



INTERNATIONAL
COFFEE
ORGANIZATION



Annual Review
2013 - 2014

Strengthening the global
coffee sector through
international cooperation

Our Mission

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. It makes a practical contribution to the development of a sustainable world coffee sector and to reducing poverty in developing countries by:

- Promoting international cooperation on coffee matters;
- Providing a forum for consultations on coffee matters among governments, and with the private sector;
- Encouraging Members to develop a sustainable coffee sector in economic, social and environmental terms;
- Providing a forum for consultations seeking understanding with regard to the structural conditions in international markets and long-term trends in production and consumption that balance supply and demand, and result in prices fair both to consumers and to producers;
- Facilitating the expansion and transparency of international trade in all types and forms of coffee, and promoting the elimination of trade barriers;
- Collecting, disseminating and publishing economic, technical and scientific information, statistics and studies, as well as the results of research and development in coffee matters;
- Promoting the development of consumption and markets for all types and forms of coffee, including in coffee producing countries;
- Developing, evaluating and seeking finance for projects that benefit Members and the world coffee economy;
- Promoting coffee quality with a view to enhancing consumer satisfaction and benefits to producers;
- Encouraging Members to develop appropriate food safety procedures in the coffee sector;
- Promoting training and information programmes designed to assist the transfer to Members of technology relevant to coffee;
- Encouraging Members to develop and implement strategies to enhance the capacity of local communities and small-scale farmers to benefit from coffee production, which can contribute to poverty alleviation; and
- Facilitating the availability of information on financial tools and services that can assist coffee producers, including access to credit and approaches to managing risk.

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Foreword



Jawaid Akhtar
Chairman of the Council

Coming from a country where coffee has become increasingly popular over the last few years, it was an honour to chair the International Coffee Council during coffee year 2013/14. The year was marked by a number of achievements.

The 4th Consultative Forum on Coffee Sector Finance was held successfully with the valuable participation of multilateral institutions and many stakeholders to discuss ways to support coffee producers in terms of price risk management and access to finance. I would like to express my deep appreciation to the Chairman of the Forum, Juan Esteban Orduz, for his excellent work in bringing together a large number of prominent financial institutions and other stakeholders to participate in the Forum.

An important achievement was an active participation of the International Women's Coffee Alliance in the debates of the Organization. This represents a wake-up call to remind the coffee sector of the recognition of the role of women in the economy and the need to support their efforts.

During my tenure as Chairman, the subject of sustainable coffee has been included in the core of the debates and a successful seminar on 'Achieving Sustainable Supply in the Coffee Market' was held in March 2014. However, noting the disparities in the share of producers in the coffee value chain, the topic of sustainable coffee should be given further consideration in the future activities of the Organization.

Another important issue discussed during my tenure was the engagement of young people in coffee farming and the need to address the issue of an ageing farming population in order to maintain the sustainability of the industry in producing countries.

With regard to the performance of the coffee market, we witnessed that the volatility of prices was exacerbated by drought in many producing areas in Brazil. The depreciation of currencies against a strong dollar in a number of exporting countries, including Brazil, Indonesia and India, has led to a substantial increase in coffee exports.

I also note the efforts made by the Central American region to control the outbreak of coffee leaf rust and I invite donors to provide relevant financial support to coffee farmers affected by its highly negative impact on the sector.

I also welcome the full membership of the Plurinational State of Bolivia, which completed the procedures to join the Organization. I would like to call on the Executive Director to continue his efforts to increase the membership of the Organization.

Whilst we are pleased with our achievements, we should be aware of a number of pressing challenges for the coffee industry. Access to finance continues to be a serious impediment to the progress of the sector in a number of producing countries. As mentioned above, I recognize the efforts being made by the Consultative Forum on Coffee Sector Finance to raise the awareness of various financial and development institutions.

There are new challenges arising in the area of coffee development projects due to the fact that the Common Fund for Commodities has changed its financing policies. The role of the Secretariat will need to be enhanced to make use of its expertise in project design and in the area of fundraising. Another major challenge is compliance with statistics since accurate data are required to be able to guide the coffee industry efficiently. I urge all countries to provide this information to the ICO.

We should all be prepared to participate actively at the forthcoming events of the ICO. Italy will host the 1st Global Coffee Forum at the time of Expo Milan 2015 and the first International Coffee Day will be launched on 1 October 2015. The next event thereafter will be the 4th World Coffee Conference, which will take place in Addis Ababa, Ethiopia in 2016. The Conference will be an important tool to strengthen the role of the Organization as a forum on coffee related issues.

In conclusion, I would like to thank all of you for having facilitated my work as Chairman of the Council through your deliberations and advice. I would like to offer my congratulations and unconditional support to Conradin Rasi of Switzerland as the new Chairman of the Council for coffee year 2014/15. I am sure that his abilities and experience will contribute to a successful term of office in carrying out his functions. Finally, I thank the Executive Director and the Secretariat for their proactivity and dedication to the work of the Organization. I am convinced that the cooperative efforts of all the Members of our Organization will continue to address the many challenges in the coffee sector successfully. We cannot change the direction of the wind, but we can adjust the sails.

