AFRICAN COFFEE SECTOR

addressing national investment agendas on a continental scale

Ethiopia Case Study

Sector study conducted by Agri-Logic and Valued Chain by assignment of the Global Coffee Platform

Contact: info@agri-logic.nl

INTRODUCING NATIONAL COFFEE INVESTMENT AGENDAS FOR AFRICA

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

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

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

INVESTMENT OPPORTUNITIES ANALYSIS

- 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 ETHIOPIAN COFFEE SECTOR – EXECUTIVE SUMMARY

- Ethiopia is recognized as the birthplace of coffee, and represents **4.3% of global coffee production**. **Arabica quality is valued and production costs are competitive**.

- The production is largely characterised by **small farms of on average 0.67 ha**, and many below 0.5 ha. With low to moderate yields, incomes are low for an estimated 1.2 million coffee farmers. **The small farm sizes make it nearly impossible for a coffee farming family to surpass the international poverty line from coffee alone**. Farmers have significant other income sources in addition to coffee.

- About half of exports are to **markets with high and medium interest in sustainability**. Coffee sold through the Ethiopia Commodity Exchange (ECX) is **currently not traceable** to the farmer and as such does not comply with certification requirements. ECX has piloted bag tagging, and conclusions are pending.

- Even though an increase in farm gate prices as share of the FOB price has been reported in recent years, **farmers currently receive an approximate 61% of FOB price, indicating supply chain inefficiencies**.

INVESTMENT AGENDA FOR ETHIOPIAN COFFEE SECTOR – EXECUTIVE SUMMARY

- There is significant potential to increase the coffee sector value in Ethiopia through selective investment in farmer training, farm rejuvenation, use of inputs, certification and farmer group development. **Over a period of 10 years a cumulative investment of ~564 million USD can lift farmers above the poverty line and double the coffee GDP** for the country.

- Several actors show a willingness to invest, with **high private sector sustainability interest** in Europe and North America, **Ethiopian government investments**, and much **interest from the donor community**.

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

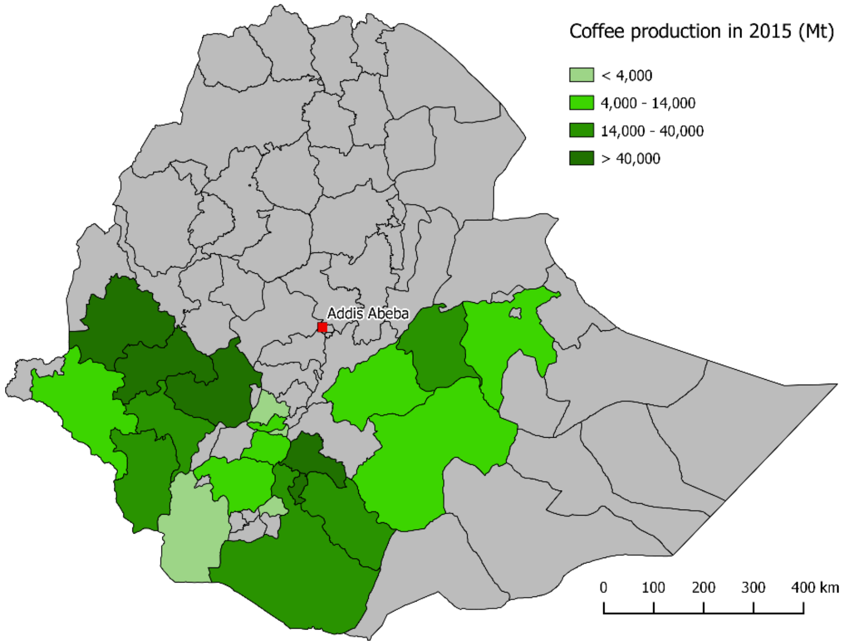
ETHIOPIA

Focus on yields, resilience and supply chain efficiency

POSITIONING OF ETHIOPIA

Item	Value
Total volume (3 year average)	386,400 Mt
% of global production	4.33%
% Arabica – Robusta	100% Arabica
% natural – washed	70% - 30%
Compound Annual Growth Rate of coffee production (2000-2015)	3.9%
Main export markets	Germany, Saudi Arabia, United States, Japan
Market segments	Arabica coffee valued for its quality
GDP	145.4 billion USD
GDP – agriculture	21.4 billion USD
GDP – coffee (based on current prices)	1.1 billion USD

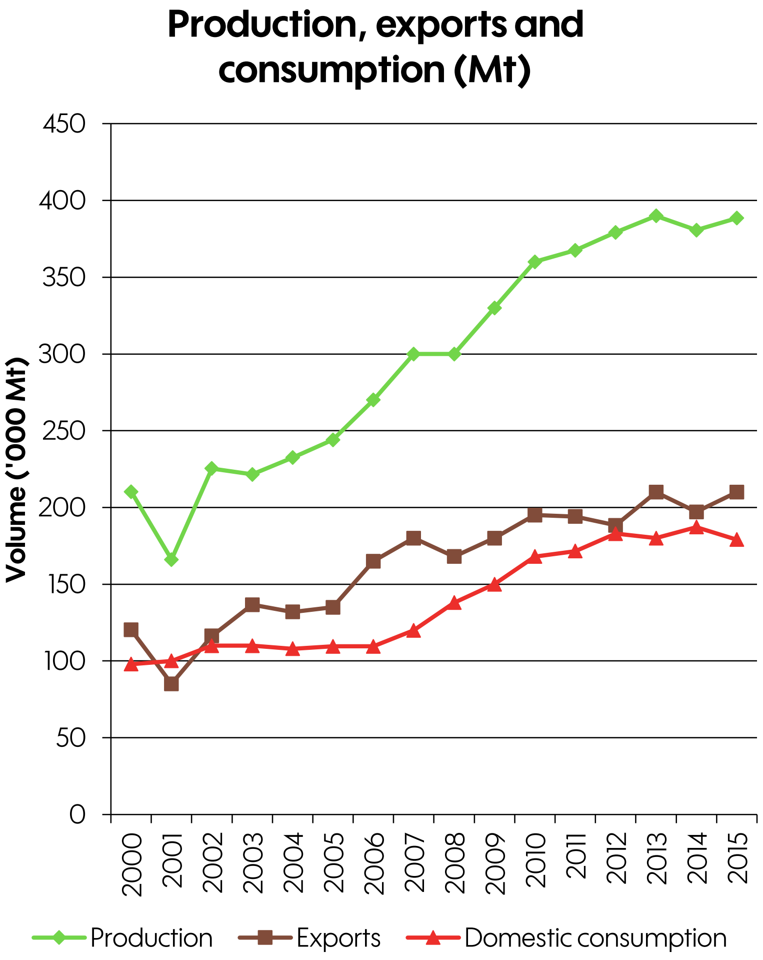
ETHIOPIA COFFEE PRODUCTION AREAS BY ZONE, TYPE AND SUPPLY LEVELS



- All coffee is Arabica, but different zones each bring their own distinctive cup profiles.
- About 30% is washed coffee.
- Coffees in Ethiopia are given a geographical designation and a grade. For example, coffee can be designated Jimma (region) A (subregion) grade 4.
- Coffee graded 1 or 2 is considered "specialty." Coffee graded 3 through 9 is graded as "commercial." Grades depend on visual inspection for defects and on cup quality.
- Ethiopia filed trademark registration globally for a number of geographical designations (including Harar, Sidamo and Yirgacheffe), and signed licenses with several large buyers.

Sources: USAID, IFPRI, interviews, TNS, AL and VC analysis

STABILIZING VOLUMES FOR BOTH EXPORT AND DOMESTIC MARKET



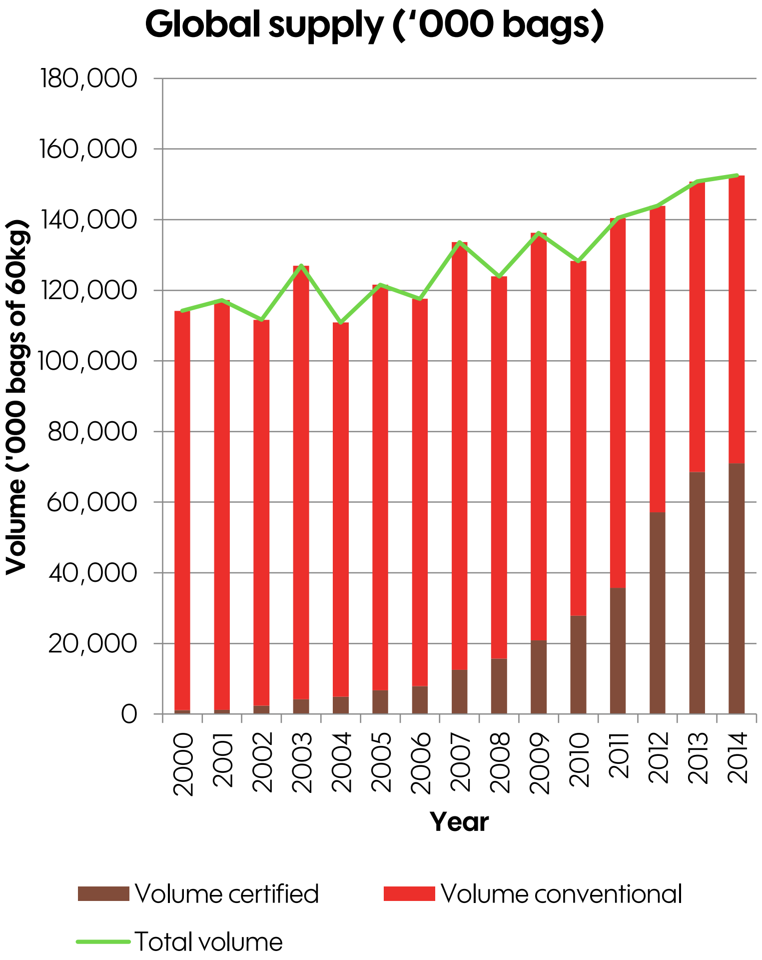
- Ethiopia has seen consistently growing volumes over time. Volume growth is a policy objective for the government, both by increasing yields and preparing new land for coffee. In the federal government Growth and Transformation Plan II (GTP II), coffee production is targeted at 1 million metric tons in 2020. Forecasts by different actors vary.

