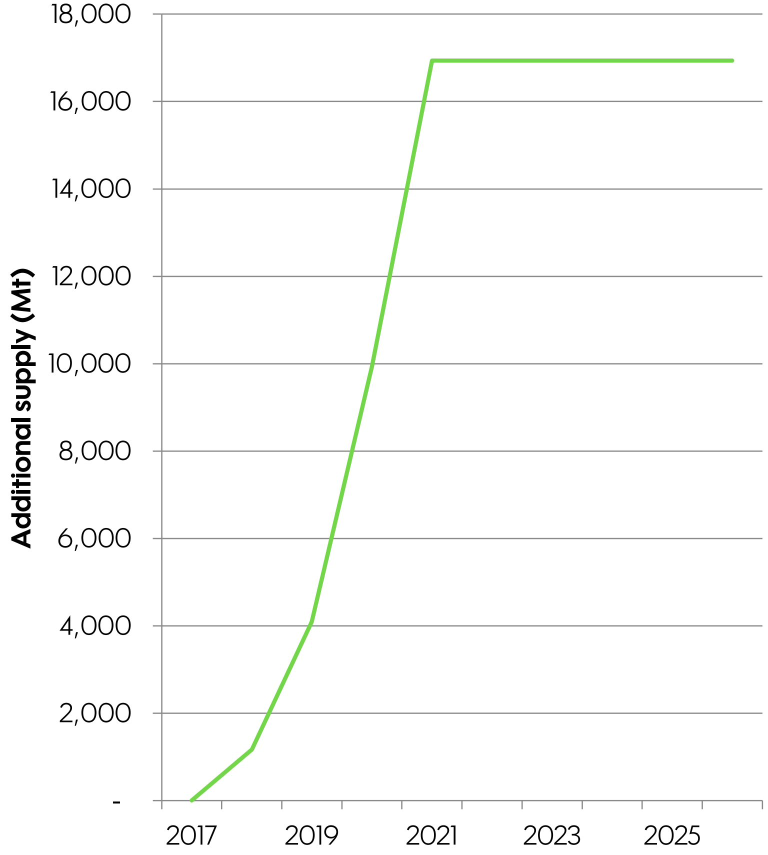
### Number of farmers enrolled in training program