Jawaid Akhtar

Chairman of the International Coffee Council 2013/14
Chairman of the Coffee Board of India

Overview



Robério Oliveira Silva
Executive Director

During the last few years the ICO has taken on a completely new role. We have been hosting Seminars on topics such as new consuming markets, certification and the most recent one was on the balance in Achieving Sustainable Supply in the Coffee Market which was attended by leading experts in the industry and participants from many areas of the coffee sector including roasters, traders, brokers and analysts.

We held the 4th Consultative Forum on Coffee Sector Finance in September 2014. The main goal of the Forum was to discuss the challenges faced by coffee farmers, such as poverty, underdevelopment and difficulty in accessing finance. Participants heard from representatives of several multilateral and bilateral institutions in addition to social and sustainable lenders.

In order to make the Forum as interactive as possible there were opportunities not only for exporters and importers to ask the panel questions in the plenary sessions but also to network and hold individual discussions. This allowed delegates to gather information specific to the needs of their countries. Following the success of this event we are now preparing for the 5th Consultative Forum, which will promote an exchange of views on 'How to effectively structure a project in order to obtain financing'.

Another important development was the endorsement by the ICO Council in March 2014 of a quarterly Statistics Roundtable, made up of the ICO Statistics team and experts from across the coffee sector. It gives experts in the coffee industry the opportunity to engage with the ICO and share their views on the coffee market. This is allowing us to meet the needs of the market by enhancing our statistical capacity.

We continue to work on the impact of climate change on coffee production. Christiana Figueres, the Executive Secretary of the United Nations Framework Convention on Climate Change (UNFCCC), recognizing the important work of the ICO in this area, recorded a message addressed to ICO Members. She praised the ICO for taking early action on this matter but emphasized the need for both the private and the public sector in all countries to develop their mitigation and adaptation strategies.

In the last year we have refreshed and modernized our communication strategy. This has included the launch of a newsletter which is sent out to Members, non-members and other interested parties. We have also launched an ICO Blog and extended our presence on social media. Finally, we are working on the design of a new website, intended to help visitors access ICO information more easily. We hope that all these initiatives will increase the ICO's visibility, provoke conversations and debate, and confirm the ICO as the leading source of information for the coffee sector.

The 1st Global Coffee Forum and the launch of the first International Coffee Day will be held in October 2015 to coincide with EXPO Milan, which will include a cluster on the theme of coffee. The Global Coffee Forum will take place over two days with events concentrated around the "pillars" of pleasure, health and sustainability.

Throughout the year, the ICO has been represented at numerous events, including the 2nd International Ethiopian Coffee Conference, the 1st African Coffee Symposium and the 53rd General Assembly of IACO, the World Coffee Leaders' Forum and the Café Show in the Republic of Korea, the 5th India International Coffee Festival, the 1st Conference for Women in the World of Coffee in Italy and the 2014 Latin American Summit on Coffee.

Finally, I would like to acknowledge the hard work of the Chairmen of the ICO Advisory and Consultative bodies. I would like to pay tribute to Shri Jawaid Akhtar, whose work as the Chairman of the International Coffee Council in 2013/14 was exceptional. Last but not least I would also like to pay tribute to my staff who continue to do a tremendous job.

Robério Oliveira Silva
Executive Director
International Coffee Organization

The World Coffee Market

Prices

After declining almost continuously in 2011/12 and 2012/13, coffee prices recovered strongly in 2013/14. Early in the year, Brazil suffered one of its worst droughts on record, leading the ICO composite to jump from under US\$1/lb in mid-November 2013 to a high of 178.96 cents in April 2014.

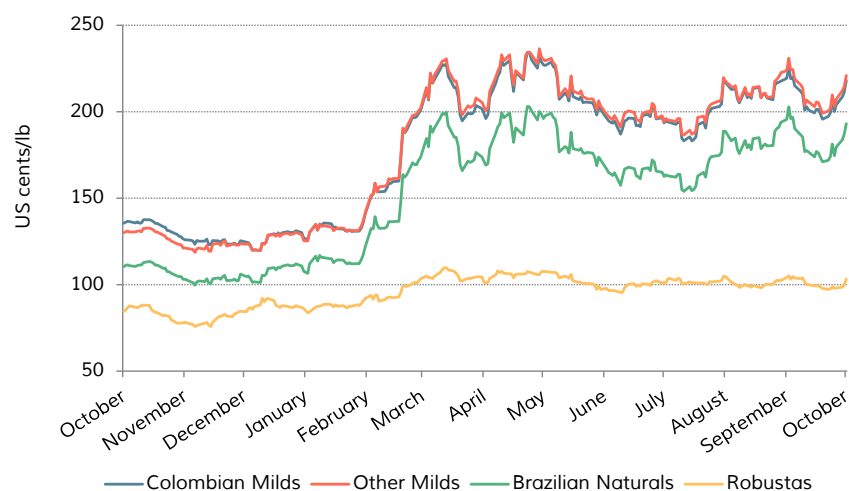
In the second half of the year, the ICO composite indicator stayed in the 140 to 180 cents range with no clear trend. However, these six months were characterized by significant volatility, particularly in the Brazilian Naturals group indicator. For the year as a whole, the ICO composite averaged 141 cents/lb, 10.3% higher than the 2012/13 average.