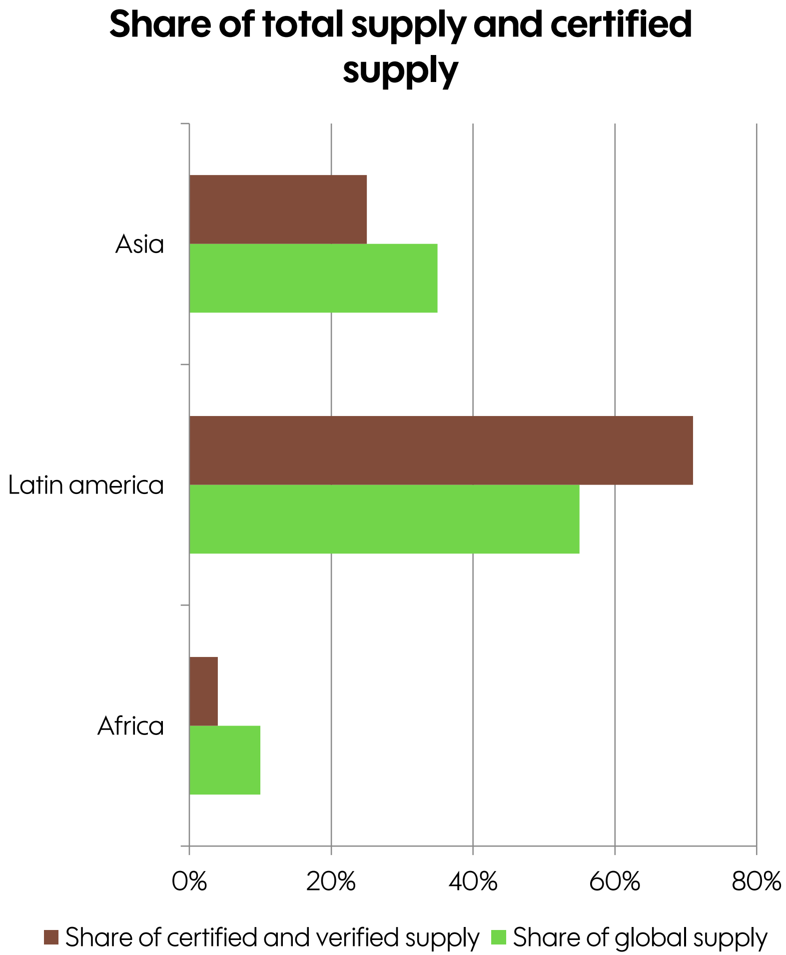
- Even though further volume growth was targeted and expected by many, volumes have stabilized since 2012/13. Where some volume growth has been realized in certain areas, other regions have struggled with weather conditions and pests and diseases.

- Exports are just above domestic consumption. Ethiopian coffee is in constant demand, and a strong local coffee culture contributes to the sector.

Sources: USDA, GTP-II, interviews, AL and VC analysis

AFRICA LAGGING IN SHARE OF CERTIFIED SUSTAINABLE SUPPLY





Sources: USDA, CTA, AL and VC analysis

HIGH DEMAND BUT LOW AVAILABILITY OF CERTIFIED COFFEE

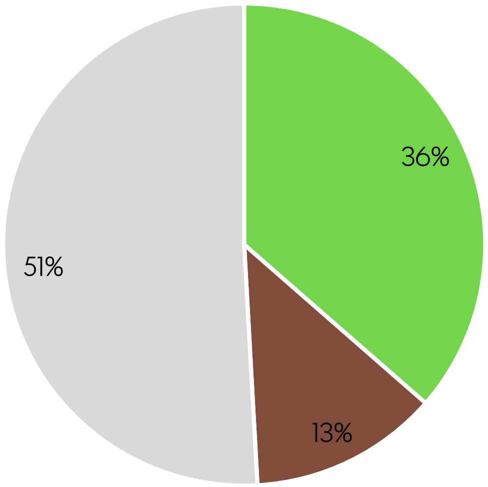
GLOBAL COFFEE PLATFORM
for a sustainable coffee world

- Certified exports are estimated to be below average for Africa and globally.
- There is demand for certified Ethiopian coffee, but traceability and credibility have been a challenge.
- Only cooperatives and estates are allowed to sell traceable coffee without ECX involvement, limiting the use of certification to about 10% of supply. ECX has since last year piloted bag tagging to ensure traceability through the auction, but results have not yet been made available. Industry responses are mixed.
- The only standard that makes available detailed supply and demand data is UTZ. In 2015 26% of UTZ certified supply from Ethiopia was sold as such. If we apply that ratio to total estimated certified supply, that would result in around 2.6% of supply sold as certified.
- Premiums are paid for certified coffee, about one third of the value reaches the farmer, which is a ratio similar to other origins.

Sources: IFPRI, interviews, AL and VC analysis

ABOUT HALF OF EXPORTS TO MARKETS WITH HIGH AND MEDIUM SUSTAINABILITY INTEREST

Ethiopia exports (% of total) and market interest to invest in sustainability in destinations

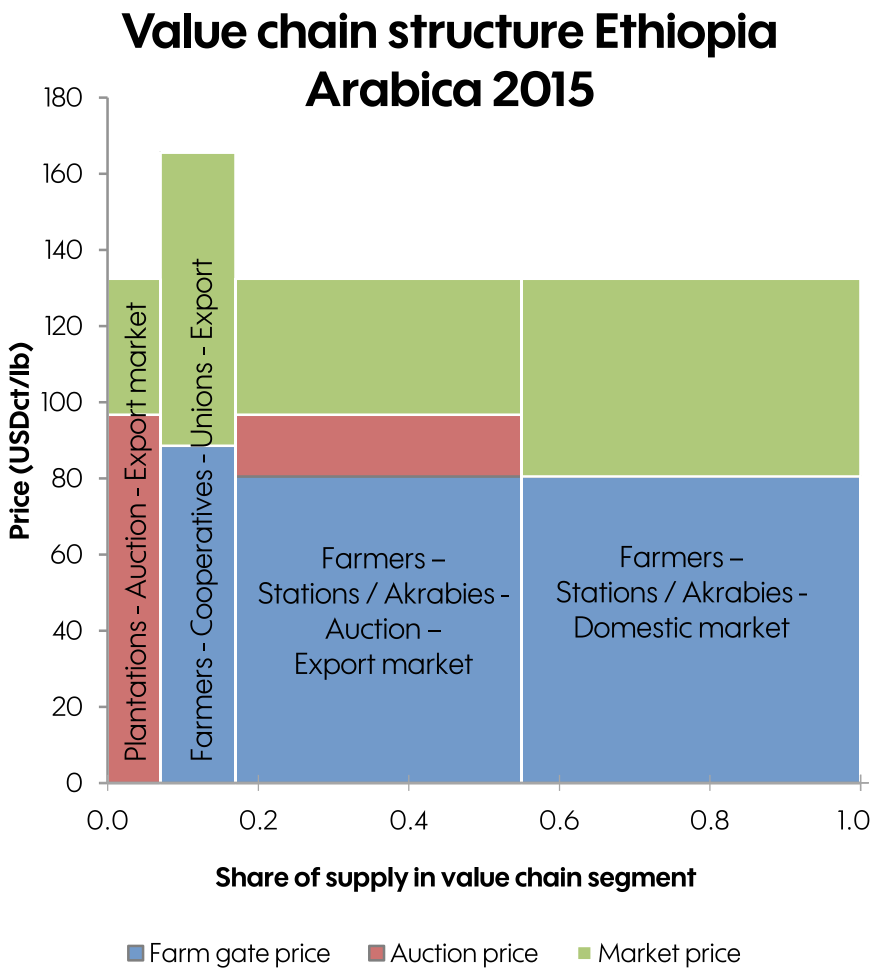


- Export to countries with high interest/investment in sustainability (USA, UK, Switzerland, Germany, Netherlands)
- Export to countries with medium interest/investment in sustainability (France, Belgium, Italy, Spain, Scandinavia)
- Export to countries with low/no interest/investment in sustainability (other markets)

- About half of Ethiopian exports (49%) are to tier 1 and 2 markets, assuming no re-exports from first destination.
- Exports represent just above half of the Ethiopian coffee volume, but the domestic market is not specifically concerned with sustainability. Market interest for sustainability would therefore represent about 25% of production volume.
- Reinforcing the certification interest of specific geographies, the coffee quality also enables certification: with higher price and margins it is easier to absorb certification cost.
- Coffee sold through ECX is currently not traceable to the farmer and as such does not comply with certification requirements. Because of this, the demand for certified coffee from Ethiopia is currently not met.

Sources: OEC, VC and AL analysis

90% OF COFFEE SOLD THROUGH ECX, COLLECTORS ACTIVE AT FARM GATE



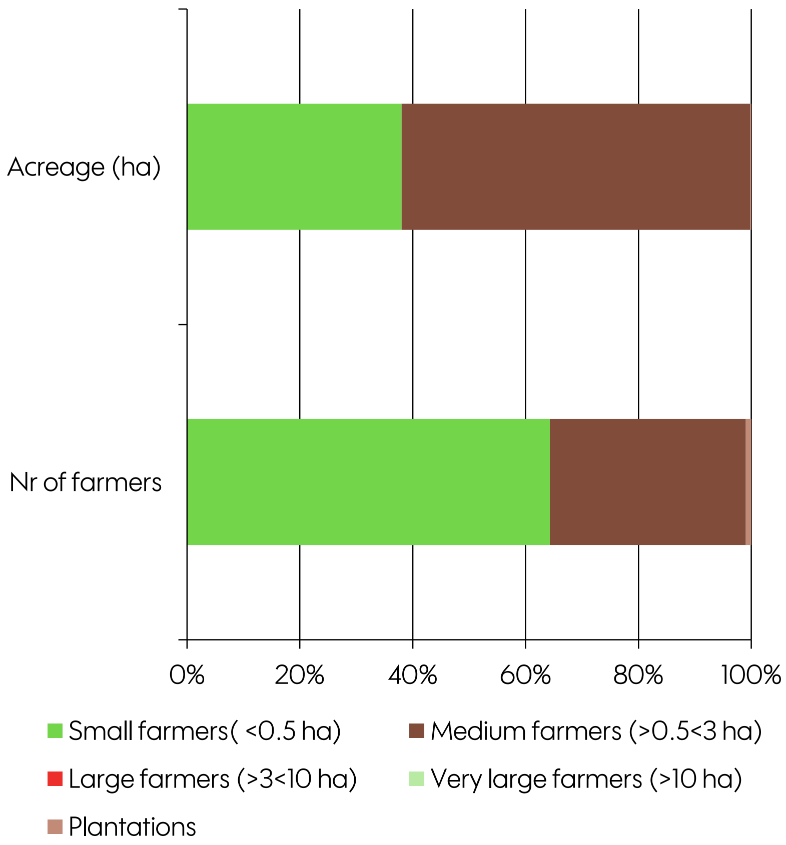
- The Ethiopia Commodity Exchange was introduced in 2008. All export grades are traded through ECX. All lower grades can be traded at the domestic market.
- Market price for domestic and export are largely aligned. Formally, export grades are not allowed to be sold locally, but some smuggling is reported.
- Plantations and cooperatives are allowed to export directly, but plantations often do not have the capacity to do so and choose to sell through ECX. Cooperatives sell mostly sustainably certified coffee to the international market, often via unions.
- Farm gate price has been reported to have improved slightly due to better access to price information.