### Additional supply from farmer training programme



# FARMER TRAINING OFFERS POTENTIALLY EXCELLENT RETURNS ON INVESTMENT

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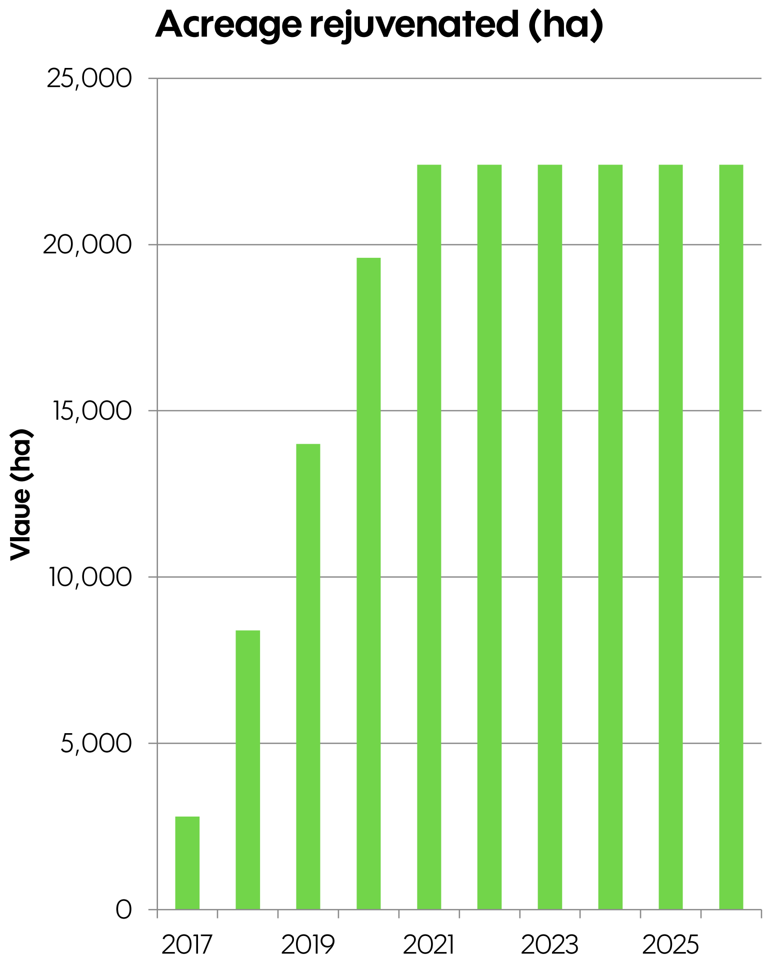
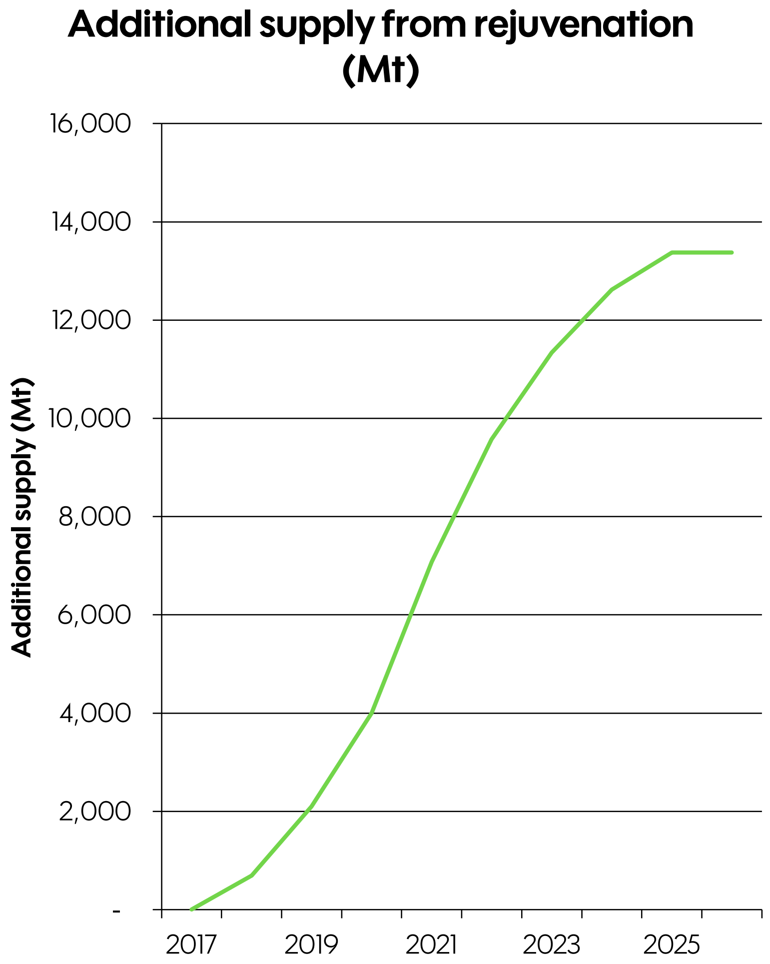
- For training to be effective it needs to be participatory, intensive and should run for at least 4 years.
- Against this background we generously budget 120 USD/farmer/year in training costs, totalling 28 million USD over 10 years.
- Integral in that cost is the investment to build up a pool of trainers and agronomists to conduct training sessions.
- We assume that 80% of the coffee farmers are sufficiently motivated and dedicated to participate.
- Current government extension services appear to be dysfunctional and the reach of cooperatives is limited. The training programme is therefore ideally implemented by the private sector, some of whom have a good track record in this.
- Through more and better application of GAP supply can grow by 50%.

| Indicator | Value (10 years) |
|---|---|
| Cumulative nr of farmers reached | 58,400 |
| Additional volume coffee per annum in steady state (Mt) | 16,936 |
| Total investment | $ 28,032,000 |
| Total return | $ 197,688,039 |
| NPV (10%) | $ 85,814,605 |
| NPV (20%) | $ 47,410,549 |
| Investment per farmer | $480 |

