



Communications Update

International Coffee Organization
24 September 2014



Overview of Objectives

- Short-term: Improve the ICO's visibility in social and traditional media
- Medium-term: Redesign the ICO's website, develop a communications strategy, and improve internal communications
- Long-term: Engage key audiences, journalists, and bloggers around key ICO projects and information



Short-Term Objectives

- Engage existing and new audiences on social media
- Foster existing and create new relationships with members of the media—both traditional and online

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4th Consultative Forum On Coffee Sector Finance:
**Bridging the Gap Between
Farmers and Finance**

LIVE webcast

www.ico.org
23 September 2014
8:00am GMT (9:00am BST)

#CoffeeSectorFinance

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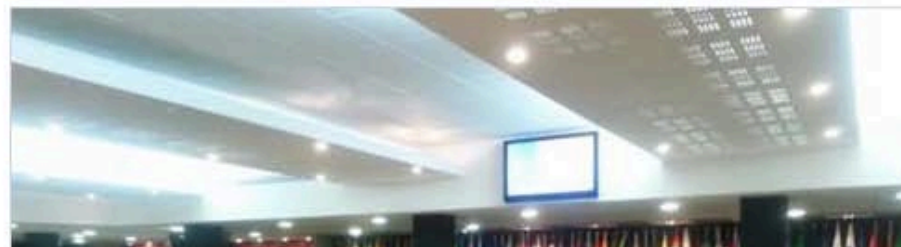


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RT Eugenia Londoño V.: Panel discussion about coffee projects, financial and technical assistance at the #CoffeeSectorFinance
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**Bridging the Gap Between
Farmers and Finance**

LIVE webcast

23 September 2014
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Gracias por acompañarnos en el 4o Foro sobre [#CoffeeSectorFinance](#). Los vídeos y las presentaciones estarán en nuestra página web en breve.



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Merci de nous avoir rejoint au 4e Forum



International Coffee Organization

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The International Coffee Organization (ICO) is the main intergovernmental organization for coffee, bringing together exporting and importing Governments to tackle the challenges facing the world coffee sector through international cooperation. Its Member Governments represent 94% of world coffee production and over 75% of world consumption.

The ICO's mission is to strengthen the global coffee sector and promote its sustainable expansion in a market-based environment for the betterment of all participants in the coffee sector.

Learn more at www.ico.org

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Coffee Sector, International Coffee Agreement

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1 DAY AGO

Op-Ed: Leading the Way In Climate Change Mitigation: The Case of Costa Rican Coffee Cooperative Coopedota



Robério Oliveira Silva
Executive Director,
International Coffee Organization

LEADING THE WAY IN CLIMATE CHANGE MITIGATION:

THE CASE OF COSTA RICAN COFFEE
COOPERATIVE COOPEDOTA

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In the July/August 2014 edition of GCR Magazine, we advocated for public-private partnerships to support climate change adaptation measures for coffee farmers.

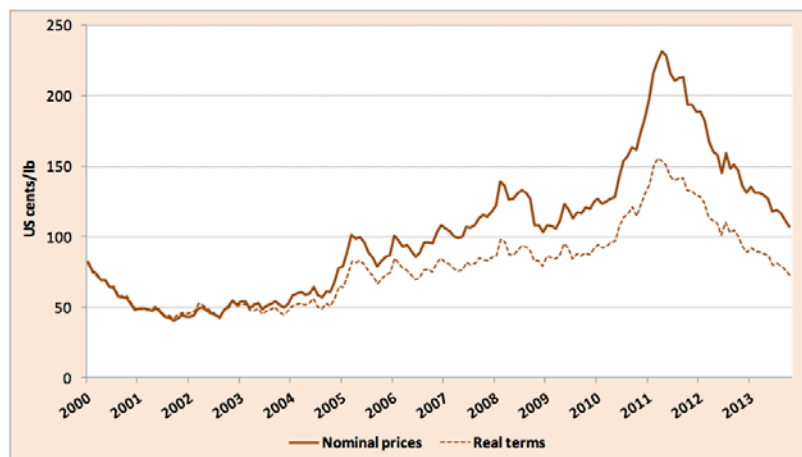
MONTHLY COFFEE MARKET REPORT

October 2013

Coffee prices suffered further declines in October 2013, with the prices of all four group indicators sliding rapidly over the course of the month. The monthly average of the ICO composite indicator price now stands at its lowest level since March 2009, and the severe downward trend observed over the last two years shows no sign of slowing. Despite a slight decrease in September, total exports for coffee year 2012/13 reached a record volume of 110.2 million bags, comprising 68.5 million bags of Arabica and 41.7 million of Robusta. Total production in 2012/13 is also estimated at a record volume of 145.2 million bags. World consumption is estimated at 142 million bags for calendar year 2012, and growing at around 2.4% per annum.