Sources: USAID, Grantham, ECX, interviews, AL and VC analysis

SECTOR CONSISTS PREDOMINANTLY OF SMALL-SIZED FARMS

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

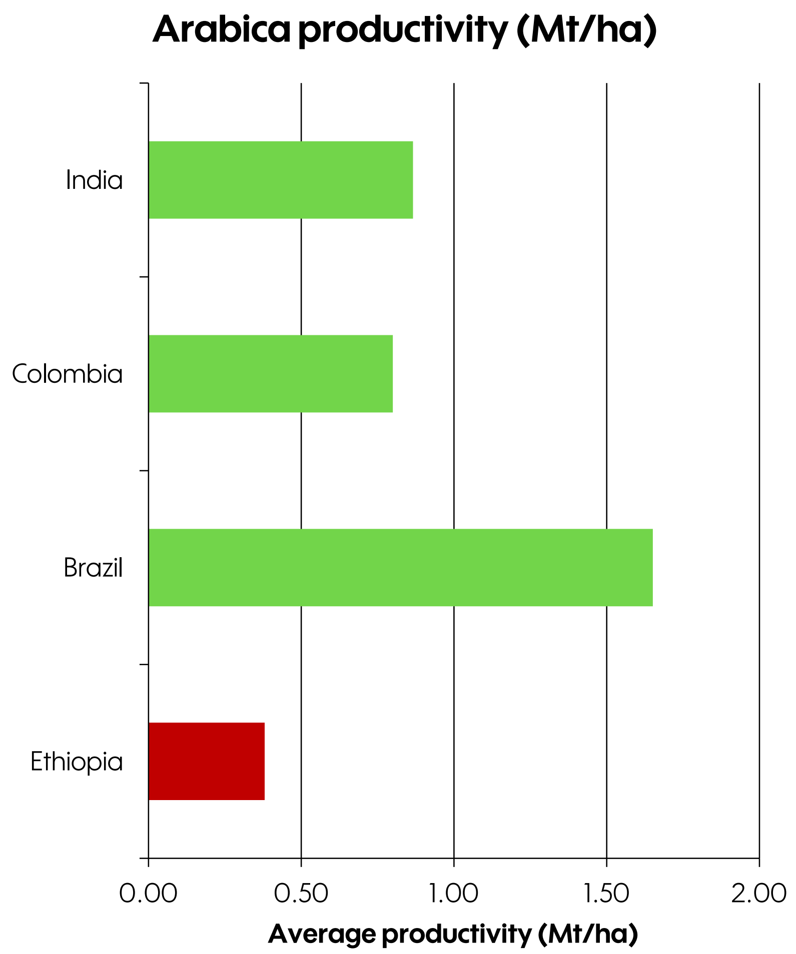
Nr of farmers and acreage distribution



- Average coffee farm size is estimated at 0.67 ha and the number of smallholders at 1.2 million.
- Many studies have been done, but findings vary widely between regions and between survey samples. Average acreage findings range from 0.5 ha to 0.9 ha. There is consensus that farms are very small.
- About 200 plantations produce ~7% of total coffee volume.
- About 10% of smallholders are organized in cooperatives and unions. Even though cooperatives are widely available even in remote villages, and farmer organization is promoted by government, many farmer choose to sell through akrabies and not cooperatives. Report issues include timing of payment and services offered.

Sources: USAID, PSD, IFRPI, FAO, interviews, AL and VC analysis

CURRENT PRODUCTIVITY LEVELS ARE LOW- TO MID-LEVEL AND COULD GROW FURTHER

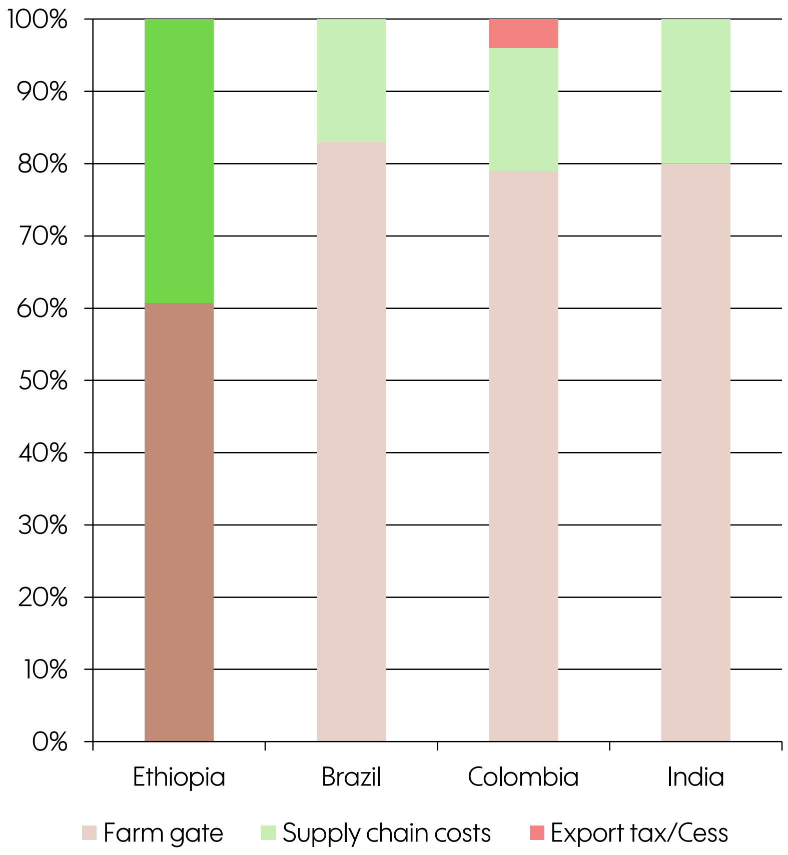


- Many studies have been done, but findings vary widely between regions and between survey samples. Average yield findings range from 260 kg/ha to 700 kg/ha.
- We follow the ESSP producer survey that puts yields at 378 kg/ha (GCE).
- This puts yields behind major Arabica producers such as Brazil and Colombia.
- Even though the ESSP producer survey conducted in 2014 shows significant improvement in coffee management practices, average yield per ha has remained stagnant over time. Yields increased slightly in Sidama, Yirgachefe, and Jimma, but they decreased dramatically in Harar and Nekemte.

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

INEFFICIENT SUPPLY CHAIN ALTHOUGH FARM GATE SHARE OF PRICE IMPROVES

Value distribution Arabica (% of FOB price)

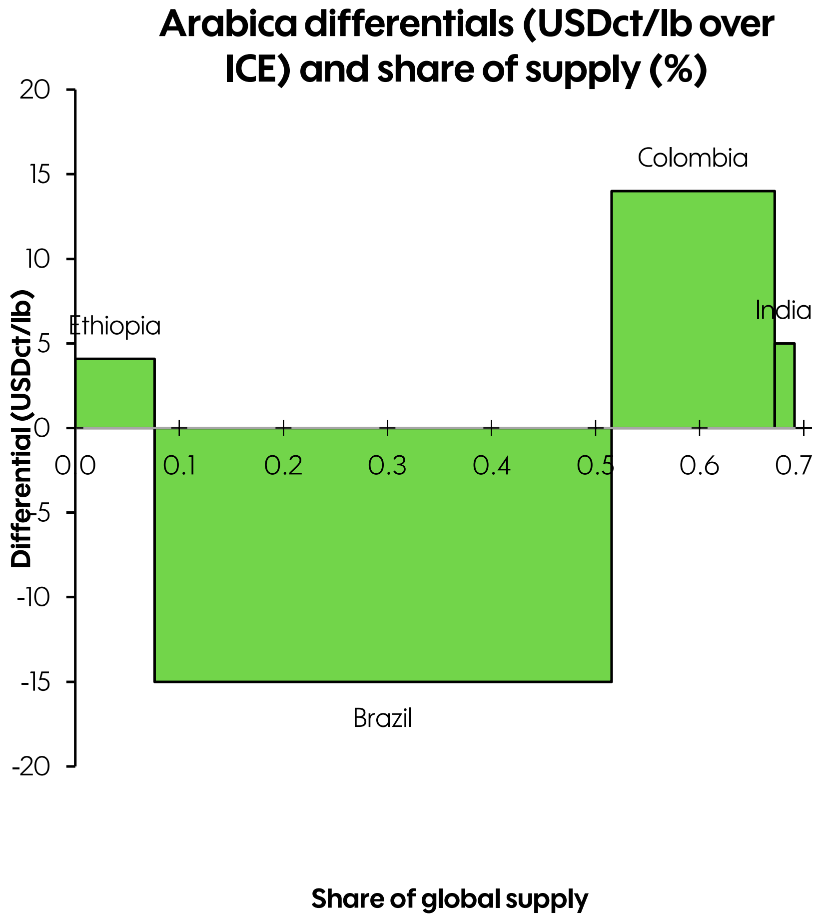


- Farm gate price as % of FOB price is low at 61%, indicating an inefficient supply chain.
- Farm gate prices are approximately 10% higher for coffee sold through cooperatives and exported through unions.
- Small farms, large distances and imperfect infrastructure commonly explain low farm gate prices. Following variation in these factors, farm gate prices also vary.
- Recent research by the Grantham Research Institute shows however that price dispersion has decreased in areas where ECX has opened warehouses, mainly following increased price transparency. This is confirmed by ESSP research indicating farmers have better access to price information. If the trend continues, farm gate prices are expected to increase.
- Export taxes have been waived since 2002.