# REJUVENATION INVESTMENT TAKES A WHILE TO SHOW EFFECTS…



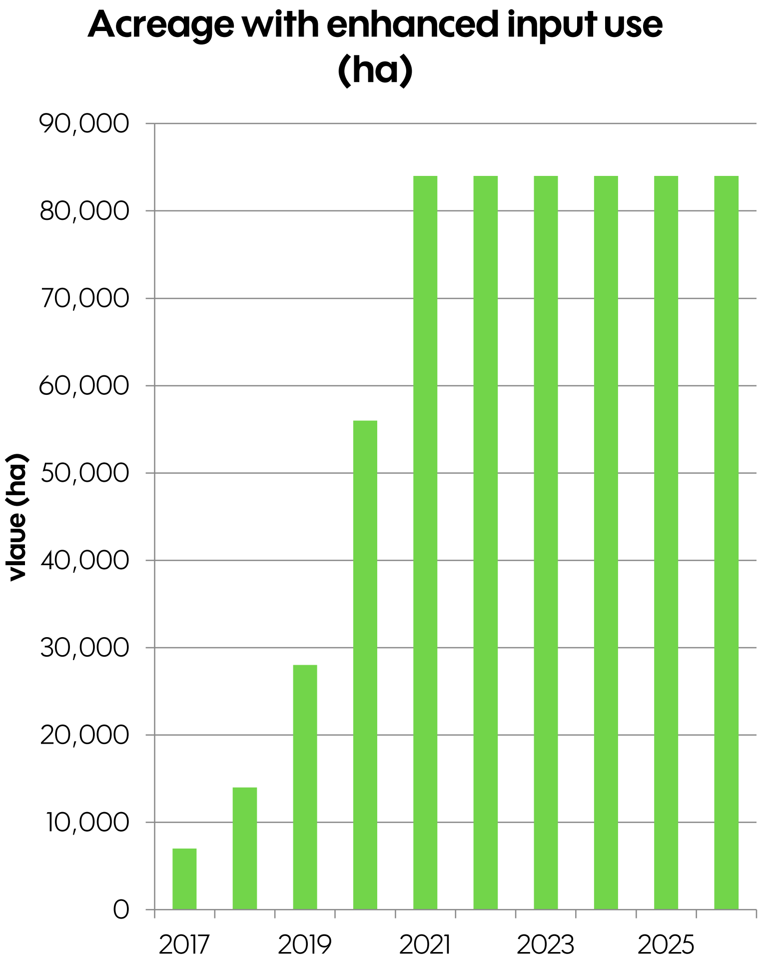



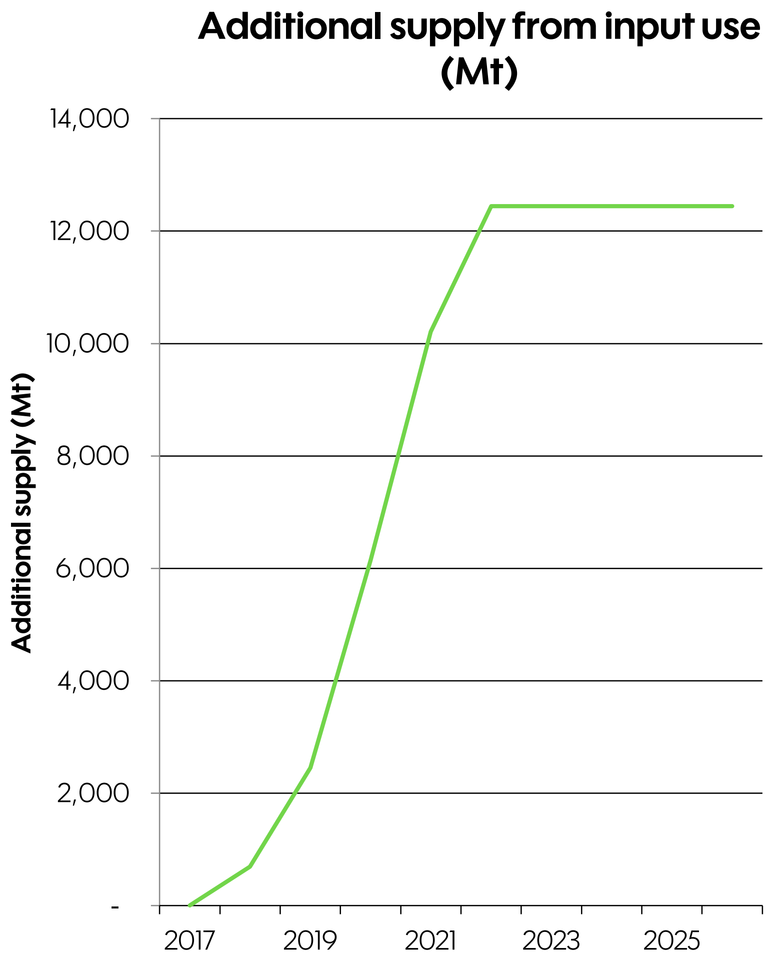
# ...BUT RETURN ON INVESTMENT IS POSITIVE

- Government sponsored nurseries are available but do not have enough capacity.
- Experience in Cameroon arabica by the private sector shows that commercially run nurseries run by entrepreneurial farmers can make a difference.
- No major pests and diseases are currently present in Cameroon robusta, but given prevalence of coffee wilt disease (CWD) on the continent it makes sense to select CWD resistant varieties, drought tolerance should also be factored in.
- We assume that a 30% replanting rate is required resulting in 22,400 ha replanted.
- As labour is relatively cheap, investment in replanting amounts to 450 USD/ha all-in.
- Once concluded the replanting programme can contribute around 12,000 Mt of additional supply.