It is too early to provide an estimate of world production in 2013/14, which is now under way in all exporting countries, but early indications suggest potential decreases in some leading exporters. Brazil is in the off-year of its biennial cycle, and the damage from coffee leaf rust in Central America is expected to become more evident. Furthermore, it should be noted that the current low prices are likely to discourage farmers from investing and maintaining their crops, which may negatively affect future production levels.

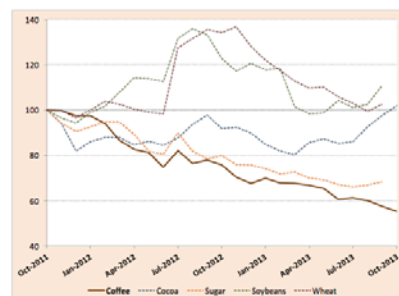
Graph 1: ICO composite indicator price
(Monthly averages: January 2000 to October 2013)



Price movements

The ICO composite indicator price averaged 107.03 US cents/lb in October 2013, a 4.3% decrease on September and its lowest level since March 2009. Furthermore, in real terms¹ the composite indicator is now below its level of January 2000 (see Graph 1), which marked the beginning of the period known as the 'coffee crisis'. There can be no doubt that in many countries the prices received by coffee growers fail to cover the unit costs of production, while at the same time the prices of basic goods, such as food and energy, are rising. Indeed, coffee is the worst performing agricultural commodity of the last two years (see Graph 2), with a downward trend that has so far shown no sign of improving.

Graph 2: Monthly commodity prices²
(Index: October 2011=100)

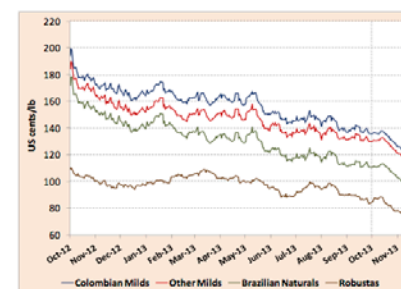


All four group indicators fell sharply over the course of the month, as shown in Graph 3. Colombian Milds dropped by 3.4%, Other Milds by 2.7% and Brazilian Naturals by 2.7%, to their lowest levels since December 2008, March 2009 and July 2009 respectively. The most significant decline was observed in Robustas, which fell by 4.6% to 83.70 US cents/lb, their lowest level in three years.

In terms of differentials, the most notable development was the change in the differential between Colombian Milds and Other Milds, which

fell by 18.8% to 5.13 US cents/lb, the narrowest gap in five years. This is indicative of the increased supplies coming out of Colombia compared to Central America. The arbitrage between the New York and London futures markets, on the other hand, widened by 4.6% to 43.58 US cents/lb, but is still relatively low compared to the last four years.

Graph 3: ICO group indicator daily prices
(1 October 2012 to 6 November 2013)



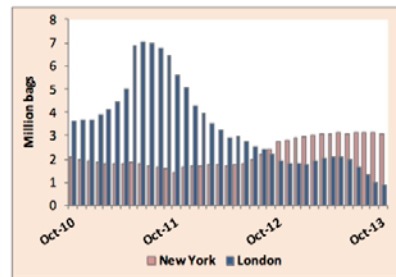
Market fundamentals

Total production by all exporting countries for crop year 2012/13 is maintained at around 145.2 million bags, a 9.8% increase on 2011/12. Looking ahead to 2013/14, it is too early to provide an estimate for world production, but the Brazilian authorities have provisionally forecast a 6.5% decrease in Brazil's off-year crop to 47.54 million bags. Furthermore, the Vietnam Coffee and Cocoa Association (Vicofa) have indicated that they are expecting a 15% decrease in production in 2013/14, attributed to dry conditions earlier in the harvest, exacerbated by the effects of Hurricane Nari at the beginning of October. Finally, it should be noted that the damage arising from the outbreak of coffee leaf rust in Central America, which resulted in the loss of 2.7 million bags of coffee in 2012/13, is expected to be more significant in the current crop year.