Graph 1: ICO composite indicator daily prices (Coffee year 2013/14)



The three Arabica groups (Colombian Milds, Other Milds and Brazilian Naturals) were all significantly higher than the previous year, up 12.4%, 20.7% and 14.8% respectively, but Robustas averaged 2.3% lower. Furthermore, the monthly average of the Other Milds indicator traded at a premium above Colombian Milds between February and September, reflecting the difference in availability of the two groups over the course of the year. This is the first time that the annual average of Other Milds has exceeded that of Colombian Milds since 1988/89.

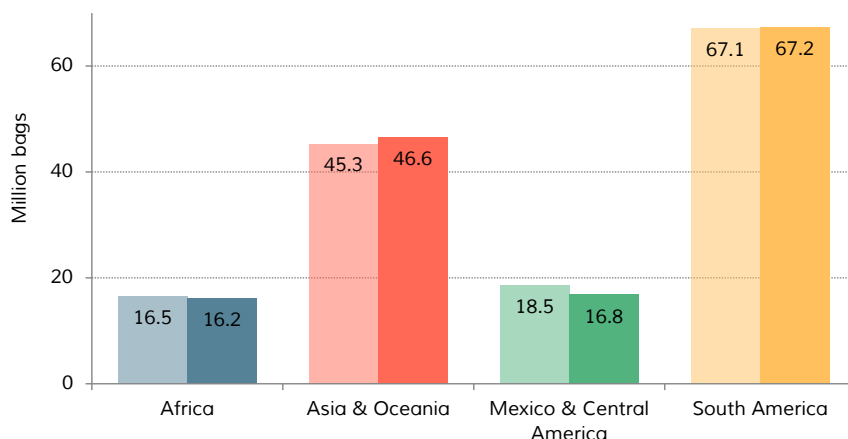
Graph 2: ICO group indicator daily prices (Coffee year 2013/14)



Supply

Total coffee production in 2013/14 was estimated at 146.8 million 60kg bags, very slightly down on the 147.5 million bags produced in 2012/13. The drought in Brazil came after its 2013/14 harvest had ended, but will have a significant impact on production in 2014/15 and 2015/16.

Graph 3: Coffee production by continent (2012/13 and 2013/14)



Production in **Africa** fell slightly to 16.2 million bags, or 11% of the world total. Ethiopia is the largest producer in the region, on 6.5 million bags, followed by Uganda (3.7 million) and Côte d'Ivoire (1.9 million). Tanzania was in the off year of its biennial cycle, so production was lower on nearly 800,000 bags, while Kenya was relatively unchanged on 863,000 bags. Africa produced 9.2 million bags of Arabica coffee compared to 7 million of Robusta in 2013/14.

Asia and Oceania accounts for nearly one third of world coffee production, on 46.6 million bags, up from 45.3 million in 2012/13. Vietnam, the second largest producer in the world, saw output increase by an estimated 10% to 27.5 million, which would represent its highest crop on record. Production in Indonesia was 11% lower on 11.7 million, while India was mostly unchanged on 5.1 million. Overall, Asia and Oceania was responsible for two thirds of the world's Robusta production in 2013/14, compared to 8% of Arabica.

In **Central America**, production was badly affected by the outbreak of coffee leaf rust, which drove output down to 16.8 million bags, 99% of which was Arabica, compared to 18.5 million in 2012/13 and 20.2 million in 2011/12, before the rust outbreak. Almost every country in the region has suffered production disruption over the last two years, although some signs of recovery are starting to emerge. The largest producer in the region is Honduras, where output was up 1% to 4.6 million, but down from 5.9 million two years previously. **Mexico** was 9.5% lower on 3.9 million and Guatemala down 16% on 3.2 million. Nicaragua is starting to recover, up 7% on 2 million bags, but Costa Rica is down 10% on 1.4 million, and El Salvador has been particularly badly affected, down by 45% to 742,000 bags. Overall, coffee leaf rust in Central America cost the region an estimated US\$245.9 million in 2013/14, in addition to US\$369.3 million in 2012/13.