| Indicator | Value (10 years) |
|---|---|
| Cumulative acreage replanted | 22,400 |
| Additional volume coffee per annum in steady state (Mt) | 13,140 |
| Total investment | $ 10,080,000 |
| Total return | $ 142,829,608 |
| NPV (10%) | $ 66,323,712 |
| NPV (20%) | $ 36,110,086 |
| Investment per ha | $ 450 |

# INPUT SUPPLY INVESTMENT CAN HAVE A WIDE REACH



# INPUT USE STILL LOW, BUT COULD GROW AS FARMER EQUITY INCREASES

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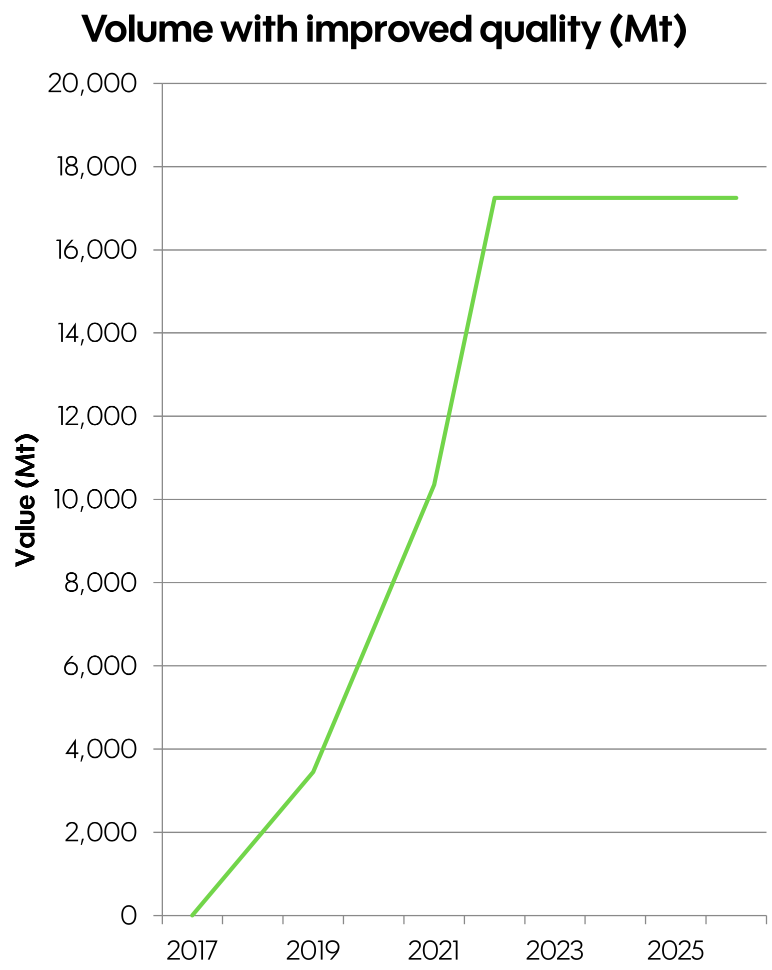
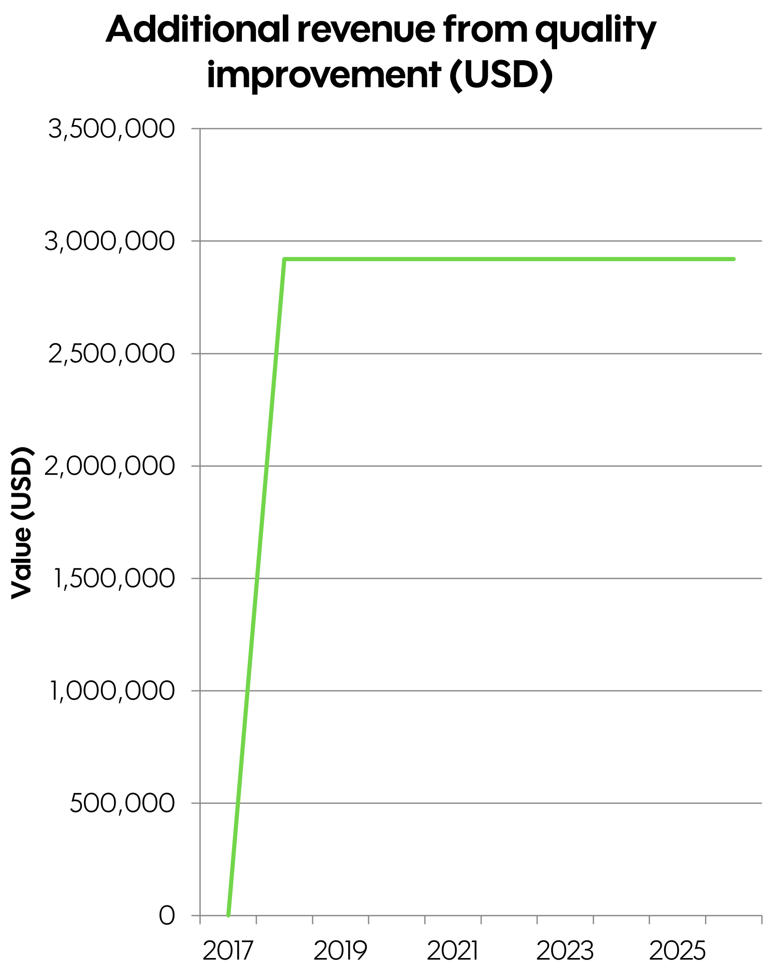
- Small-scale farmers tend to be risk averse as one failed crop is enough to undermine their living conditions.
- Fertiliser investment is risky, but farmers would have to finance 20%-30% from equity.
- Limited extra use of inputs can be promoted to match risk appetite of farmers and generate additional production.
- With 100 USD/ha/year additional investment per ha on 70% of the national acreage, an additional 12,410 Mt coffee can be produced.
- Only farmers that are part of the training programme should make use of the additional input supply investment to ensure optimal use.
- Experience from other coffee projects in Cameroon shows that 20-30% of fertiliser made available for coffee will be used on food crops.