¹ Nominal prices deflated using the UN Index for Manufactured Goods Exports by Developed Economies (2000=100)

² Sources: World Bank Databank; ICO composite indicator price; International Cocoa Organization

Graph 4: Certified stocks in London and New York
(October 2010 to October 2013)



Graph 4 shows certified stocks on the New York and London futures exchanges at the end of October 2013. Stocks in New York have maintained a level of around 3.1 million bags over the last six months, but those on the London market have fallen to the historically low level of just 0.9 million bags.

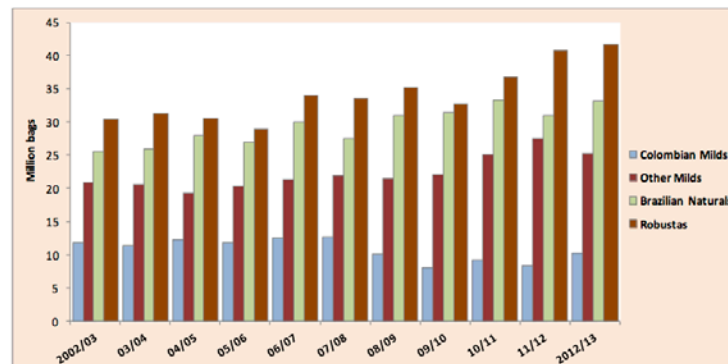
Total exports

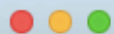
Exports in September 2013 amounted to 7.8 million bags, compared to 8.2 million in September 2012. This brings total exports for coffee year 2012/13 to a record volume of 110.2 million bags, up 2.3% on 2011/12. The strongest increase was recorded in shipments of Colombian Milds, which jumped by 21.2% to 10.2 million bags, mostly as a result of the ongoing recovery in Colombia.

Exports of Other Milds, on the other hand, fell by 8.3% compared to 2011/12, as coffee leaf rust continued to exert a negative effect on production in Central America. Exports of Other Milds from Honduras fell by 20.7% and from Peru by 18.3%, while slight decreases of 1.6% and 1.5% were also recorded in Guatemala and Mexico. In terms of Brazilian Naturals, total exports for 2012/13 increased by 6.8% to 33.1 million bags, with most of this increase attributable to a strong increase in exports from Brazil, as well as a 5.1% increase by Ethiopia. Brazilian Naturals therefore accounted for some 30% of world exports, up from 28.8% in 2011/12.

Finally, the most dynamic growth over the last few years has been in exports of Robustas, which reached a record 41.7 million bags, accounting for 37.8% of the world total, and 2.1% higher than 2011/12. This increase was despite a decrease in exports from the largest origin of Robustas, Vietnam, which fell by 7.2% to an estimated 19.7 million bags. However, this was more than offset by a strong increase of Robusta exports from Indonesia, which rose by 40.2% to a record volume of 8.4 million bags. Uganda also registered a notable increase of 45.4% in its Robusta exports to 2.8 million bags, compared to 1.9 million in 2011/12.

Graph 5: Total exports by group of coffee
(Coffee years 2002/03 to 2012/13)



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August 2014: Coffee Market Remains Volatile But Lacks Direction