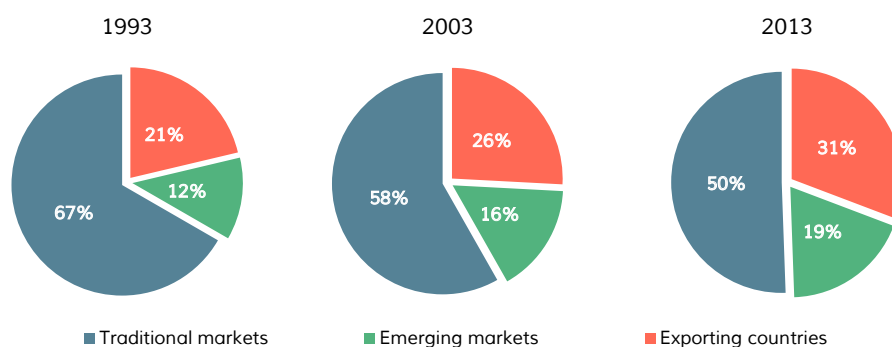
Finally, in **South America**, production was mostly unchanged on 67.2 million bags, or 46% of the world total. Brazil saw a 3% decrease to 49.2 million bags, a record for an off year crop in the biennial cycle. Colombia has been recovering strongly after several years of below-average production, up by 22% in 2013/14 to 12.1 million bags. Peru, however, has also been affected by coffee leaf rust, and is down 3% on 4.3 million bags. Production in South America is 81% Arabica and 19% Robusta.

Demand

Total demand in calendar year 2013 is estimated at 146.1 million bags, and has been growing at around 2.1% per annum for the last four years. This growth has mostly been driven by increased demand in exporting countries and new consuming countries, which have registered average annual growth rates of 3.1% and 2.7% respectively since 2010.

Particularly strong growth has been observed in East and Southeast Asia, such as Indonesia, Vietnam and South Korea. Traditional consuming markets have registered more modest growth rates of around 1.3% per annum. Coffee demand in the European Union has stagnated somewhat recently, although consumption in the USA has shown something of a resurgence. Traditional consuming markets account for over 50% of the world total, but this percentage share is diminishing, and the strongest potential for further growth can be found in emerging markets.

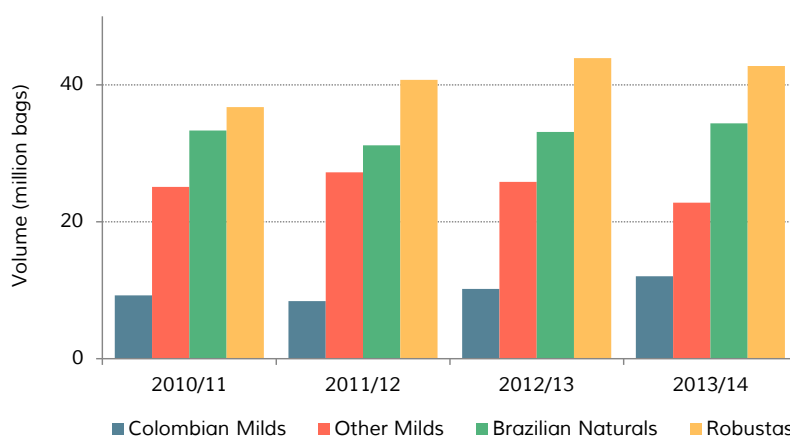
Graph 4: Composition of world consumption (Calendar years 1993 - 2013)



International trade

Total exports in coffee year 2013/14 amounted to 111.8 million bags, 1.1% less than last year but still the second-highest volume on record. Arabica exports were essentially unchanged on 69.1 million bags, with increased shipments of Colombian Milds and Brazilian Naturals compensating for the decreased availability of Other Milds from Central America.

Graph 5: Volume of coffee exports by group (2010/11 - 2013/14)



Exports of Robusta were 2.8% lower on 42.7 million, despite a 12.4% increase from Vietnam; this is due to the significant drop in exports from Indonesia, which were half their level of 2012/13.

In terms of value, these exports accrued estimated earnings of US\$18.4 billion to exporting countries, 4.5% less than 2012/13, and the lowest value in the last four years. The volume of re-exports by importing countries, on the other hand, was higher on 43.2 million bags.

Finally, coffee stocks and inventories were mostly higher in 2013/14. Stocks in producing countries increased from 21.3 million to 22.6 million bags at the end of the crop year, due to strong production levels in Brazil and Vietnam. Importing countries also replenished their coffee inventories, up to 23.3 million bags by September 2014, from 21 million in September 2013.

Prospects

2013/14 was another year of high production levels, just 700,000 bags less than the record volume produced in 2012/13. However, prospects for 2014/15 are not so good, given the damage from the drought in Brazil and lower output in Indonesia. Colombia is rebounding strongly, and many countries in Central America are showing more modest signs of recovery, but this will probably not offset the deficit expected in 2014/15. As a result, stocks in both importing and exporting countries have been built up over the last year, but these are expected to be drawn down in order to supply the market. Consumption continues to grow at around 2 to 2.5% per year, and this trend is expected to continue in the near future.





4th Consultative Forum on Coffee Sector Finance

The 4th Consultative Forum on Coffee Sector Finance took place in London on 23 September 2014, on the theme of 'Bridging the Gap Between Farmers and Finance'. For the first time, representatives of 22 multilateral, bilateral and social lenders, along with delegates from coffee-producing countries, gathered together to discuss the provision of finance in the coffee sector.