| Indicator | Value (10 years) |
|---|---|
| Cumulative acreage using inputs | 84,000 |
| Additional volume coffee per annum in steady state (Mt) | 12,410 |
| Total investment | $ 60,900,000 |
| Total return | $ 158,150,431 |
| NPV (10%) | $ 52,658,747 |
| NPV (20%) | $ 31,188,112 |
| Investment per ha per year | $ 100 |

# QUALITY IMPROVEMENT INVESTMENT FOR PART OF SUPPLY



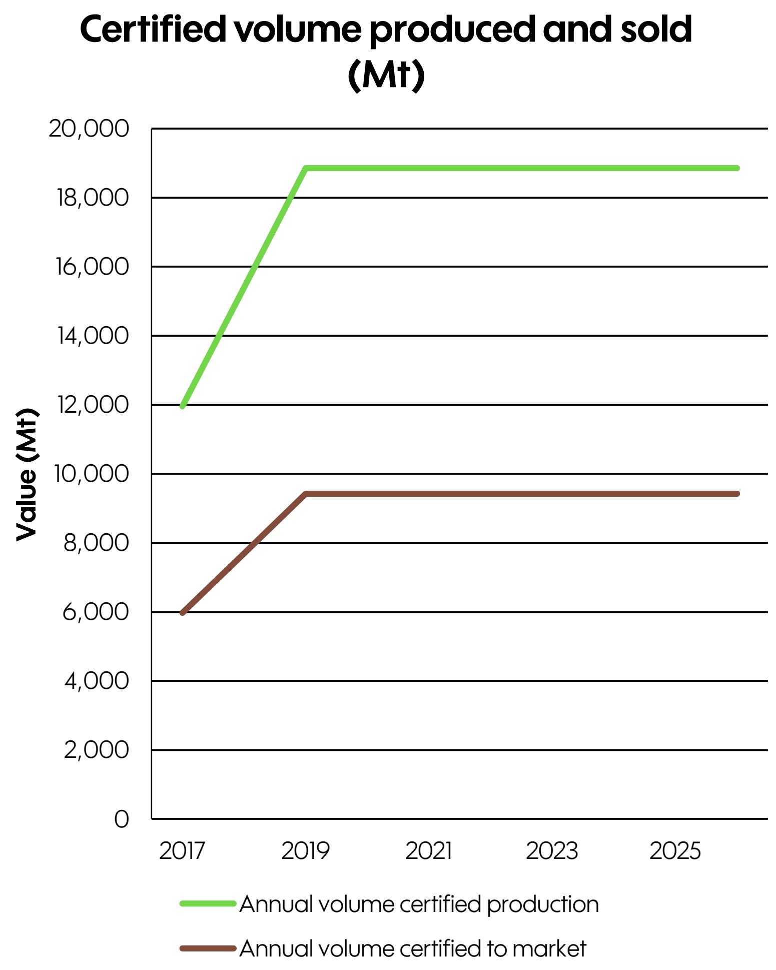
# QUALITY IMPROVEMENT INVESTMENT

- The National Coffee and Cocoa Board (NCCB) has the mandate to conduct field-level quality checks and shut down dry mills that do not comply with its standards.
- Despite this, storage of wet coffee continues, often during the season's peak. Bare soil drying at farm level is also prevalent.
- Actions of NCCB could be paired with concerted private sector changes in buying practices.
- Differential improvements and black-listing of non-compliant mills can provide incentives to enhance quality.
- Relatively low investment is required at mill level.
- Return on investment in terms of better differentials is positive; previously difficult to penetrate markets may once more become available.