Coffee
Market Report



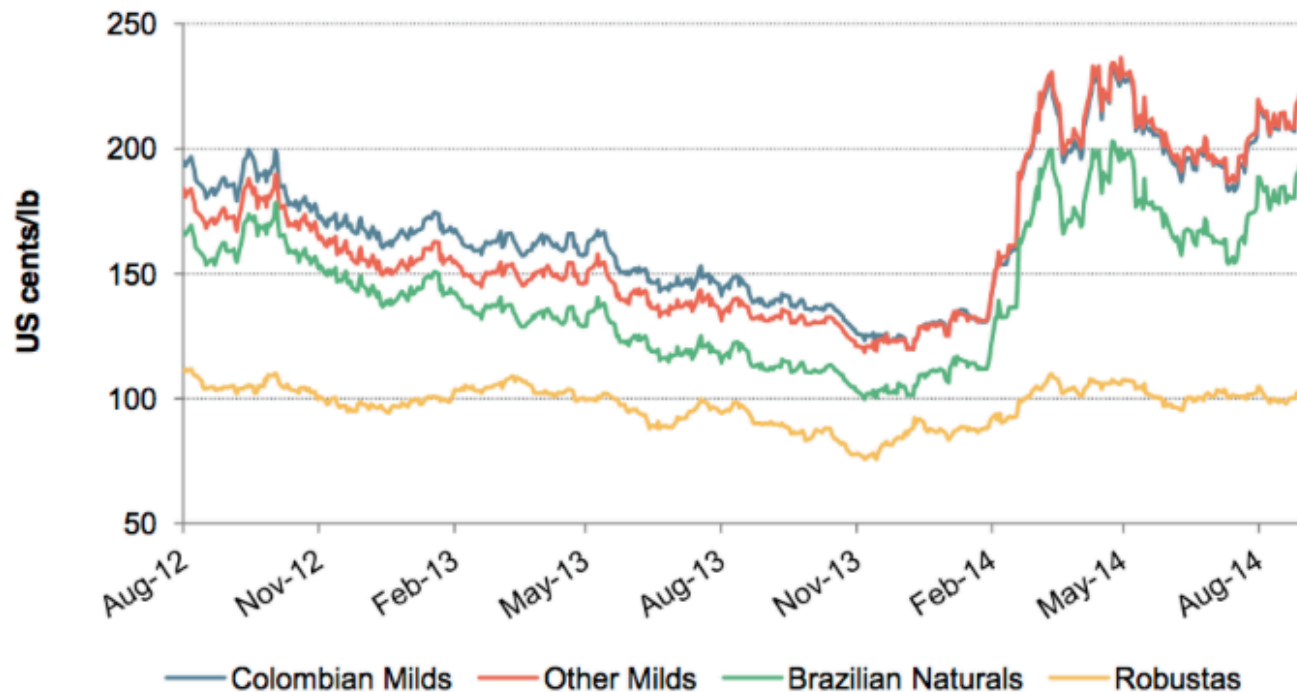
INTERNATIONAL
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August 2014

Prices fluctuated significantly during August, with the ICO composite indicator dropping by 10 cents

In terms of group indicators, the strongest increase was in Brazilian Naturals, up 11% to average 183.32 cents, reflecting the mounting concerns over supply. Colombian Milds and Other Milds both increased, by 9.0% and 8.2% respectively, recording their highest levels in three months. Robustas, on the other hand, fell by 1.5% to 100.25 cents, as most of the damage in Brazil is expected to affect the Arabica crop.

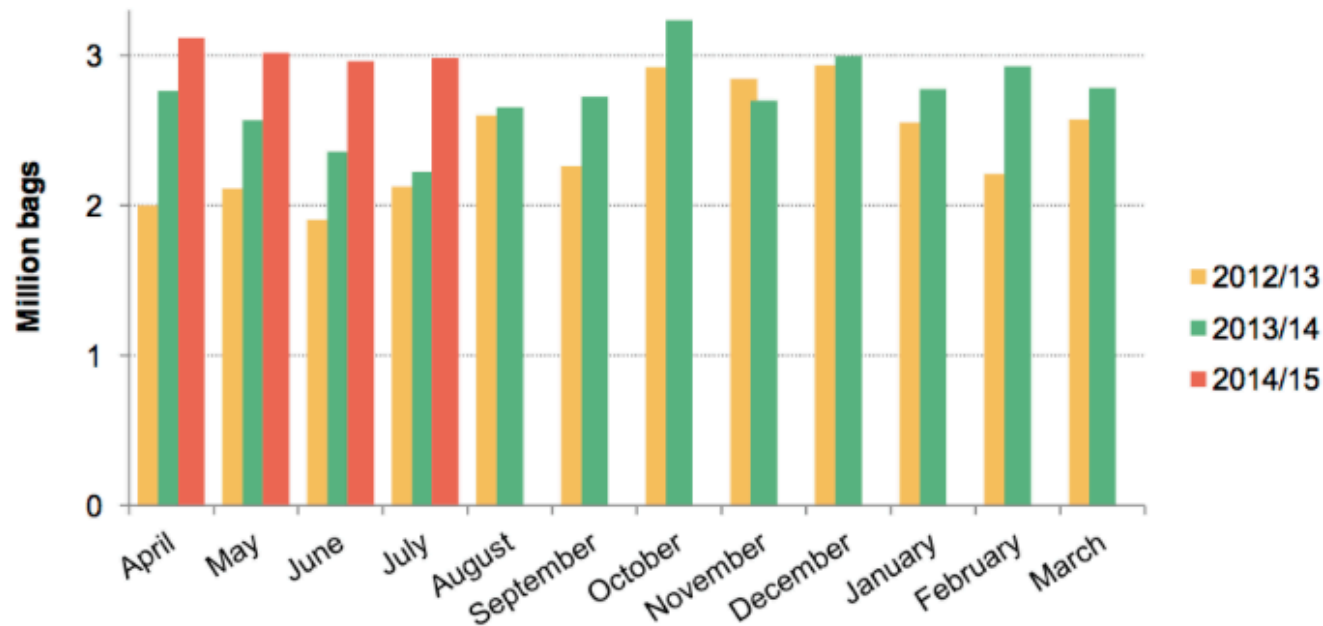
Graph 2: ICO group indicator daily prices