Sources: Interviews, TNS, USAID, ESSP, Grantham, AL and VC analysis

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

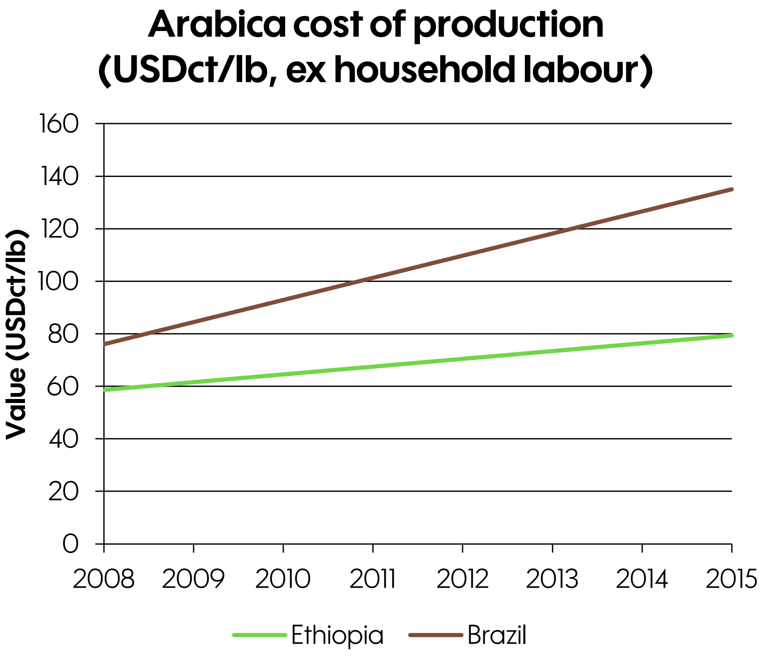
ETHIOPIAN COFFEE TRADED AT PREMIUM, VALUED YET COMPETITIVE

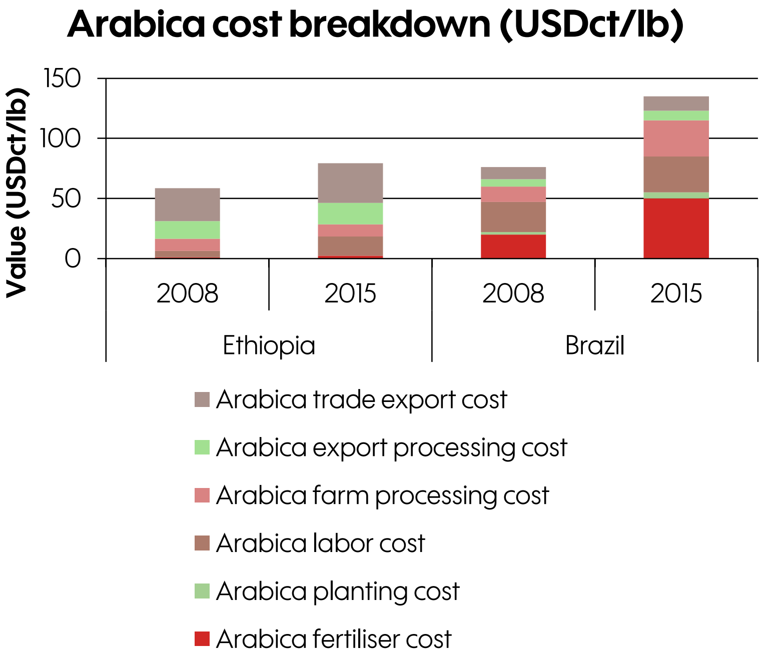


- Differentials have varied over time. Since 2000, Ethiopian coffee has consistently been traded at a premium, currently around 5 USDct/lb.
- Ethiopian coffee is in high demand for its cup profile and reputation.
- Differentials vary for washed/unwashed coffee and based on production region.
- Ethiopian coffee is valued for its quality over large volume producer Brazil, and is competitive in its price compared to other major Arabica origins.

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

COST OF PRODUCTION IS LOW, WHILE COST IN BRAZIL IS INCREASING





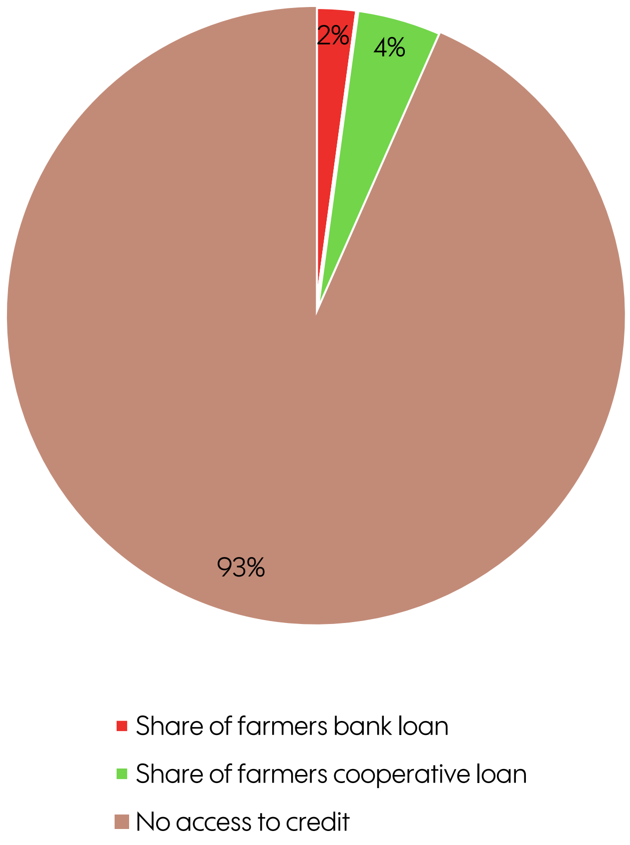
- Ethiopia production costs are lower than Brazil, and are increasing at a lower pace. This is an opportunity for Ethiopia to gain market share. Historically, low-cost producers have gained dominance (e.g. Brazil and Vietnam).
- Supply chain trade and processing cost are however high, and most margins appear to be absorbed in the supply chain and do not benefit farmers.

Sources: Interviews, USAID, TNS, AL and VC analysis

LITTLE ACCESS TO CREDIT, SEVERAL INITIATIVES FOR COOPERATIVES

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

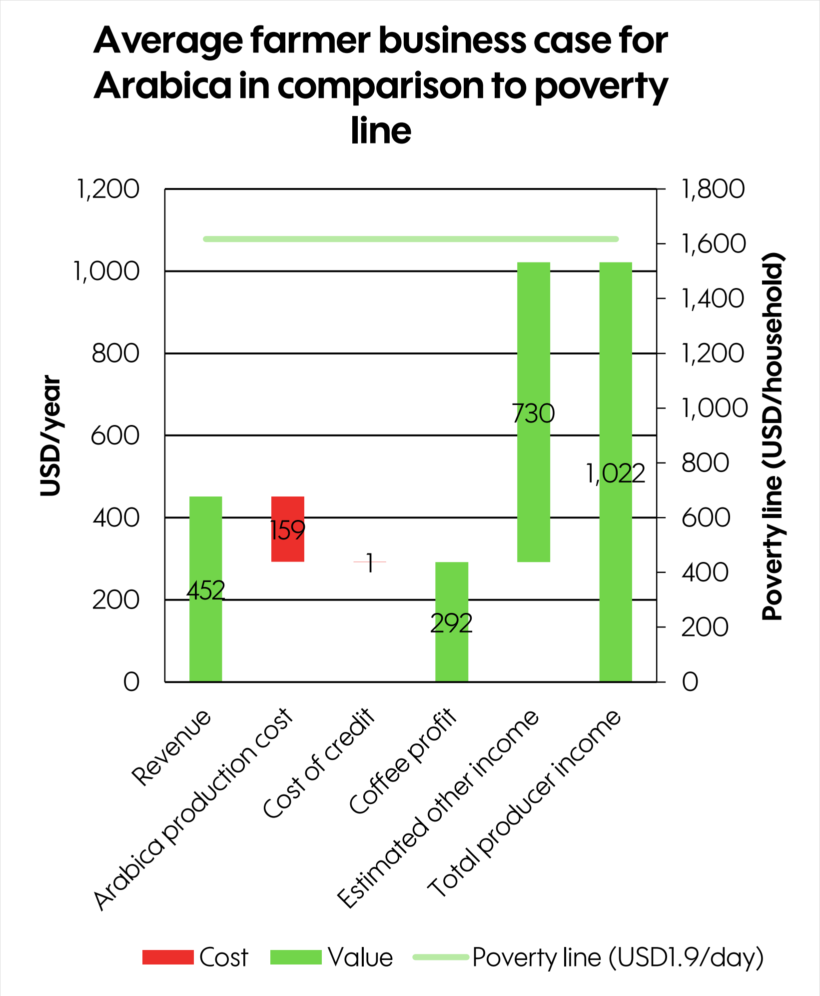
Farmers' access to credit



- Very few smallholder farmers have access to credit. Bank loans are mostly available via MFIs, whereas lending through cooperatives has grown slightly via IFC and other investment and support programmes.
- Most smallholders are unorganized and do not meet investor criteria. Only about 10% of smallholders is a member of a cooperative.
- Interest rates are reasonable at around 11% annually.
- Loans are short term, mainly to finance labour and inputs. The main investment need for farmers would be to finance replanting cost, however no multi-year financial products are available.
- Recent research shows that better access to finance does lead to adoption of new technologies, more for cooperative finance than for MFIs.

Sources: World Bank, AEMFI, IFC, GIZ, IFPRI, AL and VC analysis

COFFEE FARMERS HAVE SIGNIFICANT OTHER INCOME SOURCES

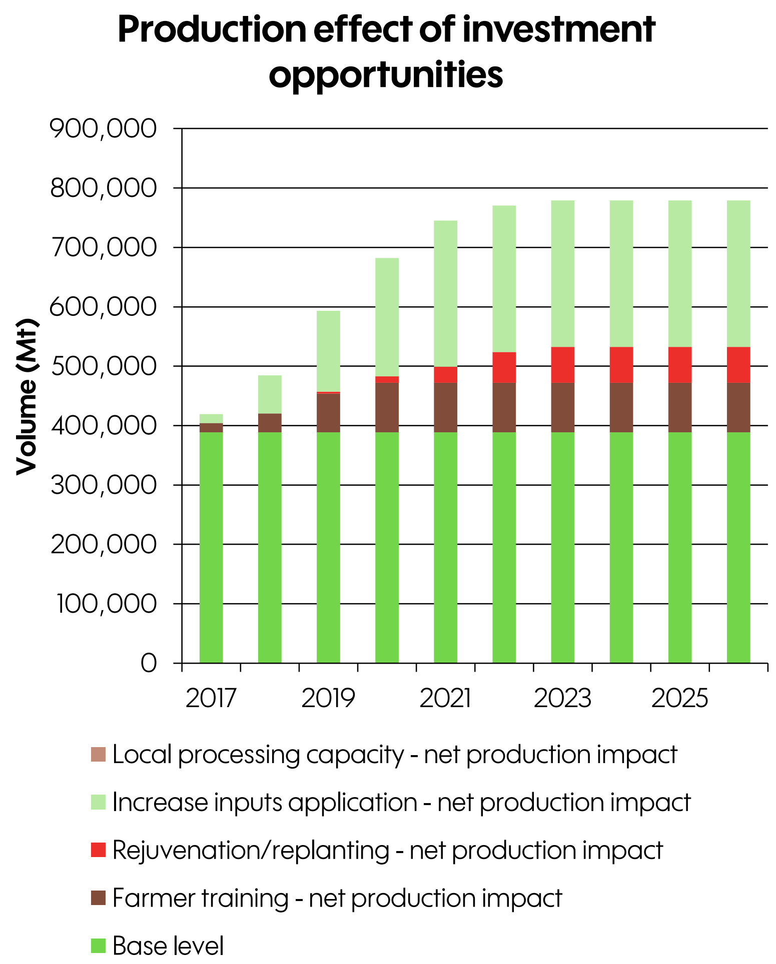


- Based on coffee alone, farming households of on average 6 members are far below the international poverty line.
- Small farms and low yield bring a revenue of 452 USD annually, with cost of production high in relation to revenue.
- Recent ESSP research shows that coffee only represents around 40% of total household revenue, with significant other income sources on and off farm. Common other sources of income include grains, maize and qat, as well as off farm labour.

Sources: Interviews, ESSP, IFPRI, AL and VC analysis

MODELLING INVESTMENT OPPORTUNITIES – PRODUCTION EFFECTS

- Modelling investment opportunities:
  - Farmer training
  - Rejuvenation/replanting
  - Increasing input application
  - Certification
  - Farmer organisation building
  - Access to credit for farmer organisations
- A combination of training, rejuvenation and inputs application could double national production volumes.
- The respective investments are mutually reinforcing, implementing one without doing the others will result in lower return on investment.