| Indicator | Value (10 years) |
|---|---|
| Volume of improved quality per annum in steady state (Mt) | 17,250 |
| Additional value of improved quality per annum in steady state | $ 2,919,622 |
| Total investment | $ 1,086,750 |
| Total return | $ 26,276,599 |
| NPV (10%) | $ 14,728,015 |
| NPV (20%) | $ 9,493,281 |
| Investment per Mt | $ 10 |

# CERTIFIED VOLUMES CAN BE INCREASED THROUGH ADDITIONAL INVESTMENT

- Cameroon has a relatively high share of certified coffee that reaches the market as certified.
- Investment per farmer for complete implementation of certification and all associated costs amounts to around 30 USD/farmer.
- This is a relatively high investment as sector organisation is fairly weak, Personal Protective Equipment is completely absent on most farms and few if any cost-effective service suppliers are active in the sector.
- Currently no premiums are paid for certified coffee from Cameroon.



# RETURN IS NEGATIVE BUT CERTIFICATION MAY OPEN NEW MARKETS OR MAINTAIN EXISTING ONES

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- Relatively high cost per farmer for certification and low production volumes result in high assurance cost in relation to production volume.
- Even if a premium payment would materialise, we are assuming 30 USD/Mt in our model, the return on investment is negative at expected cost levels.
- The business case for certification alone is not positive, although it generally leads to investments in training, and may also open up specific markets that demand compliance.

| Indicator | Value (10 years) |
|---|---|
| Volume of certified coffee produced per annum in steady state (Mt) | 18,851 |
| Volume of certified coffee marketed per annum in steady state (Mt) | 9,426 |
| Additional value of certification premiums per annum in steady state | $ 234,439 |
| Total investment | $ 8,611,200 |
| Total return | $ 2,051,557 |
| NPV (10%) | $ -3,936,593 |
| NPV (20%) | $ -2,621,621 |

# SIGNIFICANT POSITIVE IMPACT ON FARMERS, BUT OTHER INCOME NEEDED

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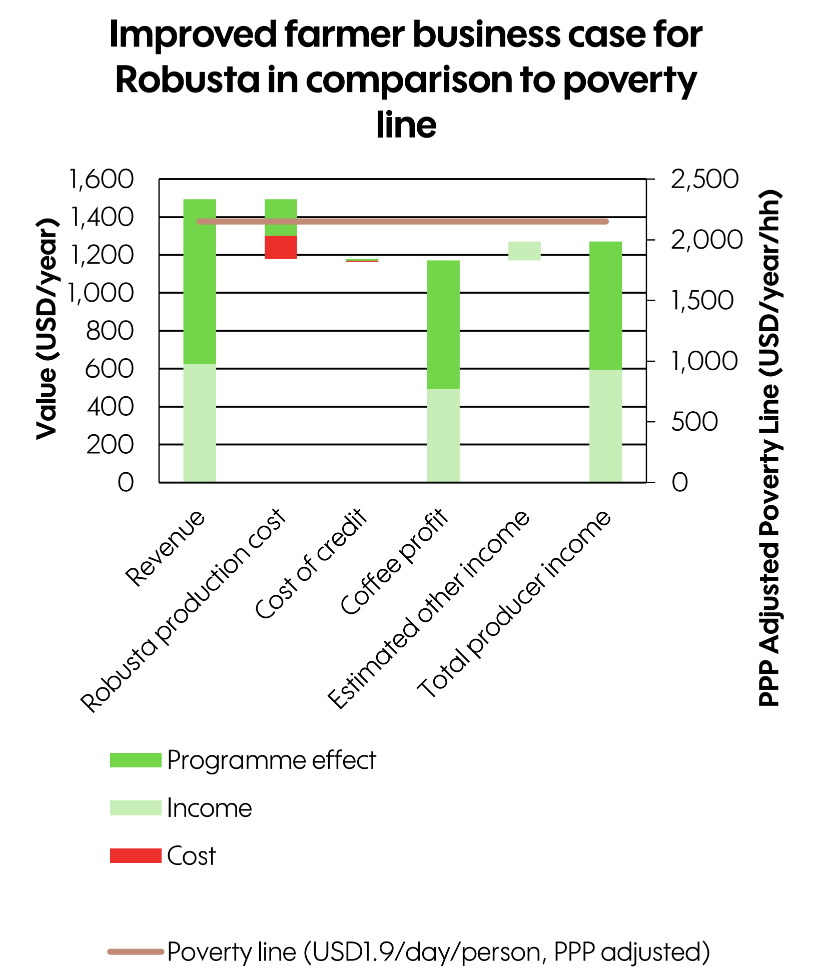
- The 4 investment opportunities that show a positive return can have a significant impact on farmer livelihoods, improving annual coffee profit by 145% to 1,243 USD/farm.
- Interviewees esitmate that farmers rely for 70-80% on coffee for their income.
- This however is still not sufficient for a full farming family in relation to the poverty line (value of home consumption of other crops not factored in).
- To lift farmers out of poverty, further income is needed. This could be achieved by scaling up coffee production to new land by a factor of 1.7, or introducing income diversification on the farm or for other household members.
- Despite significant improvements in income, it appears unlikely that farmers will exceed the poverty line of 1.9 USD/day/capita.