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As a result, the arbitrage between Arabica and Robusta prices has widened over the course of the month, with the daily price differential between the New York and London futures markets (2nd and 3rd positions) exceeding \$1 for the first time since May. The monthly price differential between the three

Graph 5: Exports by Brazil



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Furthermore, inventories in importing countries have built up significantly in recent months. Preliminary figures for inventories indicate they increased by 18% at the end of June 2014 compared to March, from 18.5 million bags to 21.8 million bags. Both the European Union and the USA recorded higher levels, suggesting a transfer of coffee from exporting countries to importing countries following heavy export flows.

Graph 6: Inventories in importing countries



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International Coffee Organization

The August 2014 #CoffeeMarketReport is out: Coffee Market Remains Volatile But Lacks Direction

Find it in English, French, Portuguese, and Spanish on our blog: <http://icocoffeeorg.tumblr.com/post/97212170755/august-2014-coffee-market-remains-volatile-but-lacks>

"Prices fluctuated significantly during August, with the ICO composite indicator dropping by 10 cents before jumping back up another 12 c...
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ICO Executive Director Visits Mexico - Calls for More Public Private

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Reviving the Coffee Sector in the Democratic Republic of the Congo



Photo: The manager and a member of the steering committee of the micro-washing station (MWS) of Maniyi proudly explaining the manual of procedures (also accessible to illiterate members).

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2 MONTHS AGO

Farewell to Brazilian Ambassador Marcos Pinta Gama



Ambassador Marcos Pinta Gama chats with Mr. Corneille Tabalo, Permanent Representative to the ICO for the Democratic Republic of the Congo, at a farewell reception held at ICO headquarters in honor of Amb. Pinta Gama

Robério Oliveira Silva is Executive Director of the International Coffee Organization.

On Tuesday 1 July, the International Coffee Organization (ICO), the International Cocoa Organization (ICCO), and the International Sugar Organization (ISO) hosted a reception to bid farewell to my dear friend, Ambassador Marcos Pinta Gama.

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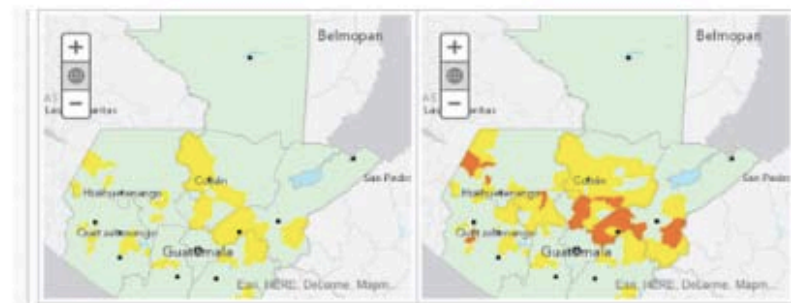


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What We're Reading: The Coming Crisis in the Coffeelands



In his latest blog post, Michael Sheridan of Catholic Relief Services asks, "If the FEWS NET projections are accurate, then we know that beginning next month smallholder coffee growers and coffee farmworkers are facing acute food security in Guatemala and need additional food aid in El Salvador. Are we ready?" [Read the blog post ►](#)



JUNE 6, 2014 (3:38 PM)



Mission Report: Participation in 2nd Forum on African Coffee Production and Consumption, Cameroon



ICO's Chief Economist, Mr. Denis Seudieu, attended the 2nd [Forum on African Coffee Production and Consumption \(FESTICOFFEE\)](#) on 29-31 May 2014 in Yaoundé, Cameroon, jointly organized by the Coffee and Cocoa Inter-Professional Council (CICC), which coordinates private sector activities in Cameroon, and the African and Malagasy Robusta Coffee Agency (ACRAM).