The primary objective of the event was to "discuss and implement concrete plans for poverty alleviation and wealth creation in rural communities which depend on coffee production", according to Juan Esteban Orduz, President and CEO of the Colombian Coffee Federation Inc. and Chairman of the Forum.

The 4th Forum was divided into three panels: the first included representatives of multilateral financial institutions, including the World Bank, the Asian Development Bank, the Common Fund for Commodities and the Inter-American Development Bank who discussed how countries can access their finance channels, and giving examples of previous such projects.

The second panel was composed of bilateral donors (from Germany, Italy, the Netherlands, Spain and the USA) who focused on the role of public and private institutions in the coffee sector, and how to facilitate financial and technical assistance.

Finally, the third panel focused on social and sustainable funding, including IDH, the Neumann Foundation, Rabobank, ResponsAbility, Shared Interest, Triodos, and FAST, and moderated by Progreso Foundation.

There was also specific time during the day devoted to networking and individual discussions, to allow delegates from coffee-producing countries to discuss their goals and priorities with the financial institutions.

In addition, the World Bank gave an overview of a study put together in collaboration with the ICO, on the subject of risk and finance in the coffee sector. It sought to answer the question: how can finance provision be improved? The study contains a unique compendium of 21 case studies on risk management provision from different coffee-producing countries and institutions, which will be published in 2014/15.



Juan Esteban Orduz
Chairman of the Forum

Participants agreed that the 5th session of the Forum will be organized as a follow-up to the 4th Forum. It will promote an exchange of views on 'How to effectively structure a project in order to obtain financing'.

More on the Web

All presentations and documents from the 4th Forum can be found on the ICO website at <http://www.ico.org/forum4-e.asp>, including videos of the event, which was broadcast live online for the first time.

International Coffee Agreement 2007

The International Coffee Agreement (ICA) 2007, the seventh Agreement since 1962, entered into force on 2 February 2011 and will last for ten years, with the possibility of extension for a further eight years. The objective of the Agreement 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 sector. The world coffee trade is important for exporting as well as importing countries, generating export earnings of around US\$17.9 billion in calendar year 2013 for producing countries while over 600 billion cups are consumed every year throughout the world.



Roberto Calzadilla, Ambassador of Bolivia, and the Executive Director

On 22 September 2014 the ICO welcomed the ratification of the ICA 2007 by the Plurinational State of Bolivia who was applying the Agreement provisionally. This was followed by the deposit of an instrument of ratification by the Government of Madagascar on 26 November 2014. As at 31 December 2014, the ICO had 46 Member Governments compared to 45 in the previous coffee year. Taking into account the European Union with 28 member States, a total of 73 countries are represented under the 2007 Agreement. A further four countries have signed the 2007 Agreement and are finalizing internal procedures for membership, namely, Benin, Democratic Republic of Congo, Guinea and Nigeria.

At its 113th Session in September 2014, the International Coffee Council adopted Resolution 454 extending the deadline for the deposit of instruments of ratification, acceptance, approval or accession to 30 September 2015.

The Executive Director undertook two overseas missions to the Republic of Korea and Japan and is in contact with the China Coffee Association about a mission to discuss membership. Lao People's Democratic Republic has confirmed its intention to become a Member in 2015 and the Russian Federation, Nepal and Sri Lanka have advised the ICO that they are taking steps to become Members. All these countries have sent delegations to attend the Council Sessions as observers.

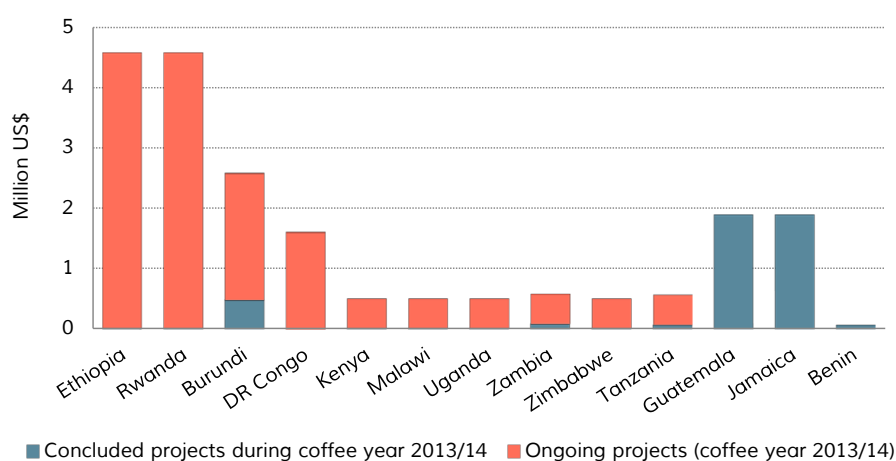
Coffee Development Projects

Introduction

Coffee sector development projects are an example of an area of the Organization's work specifically aimed at addressing world coffee problems and to promote a sustainable world coffee economy.