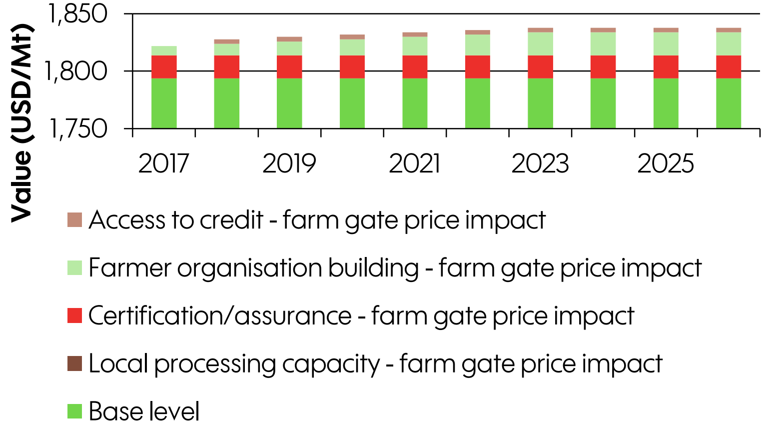


MODELLING INVESTMENT OPPORTUNITIES – PRICE EFFECTS

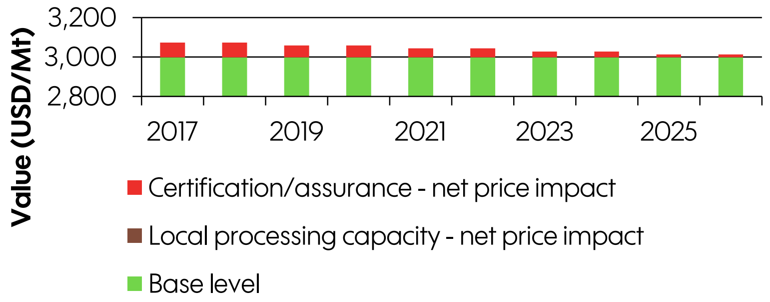
GLOBAL COFFEE PLATFORM
for a sustainable coffee world

- Assuming weighed average base price stable over time.
- Increasing membership and capture rate of farmer organizations, combined with certification, has an effect on farm gate price.
- Given the large market interest in certification, a similar effect can be seen on export price.
- It is however uncertain to what extent these price effects are sustainable, with current trend of declining certification premiums.

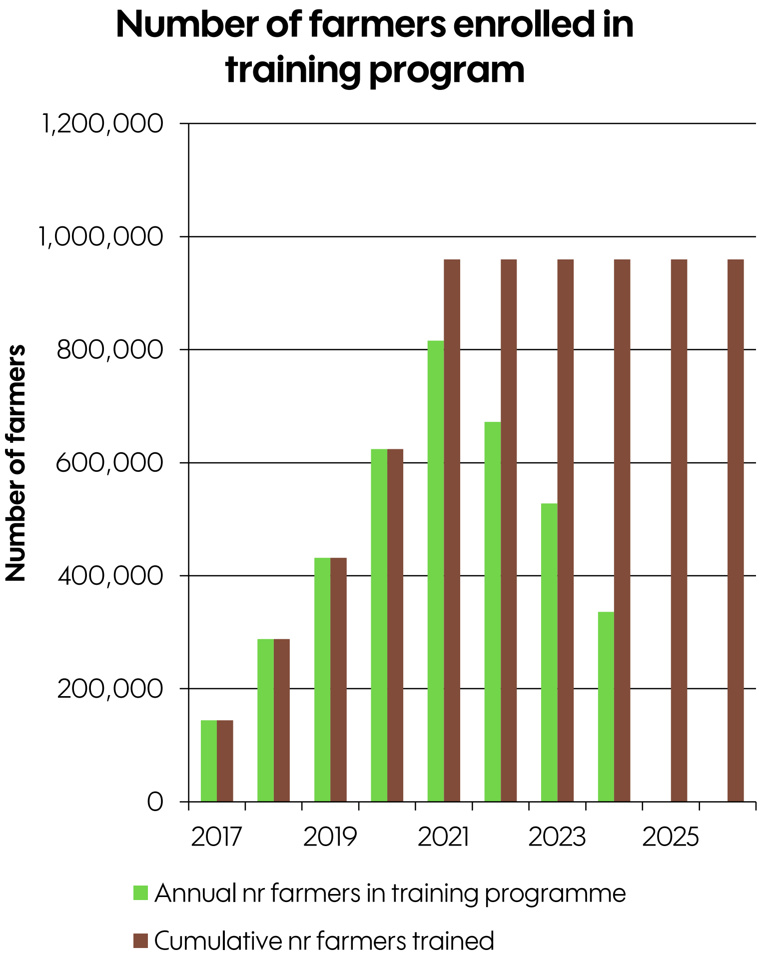
Farm gate price effect of investment opportunities

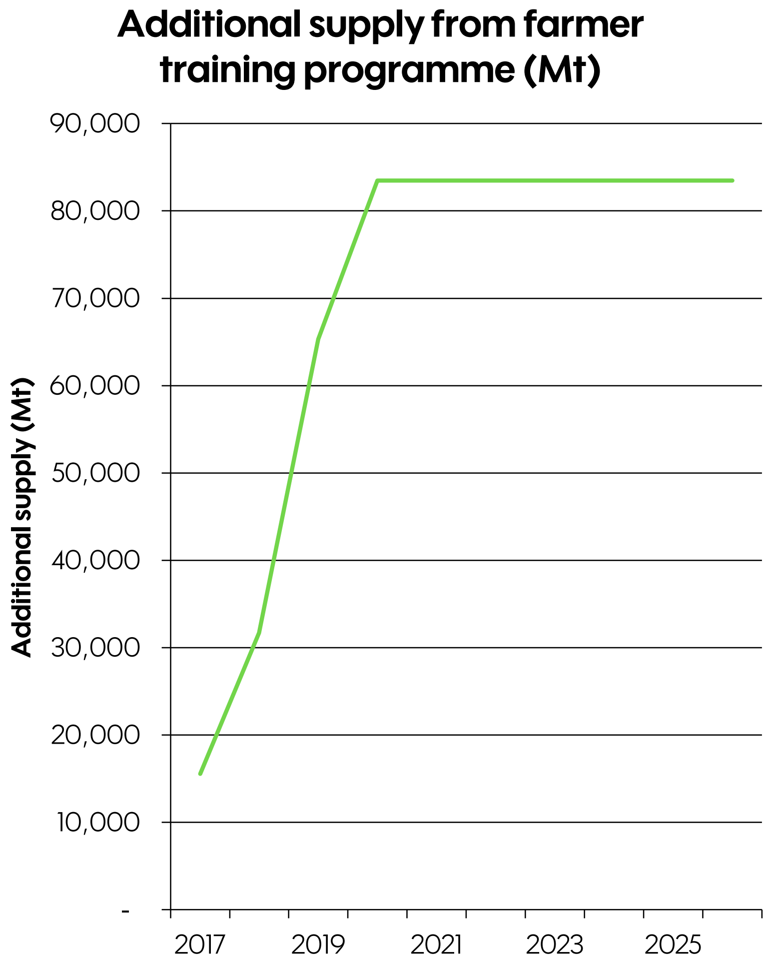


Export price effect of investment opportunities



LARGE SCALE FARMER TRAINING CAN GROW CURRENT SUPPLY





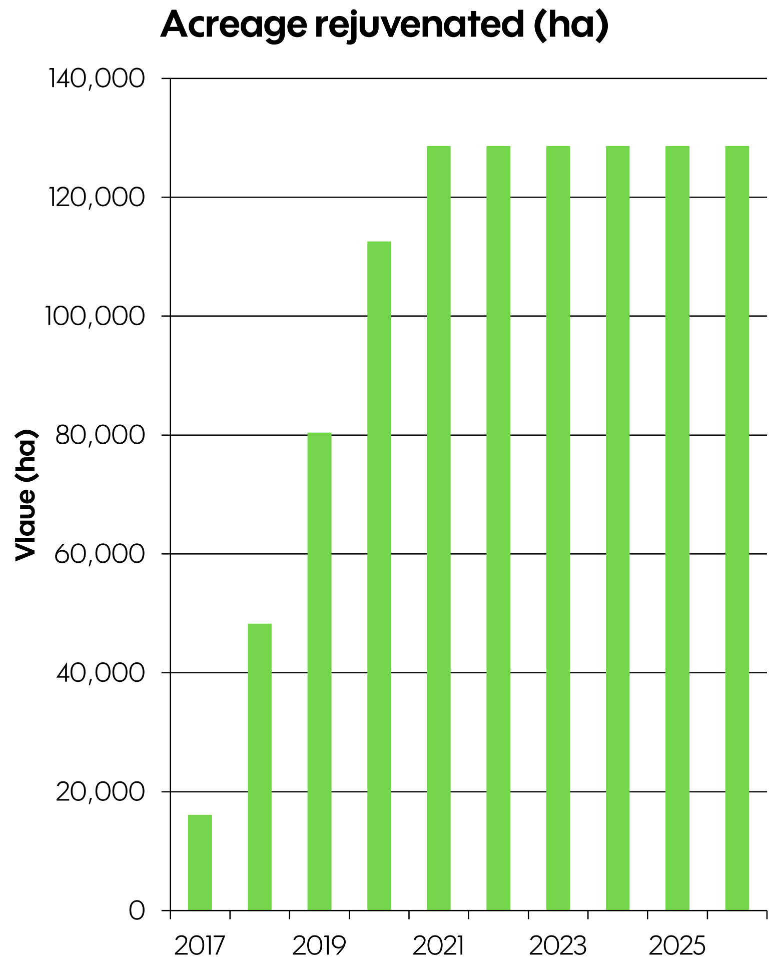
TRAINING INVESTMENT HAS A POSITIVE BUSINESS CASE

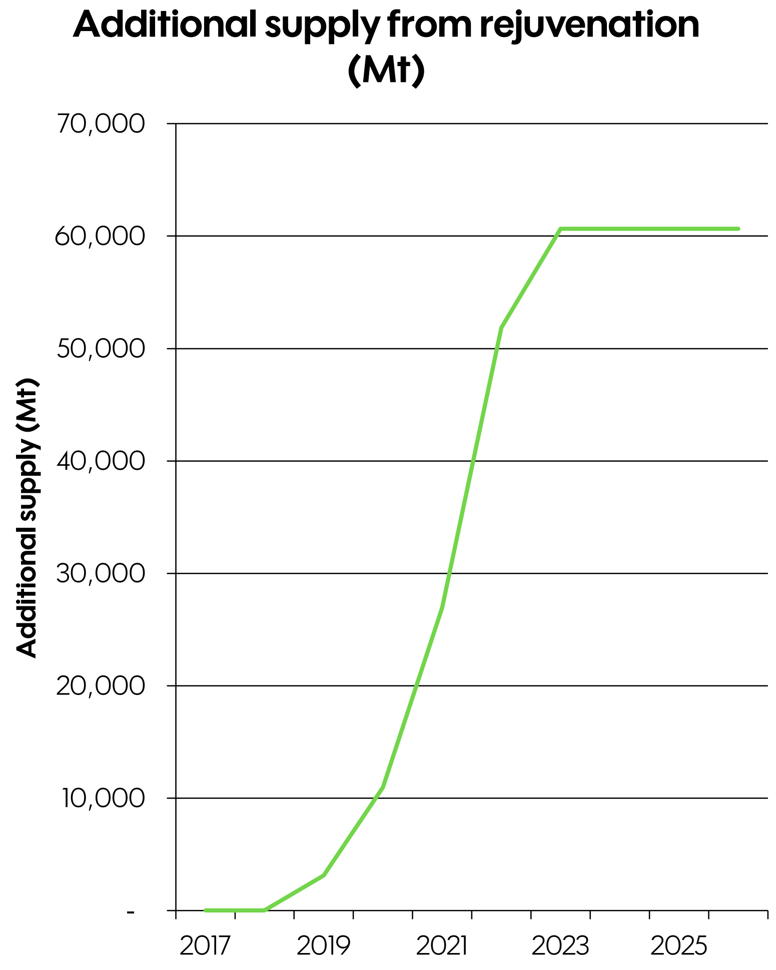
GLOBAL COFFEE PLATFORM
for a sustainable coffee world

- For training on Good Agricultural Practices to be effective it needs to be participatory, intensive and should run for at least 4 years. This is common practice for experienced implementers in Ethiopia and elsewhere.
- Current training programs report cost between $40 and $100 per farmer per year.
- Large scale programs from experienced implementers working through cooperatives have reported an even lower investment need.
- Farmer training is a requirement for other impact investments including rejuvenation and increasing inputs use.