The Forum was preceded by a meeting of the [International Women's Coffee Alliance \(IWCA\)](#) that also organized a series of training sessions on coffee tasting for women. The theme of the 2nd FESTICOFFEE was "**Coffee: The Revival**", and it attracted over 300 visitors to the various stands of roasters, farmers' associations, research institutes and coffee authorities. The event focused on sustainable coffee production and consumption and included a scientific symposium on Robusta coffee, a coffee tasting day, and a coffee farmers' forum on how to produce sustainable coffee.



ICO's Head of Operations Attends the Hivos Sustainable Coffee Conference



On 3 July 2014, Mauricio Galindo, Head of Operations at the ICO, participated on a discussion panel at the the Sustainable Coffee Conference 'The heat is on', organised by Hivos in Amsterdam.

The event saw representatives from the private sector and NGOs come together to discuss sustainability in a sector facing serious challenges due to climate change. A new report that stimulates transparency on trends and sustainability developments in the coffee industry, the [Coffee Barometer](#), was also launched and discussed at the conference.

Read the excerpt below and find the [full summary of the conference from Hivos' staff at this link](#).

"Climate change puts coffee production under great strain: development organisations, private sector and certifiers are now feeling the urgent need to increase their collaboration..."

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ICO Executive Director Visits Mexico, Calls for More Public-Private Cooperation.

The Executive Director of the International Coffee Organization, Robério Oliveira Silva, travelled to Mexico in August 2014 at the invitation of Ms. Luz María Osuna, President of the Latin American Summit on Coffee, and Dr. Félix Martínez Cabrera, President of the National Association of the Coffee Industry (Anacafe México).

Mr. Silva was in Mexico to attend ANACAFE's annual meeting and participate

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News from the International Coffee Organization. August 2014.

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News from the International Coffee Organization

August 2014 (Public List Edition)

Welcome to the ICO's monthly newsletter. This month, you may notice our logo has a bit more color than usual. This is because we are celebrating the upcoming **4th Consultative Forum on Coffee Sector Finance**. Click the logo for more details and to register. Visit our website for regular updates and click on the links at the bottom of this page to follow us on social media.

Coffee

Market Report



Global Coffee Report

ICO's New Opinion Column



Robério Silva
Executive Director,
International Coffee Organization



SCIENCE STEPS FORWARDS

COFFEE PRODUCERS NEED PUBLIC-PRIVATE
INVESTMENTS TO PROTECT FROM DROUGHT
AND DISEASE

At the 112th session of the International Coffee Council in early March 2014, delegates from coffee producing and consuming nations discussed several major problems currently faced by farmers. In Central America, coffee farmers saw their trees ravaged by coffee leaf rust, a fungus that seemed almost impossible to contain. In Brazil, the worst drought in decades sparked fears that the supplier of a third of the world's coffee would face a serious deficit, driving prices up.

Although these individual events are not conclusive evidence of the detrimental effect of climate change, they are indicative of an ongoing trend where extreme climatic events are to be expected more often. Furthermore, in early April 2014, the Intergovernmental Panel on Climate Change (IPCC) released a report which predicted serious threats to coffee due to rising temperatures and changing rainfall patterns. Based on a thorough review of scientific studies on climate change from around the globe, the IPCC projected that coffee production, especially Arabica, would be significantly reduced by the spread of plant

2050. In Brazil, for example, a temperature rise of 3°C would cut the area suitable for coffee production by two-thirds in the states of Minas Gerais and São Paulo and eliminate it in others. In Kenya, regions which currently have an average growing suitability of 60 to 80 per cent would decrease to between 30 and 50 per cent.

These predictions require decisive action to secure our supplies of coffee and protect the livelihoods of millions of farming families around the world. It is time for the public and private sectors to step up and invest in robust scientific research and extension services for farmers.