With the concessionary financing facilities provided by the Common Fund for Commodities (CFC), set up by the United Nations Integrated Programme for Commodities, the Organization has sponsored 38 coffee development projects implemented mainly in Africa, Asia and Latin America over the last 19 years.

Graph: Project beneficiaries in coffee year 2013/14



New Developments of Project Financing by the CFC and Challenges to the Organization

Since 1995, as the designated International Commodity Body (ICB) for coffee, the ICO has identified, reformulated, submitted and supervised coffee development projects which have been financed mainly by the CFC largely through grants. However, the CFC has adopted one major change with serious consequences affecting the work of ICBs, namely the switch from financing through grants to repayable loans for projects that can generate profits.

Members have been informed and discussions are under way to adapt to the new challenges, including the change for the ICO Secretariat from acting as a clearing house for approving projects to building relationships with funding institutions, facilitating access to donors and directing projects to appropriate institutions. As the Organization remains the focal point of expertise for coffee related projects, the ICO has been requested to enhance its involvement in project design and fund raising activity.

Ongoing Projects

Democratic Republic of Congo • CFC/ICO/51

Total cost: US\$1,611,447 • CFC grant: US\$1,368,990 • Counterpart contribution: US\$242,457

Qualitative and quantitative rehabilitation of coffee with the aim of improving living conditions of coffee farmers afflicted and displaced by war. The aim of this project is to rehabilitate the coffee sector through the creation of centres for propagation and distribution, the establishment of extension and support teams and making available to farmers high performance plant cuttings, essential inputs and appropriate guidance.

Ethiopia & Rwanda • CFC/ICO/48

Total cost: US\$8,147,494 • CFC grant: US\$1,240,270 • CFC loan/guarantee: US\$2,000,000
Co-financing: Rabobank Foundation (grant): US\$325,874 • Rabobank & local banks loans: US\$4,250,000 • Counterpart contribution: Ethiopia: US\$166,425 • Rwanda: US\$164,925

Sustainable Credit Guarantee Scheme to promote scaling up of enhanced processing practices. This project proposal is designed to improve livelihoods of small-scale coffee farmers in Eastern and Central Africa on a sustainable basis. This will be achieved by promoting the production of high quality coffee, through the adoption of enhanced coffee processing practices. The high quality coffees will subsequently attract premium prices in the market thereby translating into improved household income.

AFCA Countries • CFC/ICO/45

Total cost: US\$4,495,725 • CFC grant: US\$2,000,000 • EU co-financing: US\$1,500,000 (grant)
Counterpart contribution by nine countries: US\$995,725

Building capacity in coffee certification and verification for specialty coffee farmers in AFCA countries. The overall goal of the project is to improve the skills of farmers to meet certification and verification standards. The project also aims to train professionals from national coffee institutions in order to continue farmer training programmes to ensure a sustainable impact.

Burundi

Total cost: US\$9,400,000 • Committed funding by donors and private sector: US\$1,600,000

Promoting a sustainable coffee sector through the improvement of productivity and production of high quality coffee and food crops to improve the livelihoods of coffee producers, in partnership with SUCAFINA SA. Following the launching of the project in October 2012 in Geneva, a non-for-profit organization, the Kahawatu Foundation was set up to start its implementation with the first committed funds while continuing to raise additional funding to cover all project activities.

Concluded Projects

Guatemala & Jamaica • CFC/ICO/46

Total cost: US\$3,750,000 • CFC grant: US\$1,500,000 • Co-financing: US\$1,000,000 • Counterpart contribution: Guatemala: US\$1,000,000 • Jamaica: US\$250,000

Competitive Coffee Enterprises programme to strengthen the coffee sectors in Guatemala and Jamaica based on six components: 1) Sustainable development; 2) Income diversification; 3) Marketing intelligence; 4) Marketing; 5) Funding; and 6) Institutional strengthening.



East Africa • CFC/ICO/53/FT

Total cost: US\$120,000 • CFC grant: US\$120,000

The aim of the project was to facilitate access to finance for developing country Small and Medium Enterprises (SMEs) producing commodities in accordance with internationally recognized practices for sustainable production. The project has developed the core elements of a generic, publicly accessible, financial literacy toolbox and applied the toolbox through a series of training workshops with technical assistance providers and SMEs in the East African region.



Global • CFC/ICO/49FA

Total cost: US\$532,250 • CFC grant: US\$429,250 • Co-financing from UN LDC IV, UN OHRLLS, UNCTAD Trust Fund: US\$103,000

An examination and analysis of the impact of the economic crisis on LDCs with a view to proposing policy responses for recovery and measures to insulate/reduce impact of such crisis on their economies in future. In particular, it was expected to look into the vulnerability of commodity dependent LDCs resulting from their large exposure to external markets, limited diversification and poor capital base. This vulnerability is particularly important in the context of the volatility of the global markets, exemplified by the current economic and financial crisis.