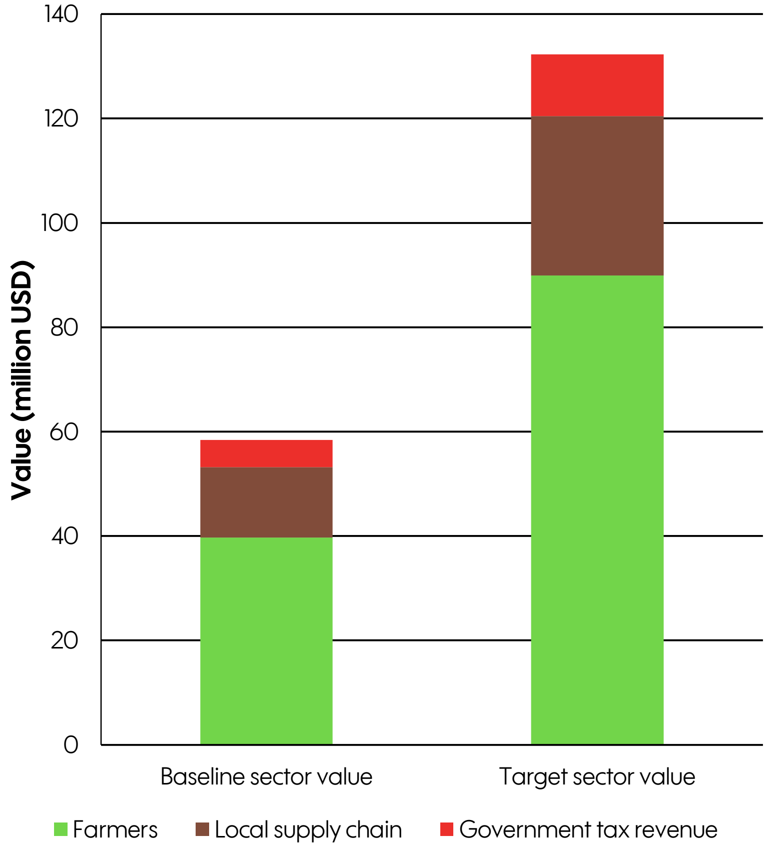


# NATIONAL BUSINESS CASE: SIGNIFICANT INCREASE IN SECTOR VALUE FOR ALL

| Summary | USD over 10 years |
| --- | --- |
| Total investment | $ 95,788,950 |
| Total return | $ 587,341,827 |
| NPV (10%) | $ 252,281,862 |
| NPV (20%) | $ 143,560,500 |

- Investment in coffee can significantly increase the sector value for all actors in the value chain. Majority of value flows into the rural economy.
- Growing value beyond the farm gate could attract more international exporters to the sector.
- Export tax could be reduced gradually to improve competitiveness and/or transfer more value to farmers.