Indicator	Value (10 years)
Cumulative nr of farmers reached	960,000
Additional volume coffee per annum in steady state (Mt)	83,470
Total investment	$ 192,000,000
Total return	$ 2,089,521,870
NPV (10%)	$ 1,061,880,867
NPV (20%)	$ 657,812,317
Investment per farmer	$ 200

REJUVENATION INVESTMENT TAKES A WHILE TO SHOW EFFECTS...





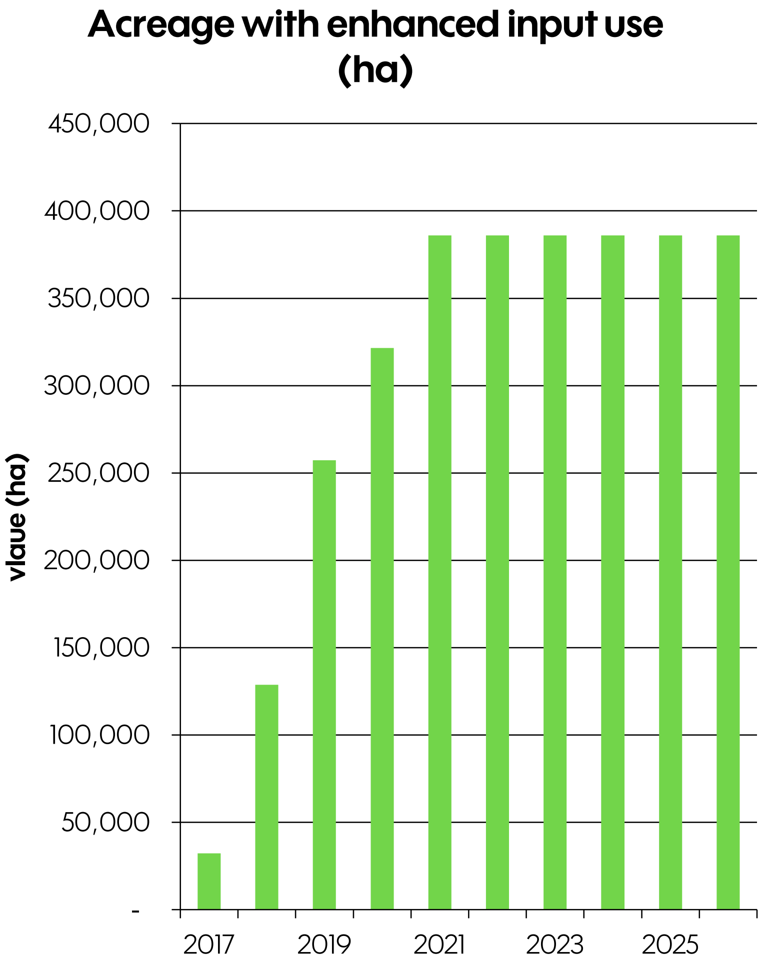
...BUT RETURN ON INVESTMENT IS GOOD, AND PREVENTS YIELD LOSS

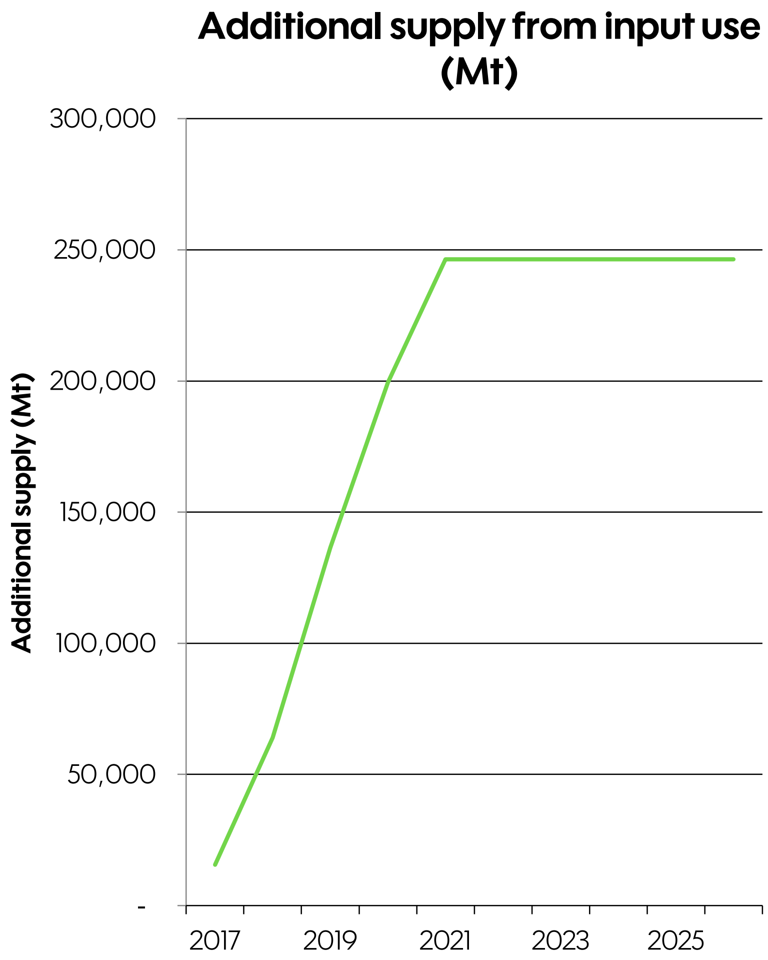
GLOBAL COFFEE PLATFORM
for a sustainable coffee world

- Replanting will bring yield increase, and increased resilience against climate change and pests and diseases.
- Low cost of labour and high local availability of and capacity to produce seedlings makes the investment per ha very low compared to other origins. Family labour will be sufficient to rejuvenate small farms.
- Currently, government also distributes seedlings at very low cost. This may be partly subsidized. Government budget to subsidize these seedlings is not known and not included in this budget. Wild varieties are also use to produce seedlings.
- With these low rejuvenation cost and its significant effect on yields the return on investment is very good.
- In addition, replanting protects from further volume losses.

Indicator	Value (10 years)
Cumulative acreage replanted (ha)	128,640
Additional volume coffee per annum in steady state (Mt)	60,650
Total investment	$ 7,718,400
Total return	$ 1,005,724,240
NPV (10%)	$ 487,349,989
NPV (20%)	$ 259,516,965
Investment per ha	$ 60

INPUT SUPPLY INVESTMENT CAN HAVE A WIDE REACH





INPUT USE CAN INCREASE VOLUMES, BUT FARMER UNLIKELY TO BEAR FULL COST

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

- Increasing inputs use has a positive business case and will increase farmer revenues significantly.
- Promotion of inputs use is a policy decision that should also consider organic premiums and traceability at the ECX.
- Small-scale farmers tend to be risk averse as one failed crop is enough to undermine their living conditions.
- Only farmers that are part of the training programme should make use of the additional input supply investment to ensure optimal use.

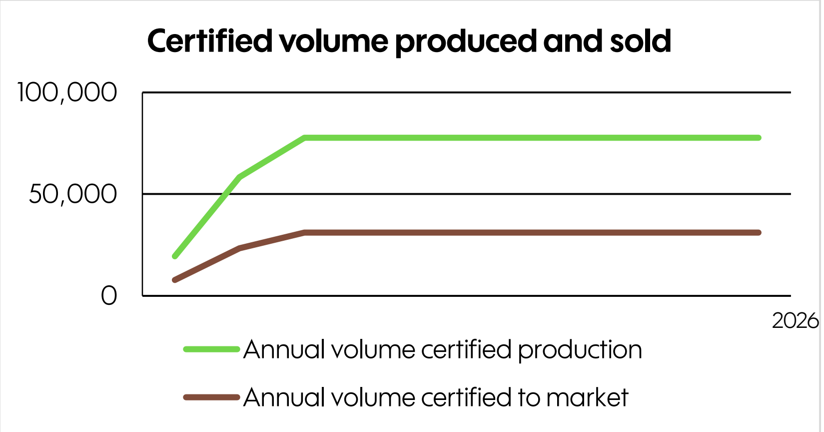
Indicator	Value (10 years)
Acreage using additional inputs in steady state (ha)	385,920
Additional volume coffee per annum in steady state (Mt)	246,454
Total investment	$ 305,520,000
Total return	$ 5,679,596,381
NPV (10%)	$ 2,945,430,158
NPV (20%)	$ 1,778,509,751
Investment per ha per year	$ 100

CERTIFICATION CAN BE USED TO INVOLVE PRIVATE SECTOR

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

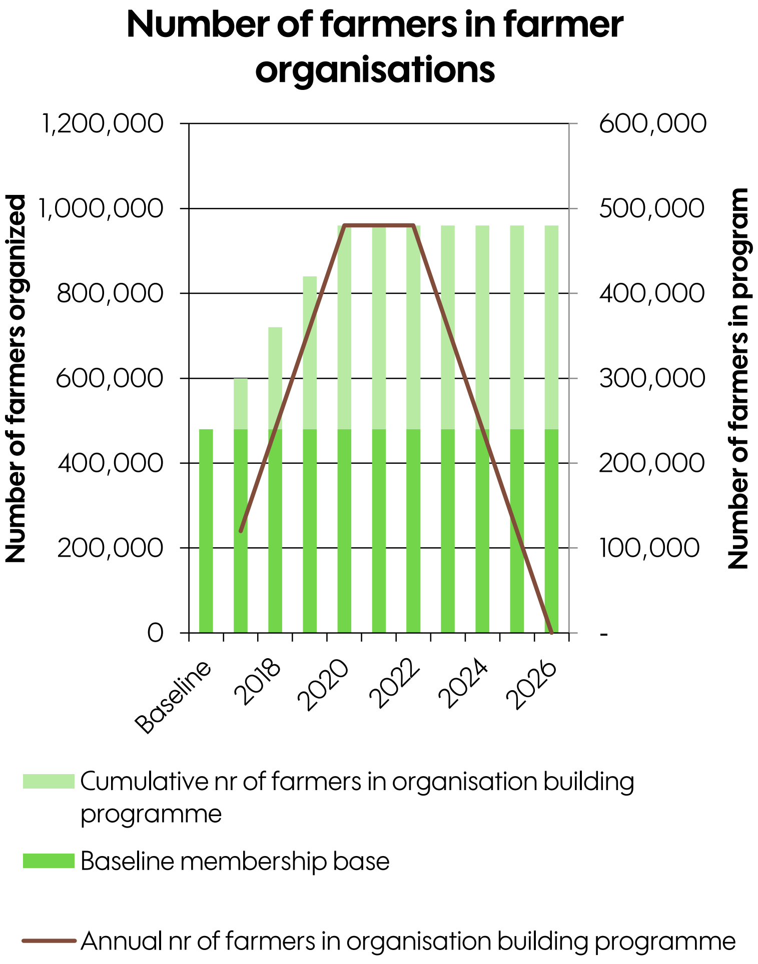
- Given high market interest in certification for Ethiopia, we assume a higher marketability rate and higher premiums compared to other origins.
- Certification can be implemented through farmer cooperatives as is the current requirement for traceability in Ethiopia.
- Using certification is expected to trigger private sector investments in training, rejuvenation and inputs. This benefits the farmer with yield increase and a small price premium.
- It is uncertain to what extent these price effects are sustainable, with current trend of declining certification premiums.