Burundi • CFC/ICO/52/FT

Total cost: US\$392,825 • CFC grant: US\$98,175 • Co-financing: US\$220,000 (Revolving Fund from previous project) • Counterpart contribution: US\$74,650

The central objective of the Fast-Track project was to consolidate income and food security through the promotion of environmentally friendly farming practices under the existing credit revolving fund. The project also assisted in strengthening extension services with Good Agricultural Practices using livestock waste as fertilizer for food and coffee production. It has also contributed to the improvement of farmers' capacity in credit and savings management.





Sustainability & Partnerships

A sustainable coffee supply chain is at the core of the work of the International Coffee Organization. The fact remains that a large number of coffee growers struggle to make ends meet, in spite of relatively high prices for green coffee beans in the international market over the past six months. Many factors conspire against farmers, but amongst the most pressing we can quote inadequate access to finance, lack of instruments for managing price volatility, insufficient technical support to combat pests and diseases and increase productivity, and poor understanding of how to access the most profitable markets.

The large scale social change required to address these issues will require broad cross-sector coordination, currently known as collective impact. This means the commitment of a group of important actors from different fronts within a sector to a common agenda for solving a specific social problem. The full force of collective impact comes from its structured process that sets a common agenda, shared measurements, continuous communication, and mutually reinforcing activities among all participants.

It is in this spirit that the ICO has begun working together with several development agencies, building on the belief that the coffee sector can pioneer new way of working together for a better future for coffee farming. Key opportunities have been identified along the following lines:

- Putting in place a truly innovative and participatory model for effective partnership and collaboration between governments in coffee producing countries, the private sector, and civil society aiming at farmers' benefits and solutions to systemic sustainability issues through joint agenda identification. At the very core of the initiative is its farmer centric approach.
- Securing more and better aligned funds and investments for coffee by donors, funders, banks, investors guided by nationally developed and defined coffee strategies between public and private coffee stakeholders.
- Promoting an aligned vision and contribution to sustainable coffee farming from supply chain interventions.

Observer organizations represented at ICO meetings during the year included the Asian Development Bank (ADB), CABI, Common Fund for Commodities (CFC), Inter-American Development Bank (IDB), InterAfrican Coffee Organisation (IACO), International Cocoa Organization (ICCO), International Finance Corporation (IFC), International Sugar Organization (ISO), International Trade Centre (ITC), International Women's Coffee Alliance (IWCA), and the World Bank.



Missions

The Executive Director and senior ICO officials represented the ICO and made presentations on the world coffee market and related topics at a wide range of global coffee events in 2013/14 including:

Japanese National Coffee Day Tokyo, Japan (29 September to 5 October 2014)

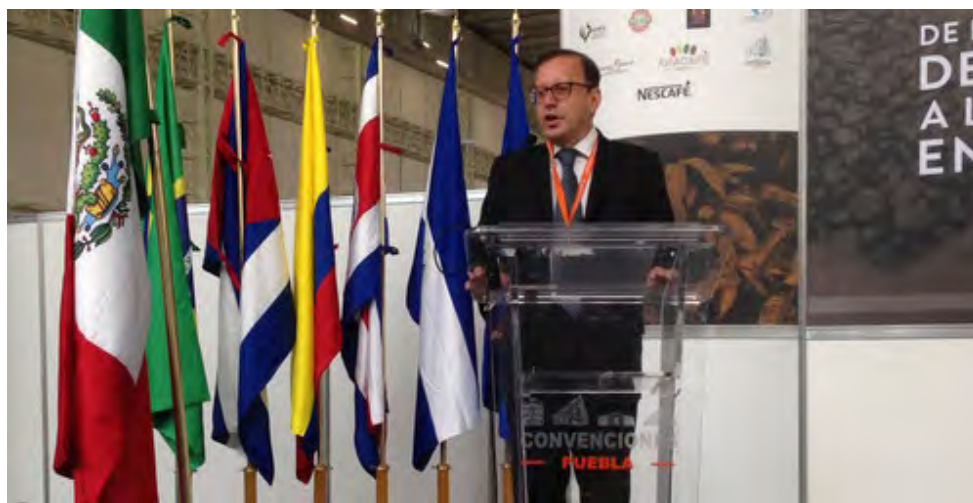


The Executive Director meets the Parliamentary Vice-Minister for Foreign Affairs of Japan, Kentaro Sonoura

The Executive Director visited Japan at the invitation of the All Japan Coffee Association (AJCA) to celebrate the Japanese National Coffee Day. He met the Minister for Foreign Affairs, Fumio Kishida, the Parliamentary Vice-Minister for Foreign Affairs, Kentaro Sonoura and the Parliamentary Vice-Minister for Agriculture, Forestry and Fisheries of Japan, Yuko Nakagawa. In his conversation with the officials, the Executive Director stressed the importance of Japan, the fourth largest coffee consuming country, rejoining the International Coffee Organization.