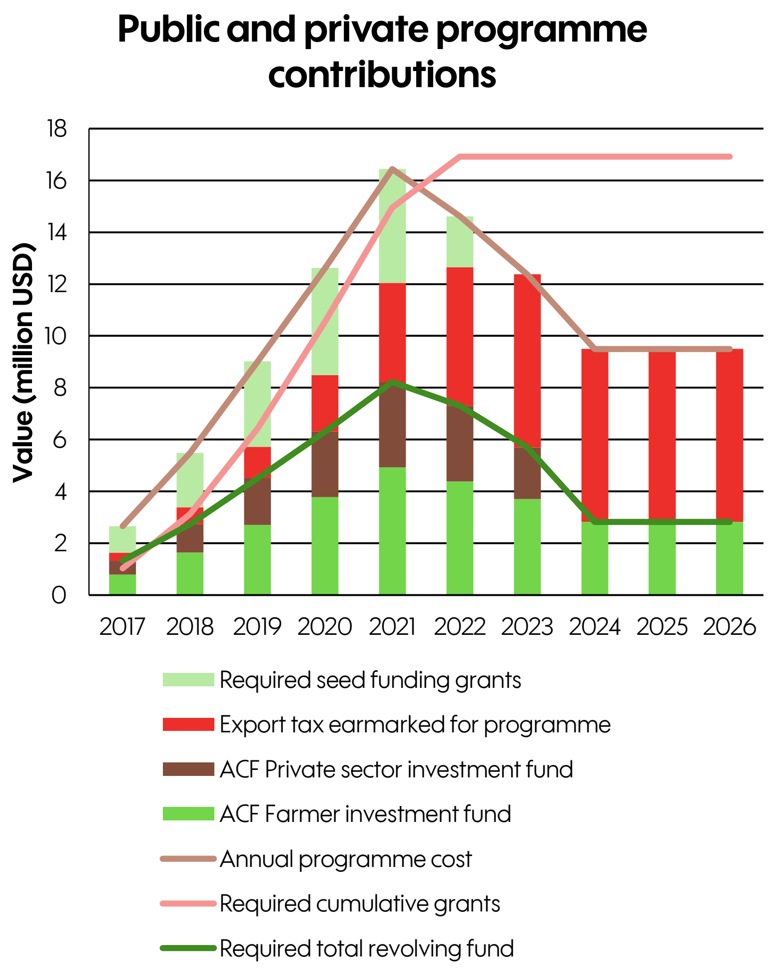
**Impact of investment on national sector value in steady state (M$)**



# INVESTMENT SHARED BY NATIONAL GOVERNMENT, PRIVATE SECTOR, GRANTS

- Assuming 5% of the export tax invested, increasing to 50% as tax revenue grows.
- Private sector investment by farmers (mainly inputs) and buyers/traders (training, processing), financed from ACF revolving fund and/or commercial funds. Few private exporters invest in Cameroon. ACF conditions need to be competitive compared to current financing.
- Grants are needed as initial seed funding to fill the funding gap.
- Leverage industry and government investment to attract roasters, donors and banks.

| Summary | |
|---|---|
| ACF revolving fund size | $8,217,960 |
| Required grant funding | $16,921,394 |
| Required grant funding % | 17% |
| Required national budget (% export tax) | 50% |




*Contributions are indicative based on stakeholder input. Investments and conditions to be negotiated within national public private platforms taking into account amongst others international competitiveness, governance, transparency and accountability assurance.*

# CONCLUSIONS

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- The coffee sector currently contributes only a small part of GDP in Cameroon. The sector is not competitive, performing below benchmarks within and outside of Africa. There appears to be little international private sector interest to invest, but some local exporters are keen.
- There exists significant potential to increase coffee sector value in Cameroon through selective investment in farmer training, farm rejuvenation, use of inputs and in-country processing. These investments yield positive return on investment on all levels of the value chain. Productivity can increase by a factor 1.8. Increased value largely flows into rural economy.
- Coffee will not provide sufficient income for a full farmer household, but an increase in farm size and/or diversification of income can be pursued to address the income gap and take farmers out of poverty. Still, it is unlikely that farmers will be lifted out of poverty in the short- to mid-term. For farmers to reach the poverty line their acreage or productivity would have to increase by a factor 1.7 in addition to the projected programme effects.
- Total programme investment amounts to an estimated 100 million USD over 10 years that would generate a return across the sector of >509 million USD at current prices

## Sources
Global Coffee Platform, National Coffee and Cocoa Board, Olam, Café Africa, Authority, Jacobs Douwe Egberts, Lavazza

## Data
US Department of Agriculture, Food and Agriculture Organisation, International Coffee Organisation, Uganda Coffee Development Authority, 4C Association, UTZ Certified, Agri-Logic

## About the Global Coffee Platform
The GCP is a collaboration between the 4C Association and the Sustainable Coffee Program of IDH – The Sustainable Trade Initiative. The Global Coffee Platform is an inclusive multi-stakeholder sustainability platform aligning the activities of a diverse network of stakeholders to set into action the global commitments made through Vision 2020 and create a thriving and sustainable coffee sector.

## About Agri-Logic
Agri-Logic – management, consultancy and research - operates where agricultural production, development, international trade and consumer markets intersect. We combine a thorough understanding of farm level reality and commodity trade with scientific research skills and a track record in sustainability strategy design and implementation, to help clients deal with sustainability challenges and market requirements.

## About Valued Chain
Valued Chain is an independent consultancy. We support organizations in understanding their value chain and stakeholders, identification and mitigation of risks, and realization of opportunities. We believe in integrating commercial objectives with sustainability of the business and its stakeholders. Working from Amsterdam and Lagos, we connect Europe and Africa.

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