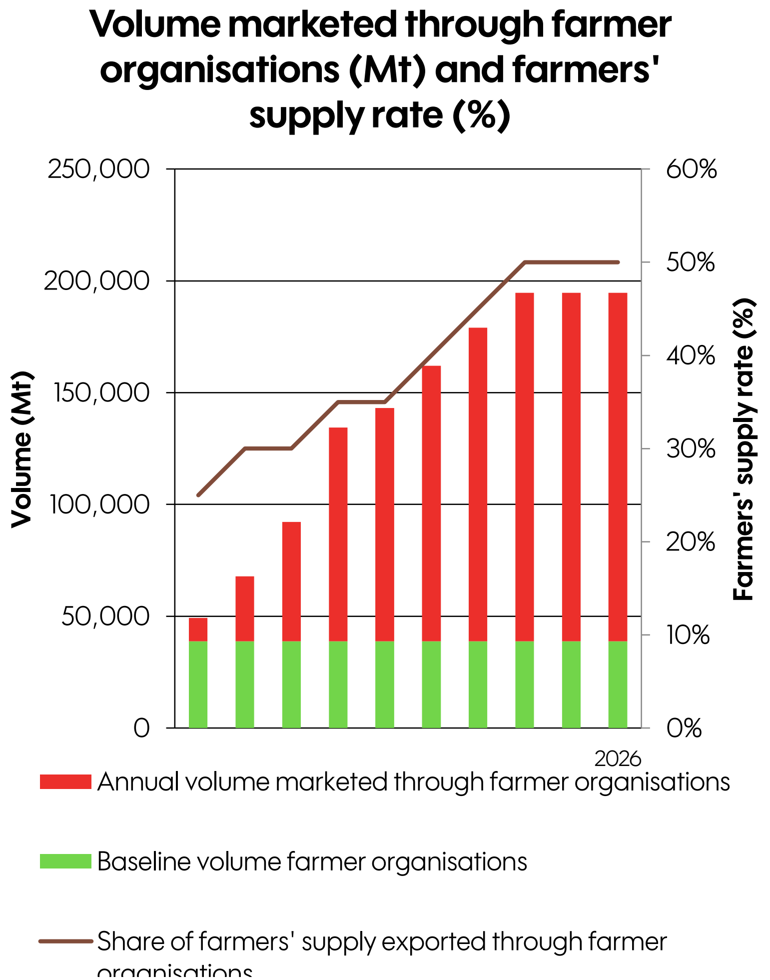
Indicator	Value (10 years)
Volume of certified coffee produced per annum in steady state (Mt)	77,700
Volume of certified coffee marketed per annum in steady state (Mt)	31,080
Additional value of certification premiums per annum in steady state	$ 465,969
Total investment	$ 7,200,000
Total return	$ 11,649,228
NPV (10%)	$ 1,630,432
NPV (20%)	$ 307,006



EXISTING COOPERATIVES CAN BE STRENGTHENED AND GROWN

GLOBAL COFFEE PLATFORM
for a sustainable coffee world





GROUPING NOT COMMERCIALLY VIABLE, BUT WITH SIGNIFICANT IMPACT ON FARMERS

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

- Cooperatives are encouraged by government and exist widely, although many farmers choose not be a member and/or not to sell through the cooperative. Common issues include payment, management and lack of service.

- Cooperatives currently obtain 25-30% higher export prices, but pay a farm gate price only 10% above average.

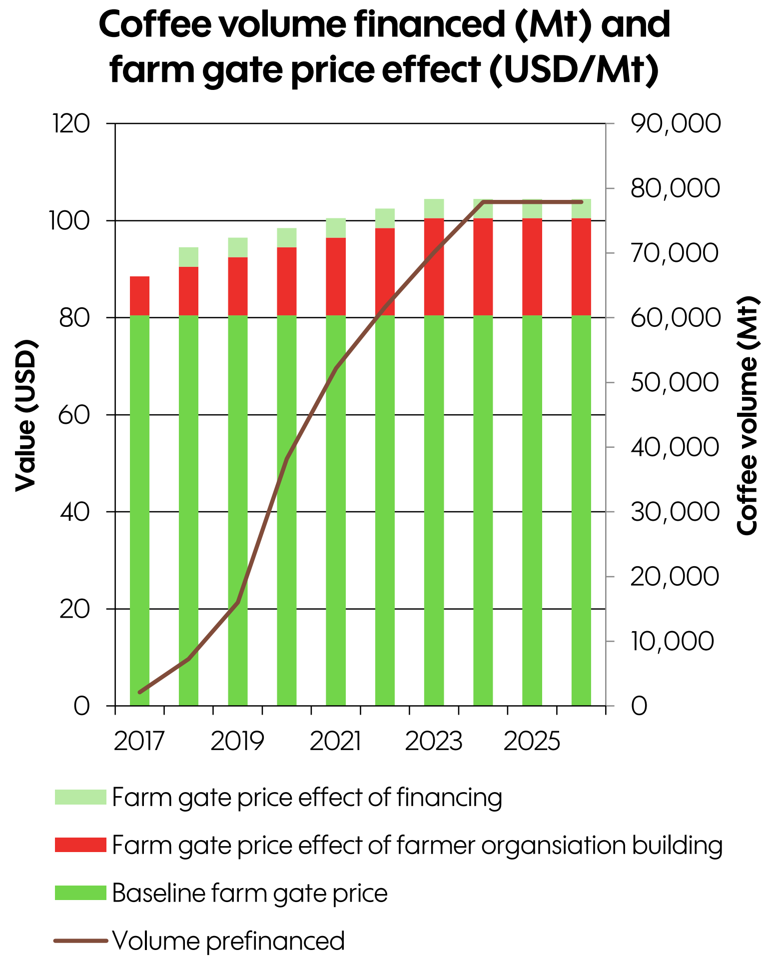
- Current cooperatives export about 10% of volume, and likely have a larger share of farmers as a membership base. A capacity building programme is 5 years, after which cooperatives are expected to function well for an increased membership base and with an increased capture rate. Grouping farmers in cooperatives enables certification and training.

- For farmers, the effects can be significant. Donors that do not seek a commercial return on their investment are required for this type of intervention.

Indicator	Value (10 years)
Number of farmers in improved farmer organizations in steady state	480,000
Volume of coffee through farmer organizations in steady state (Mt)	194,665
Additional farm gate value per annum in steady state	$ 3,116,296
Total investment	$ 37,200,000
Total value redistribution	$ 18,394,132
NPV (10%)	$ -17,105,872
NPV (20%)	$ -14,370,612

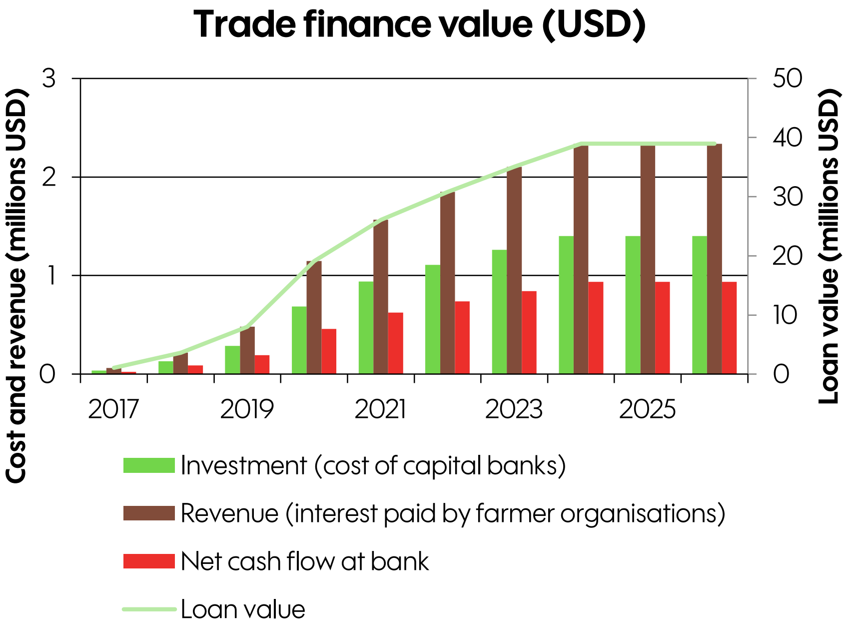
ACCESS TO TRADE FINANCE FOR FARMER ORGANISATIONS CAN FURTHER ENHANCE FARM GATE PRICES AND SUPPLY RATES

GLOBAL COFFEE PLATFORM
for a sustainable coffee world



- Once farmer organisations are strengthened, short term pre-financing for trade activities can help to redistribute more value to farmers. Following larger volume marketed through cooperatives, average farm gate prices will increase.
- Government policy largely impacts liquidity and profitability of banking. Organization capacity building is critical to manage risk appetite of banks.
- This investment does not create new value, but rather facilitates redistribution from downstream segments of the value chain to farm level.
- This could be of interest to impact investors that want a commercial and social return on investment.