COFFEE FARMERS ARE MOST AFFECTED BY CLIMATE CHANGE

At the ICO, we speak to the media, stakeholders, and others interested in the coffee sector about climate change and coffee prices on a weekly basis. Questions regarding the effects that climate change may have on retail prices for consumers always come up. While coffee lovers may not see a significant rise in the price of their cup of coffee in the short term, we should not underestimate the threat that climate change poses for prices in the long term. Climate change affects much more than just yields, it

sector that is increasingly interested in the sale of high-quality, differentiated coffees.

If we do nothing to mitigate the effects that climate change will have on coffee production, everyone along the supply chain will suffer – but farmers will be hit the hardest. It is the millions of smallholder, coffee-producing families who live in regions of the world with the lowest levels of access to agricultural services or protections whose livelihoods will be disrupted the most.

COFFEE NEEDS SCIENTIFIC RESEARCH AND EXTENSION

Most industrialised nations have systems of agricultural research and development that support their food industries. Governments, private companies, and foundations collaborate to invest in scientific research of major food crops to support the needs of farmers with disease-resistant crop varieties, innovations in farming implements, knowledge on efficient farming techniques, among other services.

An excellent example of this type of public-private partnership in agriculture is embodied in the innovations of the Green Revolution which continue to impact our world today. In the 1940s and 1950s, the Rockefeller and Ford Foundations funded work led by Nobel



Robério Oliveira Silva
Executive Director,
International Coffee Organization

LEADING THE WAY IN CLIMATE CHANGE MITIGATION:

THE CASE OF COSTA RICAN COFFEE COOPERATIVE COOPEDOTA

In the July/August 2014 edition of *GCR Magazine*, Robério Oliveira Silva, Executive Director of the International Coffee Organization (ICO), advocated for public-private partnerships to support climate change adaptation measures for coffee farmers. In this issue, we want to look at how hands on measures have been taken in Costa Rica to tackle the pervasive effects of greenhouse emissions in coffee production.

While we all recognise that providing coffee producers tools to adapt to a changing and increasingly extreme climate is essential, we should also consider what the global coffee industry (and the agricultural sector as a whole) can do to mitigate climate change. It is, after all, the other side of the coin and one that often gets neglected in view of the more urgent claims that adaptation imposes on coffee farmers worldwide. What can the coffee community do to reduce greenhouse gas (GHG) emissions from seed to cup?

Enter the case of the small Costa Rican coffee cooperative that could, Coopedota. Based in a region that *Lonely Planet* calls one of the world's top ten places to have a cup of coffee, Coopedota is a cooperative composed of 800 farmers. For the last two decades, the group has transformed its operations to produce

the world's first carbon-neutral coffee. Soon, they may make history in transforming Costa Rica by helping the country achieve its goal of becoming the world's first carbon neutral state by 2021.

COOPEDOTA'S HISTORY

The coffee cooperative from the Los Santos area of Costa Rica, Coopedota, was founded in 1960 by 96 coffee producers. Today, its 800 members produce approximately 50,000 60-kilogram bags per year, mostly for export to high-end markets in the United States, Europe, and Japan.

Hortensia Solís, former Sustainability Manager for Coopedota, says that the cooperative's leadership began exploring methods of changing and improving their operations to become carbon-neutral upon seeing the negative effects of unforeseen climatic events.

"Coopedota's efforts to reduce emissions started in 1998 when Costa Rica signed the Kyoto Protocol," says Solís, "But the damage caused by the changing climate in the last few years really compelled us to begin looking at community-level actions that could help our country and the global community fight and mitigate climate change."

In 2009, a drought – caused by the El Niño phenomenon – hit the region of Los Santos

causing early flowering and uneven maturing. As a result, coffee production in Costa Rica dropped by 15 per cent compared to the previous year. Then, in 2010, the Pirris River overflowed, destroying 80 per cent of the roads in the area, causing massive cracking and soil erosion in farms, and costing the municipality over US\$550,000 in repairs alone.

SETTING THE EXAMPLE AT A LOCAL LEVEL

Globally, the agricultural sector accounts for 24 per cent of GHG emissions. It is estimated that the world coffee industry accounts for 1 – 2 per cent of this number. However, in Costa Rica, as Coopedota learned, the coffee sector was contributing as much as 10 per cent of the country's total GHG emissions.