PROVIDING TRADE FINANCE TO WELL-RUN FARMER ORGANISATIONS CAN BE AN ATTRACTIVE PROPOSITION FOR BANKS



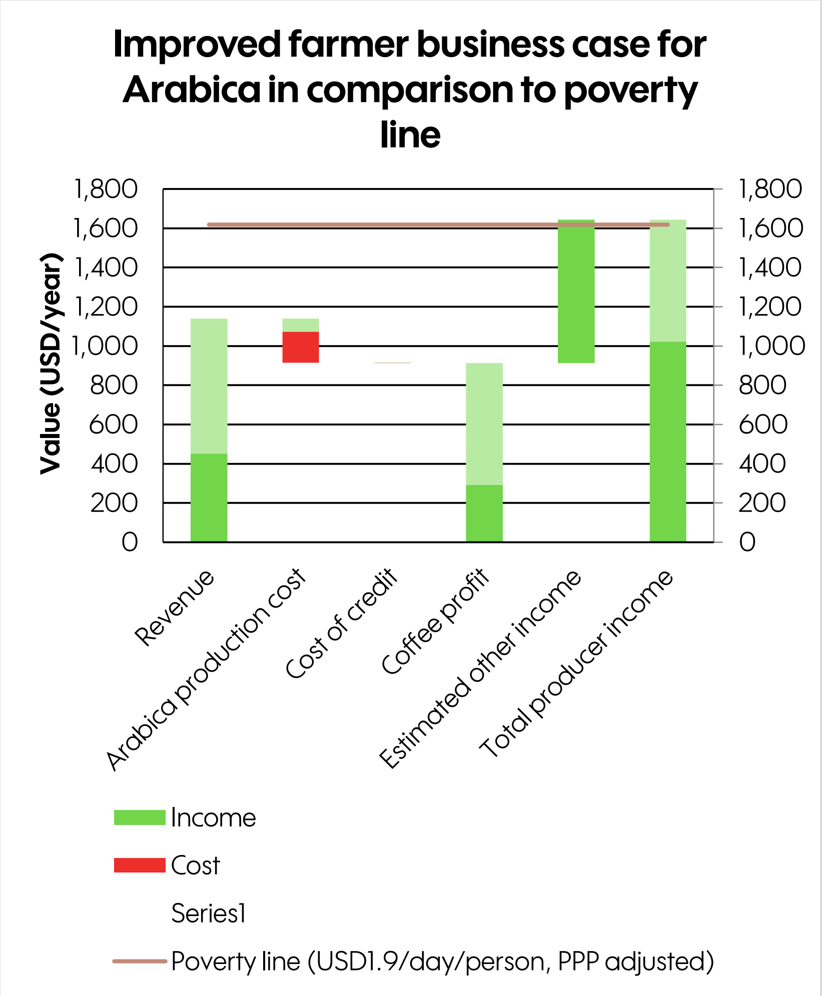
Indicator	Value (10 years)
Volume of coffee pre-financed p.a. in steady-state (Mt)	77,907
Loan size in steady-state p.a.	$ 38,953,698
Total investment (cost of capital for banks) over 10 years	$ 8,662,078
Total return	$ 14,436,797
NPV (10%)	$ 7,458,800
NPV (20%)	$ 4,243,905

- Current pre-finance interest rates in Ethiopia are relatively low, but with the large involvement of the state in banking, so is the cost of capital for banks. This provides a positive NPV.
- Furthermore, pre-finance will enable farmers to improve their livelihoods via adoption of new technologies. This effect has been observed by IFPRI.

SIGNIFICANT POSITIVE IMPACT ON FARMERS, JUST ABOVE POVERTY LINE

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

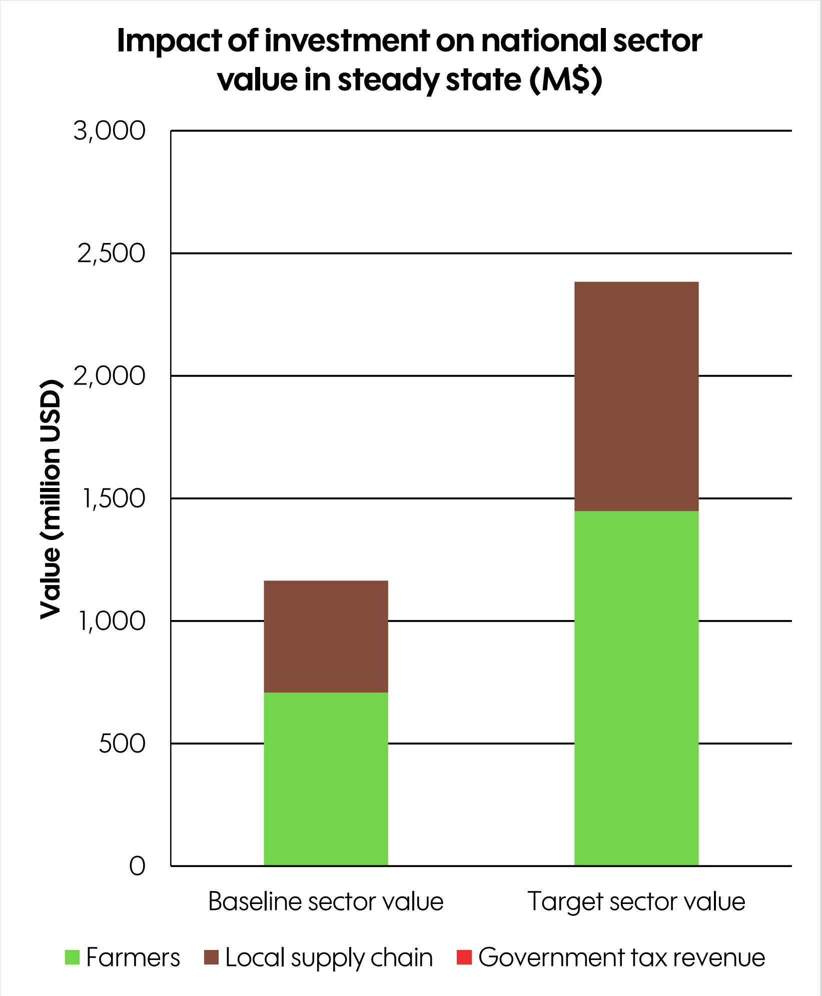
- Significant positive impact on farmer income, both from improved farm gate price and increased volumes.
- The combination of these interventions can lift farmers out of poverty, and develop healthy smallholder farming systems based on coffee and one or more other crops.
- If combined with investments in other crops, further wealth can be created in farmer communities.



RETURN ON INVESTMENT IS GOOD, WITH SIGNIFICANT IMPACT

Summary	USD over 10 years
Total investment	$ 564.075.197
Total return	$ 9.093.461.511
NPV (10%)	$ 4.625.453.164
NPV (20%)	$ 2.768.118.360

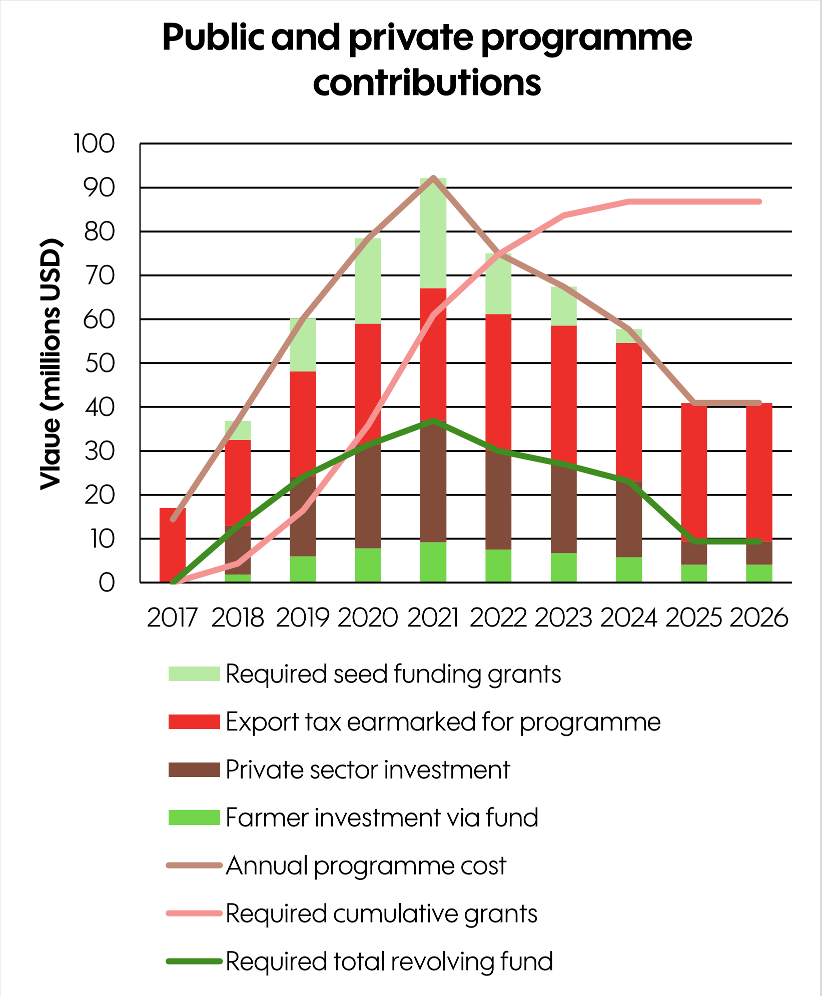
- Investment in coffee can significantly increase the sector value for all actors in the value chain.
- The majority of value flows into the rural economy.
- As productivity improves, local supply chains benefit, primarily from additional supply.



... WILLINGNESS TO INVEST IN THE INTEREST OF FARMERS

- Private sector is willing to invest in sustainability in Ethiopia.
- Reinstalling an export tax of 4.5% which will be fully allocated to the program would allow to fund this in the interest of farmers. Of course, the national contribution could also be financed from other sources.
- Grants are needed as initial seed funding to fill the funding gap and allow investment in farmer organisation building. Current annual budget of donor programs is estimated between 5-10 million USD, and more coordination between programs based on a sector strategy can largely address the grants requirement.

Summary	Value
ACF revolving fund size	$ 36,866,087
Required grant funding	$ 86,768,479
Required grant funding %	15%
Required national budget (% export tax)	90%



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

- Ethiopia is recognized as the birthplace of coffee, and represents **4.3% of global coffee production**. **Arabica quality is valued and production costs are competitive**. The production is largely characterised by **small farms of on average 0.67 ha**, and many below 0.5 ha. With low to moderate yields, incomes are low for an estimated 1.2 million coffee farmers. Farmers have significant other incomes sources in addition to coffee. Even though an increase in farm gate prices as share of FOB has been reported in recent years, **farmers currently receive an approximate 61% of FOB price, indicating supply chain inefficiencies**.

- There is significant potential to increase the coffee sector value in Ethiopia through selective investment in farmer training, farm rejuvenation, use of inputs, certification and farmer group development. **Over a period of 10 years a cumulative investment of ~564 million USD can lift farmers above the poverty line and double the coffee GDP** for the country.

- Several actors show a willingness to invest, with **high private sector sustainability interest** in Europe and North America, **Ethiopian government investments**, and much **interest from the donor community**.

Sources
Global Coffee Platform, Volcafe, Olam, Technoserve, IFPRI, Hanns R. Neumann Stiftung, Café Africa, Nestle

Data
US Department of Agriculture, Food and Agriculture Organisation, International Coffee Organisation, ECX, OEC, Technoserve, USAID, 4C Association, UTZ Certified, Agri-Logic

GLOBAL COFFEE PLATFORM
for a sustainable coffee world

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.