"Finding out that 40 per cent of total emissions in Costa Rica was coming from the agricultural sector and that such a significant portion of that was from the coffee industry really opened our eyes," says Solís.

Coopedota saw an opportunity to demonstrate that actions could take place at the community level to reduce carbon emissions and increase the efficiency of their operations. But they also saw an opportunity to tap into a market of environmentally-conscious consumers who would pay a premium for such coffee.

"In 2009, when we decided to go carbon-



"FINDING OUT THAT 40 PER CENT OF TOTAL EMISSIONS IN COSTA RICA WERE COMING FROM THE AGRICULTURAL SECTOR AND THAT SUCH A SIGNIFICANT PORTION OF THAT WAS FROM THE COFFEE INDUSTRY REALLY OPENED OUR EYES."

Hortensia Solis
Former Sustainability Manager, Coopedota

neutral, we worked with key stakeholders to coordinate and execute the plan," says Solis. "We began by reducing our processing plant energy consumption by 40 per cent."

The cooperative substituted 95 per cent of its firewood used in the drying process by utilising the brushwood and husks leftover from the harvest and post-harvest processes of the coffee cherries. An energy management program and the installation of a micro-mill for smaller batches helped reduce electric use by more than 50 per cent. Water use was reduced from 1 cubic metres per bushel to 0.2 cubic metres per bushel and discharges to the Parris River were completely eliminated.

"We didn't stop at the cooperative's headquarters. With the help of our farmers and community leaders, we began a composting and recycling programme. Today, over 70 per cent of the community's waste is recycled," says Solis.

The cooperative's efforts paid off in 2011 when they certified the first carbon-neutral coffee in the world, under the PAS2060 specification for demonstrating carbon neutrality of the British Standards Institution.

ENGAGEMENT IN INTERNATIONAL CLIMATE CHANGE AGREEMENTS
Encouraged by the success of their efforts



The Coopedota launched the very first carbon-neutral coffee in the world at press conference. From Right: Ronald Peter, Director of ICAFE; Andre Bourrouet, Former Vice-minister of Environment; Tania Lopez, Former Vice Minister of Agriculture; Rene Castro, Former Vice Minister of Environment; Xinia Chavez, Former Vice Minister of Agriculture; Hortensia Solis, Former Sustainability Manager at Coopedota.

and the recognition they received, Coopedota began engaging on climate change matters at an international level.

"We wanted to show that coffee could be a force for good in this global challenge," says Solis. "We wanted to show that farmers could do the things that the politicians at the international level were finding so difficult."

In 2011, Hortensia and Coopedota gathered a national coalition to brainstorm ways to create a Nationally Appropriate Mitigation Action (NAMA) proposal for the Costa Rican coffee industry. Under the Copenhagen agreement, NAMA proposals are a set of policies and actions undertaken by countries to reduce GHGs which can receive funding for implementation, if successful.

The group that was formed included representatives from the Costa Rican Ministry of Agriculture, Ministry of Environment, Institute of Coffee, and a local climate change non-governmental organization called CO2.cr. They were aiming high.

"To start, we wanted to reduce emissions in the Costa Rican coffee industry by 15 per cent and help 100 coffee farms go carbon-neutral by 2015," says Solis. "Ultimately, we thought that if we could do this in Costa Rica,

the rest of the world would follow."

"It took a lot of work, but we believed that it has been worth the efforts," she adds. "We needed to get lots of people on board with the idea and to make sure that we had key actors involved or else the NAMA would never receive funding."

"Over the last year, the Costa Rican coffee industry received funding from the United Nations' NAMA facility for a pilot project. From a humble start in Coopedota, Costa Rica is now leading the way towards making the best coffee for the world," says Solis.

Today, as we prepare for the upcoming 'Climate Change: Time for Action' workshop during the 113th Session of the International Coffee Council in September, Hortensia and CO2.cr are working closely with us at ICO on developing a strategy to help our Member Countries plan and execute their own NAMAs. It may take time and much effort, but examples like Coopedota's show us that it is possible (and necessary) to bring civil society and the public and private sectors together to enable meaningful actions to mitigate climate change. Let us learn from this group of entrepreneurial farmers to engage for the future of the coffee industry and for the future of our planet. **Q&A**



Medium-Term Objectives

- Internal communications improved
- Website redesign



Questions & Comments?

Vicente Partida

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