ANACAFÉ's Annual Meeting and the 2014 Latin American Summit on Coffee

Puebla, Mexico (21 to 24 August 2014)



The Executive Director speaking at the 2014 Latin American Summit on Coffee in Mexico

The Executive Director was invited to attend the Annual Meeting of the National Association of the Coffee Industry (ANACAFÉ) in Mexico and to participate at the 2014 Latin American Summit on Coffee. At the summit, the Executive Director spoke about the need for balance in the global coffee trade and encouraged producers, retailers, and exporters to consider the growing opportunities in growing markets around the globe.

Hivos Sustainable Coffee Conference

Amsterdam, The Netherlands (3 July 2014)



The Head of Operations at the Sustainable Coffee Conference 'The Heat is on', in The Netherlands

The Head of Operations participated on a discussion panel at the Sustainable Coffee Conference 'The Heat is on', organized 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.

Abocol's First International Meeting on Coffee Productivity Pereira, Colombia (11 September 2014)



The Head of Operations participated in Abocol's First International Meeting on Coffee Productivity. The event was attended by Colombian coffee producers and others in the industry. The aim of the event was to provide tools to Colombian coffee growers to boost their productivity and competitiveness in the global market.

2nd Forum on African Coffee Production and Consumption Yaounde, Cameroon (26 to 30 May 2014)



The Chief Economist was invited to attend the 2nd Forum on African Coffee Production and Consumption jointly organized by the Coffee and Cocoa Inter-professional Council (CICC), a body in charge of the coordination of the 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 by women.

Meeting at United Nations Framework Convention on Climate Change (UNFCCC)

Bonn, Germany (September 2014)

The Head of Operations met Christiana Figueres, Executive Secretary of the UNFCCC, to discuss the challenges coffee farmers are facing with a changing global climate. He reiterated the ICO's commitment to work with bodies like the UNFCCC to develop and implement policies that help coffee farmers adapt to climate change. Christiana Figueres made a video with an address to ICO Members which is available on the ICO website.

Ernesto Illy Foundation's 1st Conference for Women in the World of Coffee

Trieste, Italy (27 and 28 March 2014)

The Head of Operations was the moderator at the 1st Conference for Women in the World of Coffee at the Ernesto Illy Foundation. The theme of the Conference was "Fostering the 'Quiet Revolution' Through Education and Access," and covered a variety of topics affecting women along the entire coffee value chain.

11th African Fine Coffee Conference and Exhibition

Bujumbura, Burundi (13 to 15 February 2014)

The Executive Director delivered a keynote speech at the official opening ceremony of the 11th African Fine Coffee Conference and Exhibition in Bujumbura, Burundi. The event was attended by the President of the Republic of Burundi, Pierre Nkurunziza. In his speech, the Executive Director spoke of the environmental, social, and economic aspects of sustainable coffee production.

5th India International Coffee Festival (IICF 2014)

Bangalore, India (21 to 25 January 2014)

The Executive Director gave a speech at the 5th India International Coffee Festival (IICF 2014). The theme of the festival was 'Changing the Face of Coffee'.

LXXIX National Coffee Congress of Colombia

Bogota, Colombia (27 to 30 November 2013)

The Executive Director gave the keynote speech at the LXXIX National Coffee Congress of Colombia. The theme of the Congress was 'Competitiveness in the coffee sector'. It was opened by the President of Colombia Juan Manuel Santos, accompanied by the Minister of Finance, Mauricio Cárdenas, and the Minister of Agriculture and Rural Development, Rubén Darío Lizarralde Montoya. In his speech, the Executive Director reiterated his support for the work and achievements of the National Federation of Coffee Growers of Colombia which was established 86 years ago, and commended the country for maintaining high quality standards that have characterized its coffee and made Colombia the benchmark for premium beans across the globe.

World Coffee Leaders Forum and Café Show

Seoul, Republic of Korea (20 to 22 November 2013)

The Executive Director was invited to give the keynote speech on 'Global Coffee Market Issues and Trends' at the World Coffee Leaders Forum and Café Show. During his visit he met representatives of the coffee industry in the Republic of Korea to discuss the benefits of membership of the International Coffee Agreement 2007.

Third Macquarie Global Agriculture Conference

London, United Kingdom (19 November 2013)

The ICO Economist attended the Third Macquarie Global Agriculture Conference, where he participated in a panel discussion on Soft Commodities: Navigating through supply, demand and policy risks.

1st African Coffee Symposium and 53rd Annual General Assembly of the InterAfrican Coffee Organisation (IACO)

Lomé, Togo (18 to 22 November 2013)

The theme of the Symposium was 'Sustainability of African coffee industry'. The Opening Ceremony was chaired by the Minister of Trade and Private Sector Promotion, Bernadette Balouki-Legzim, accompanied by the Minister of Higher Education, Octave Nicoué Broohm, who represented the President of Togo. The Secretary-General of IACO, Frederick Kawuma, opened the proceedings and the ICO Head of Operations delivered a message on behalf of the Executive Director, inviting the Secretary-General to expand membership of IACO to other African countries such as South Africa and Egypt that are non-coffee producing countries but have great potential for coffee consumption. The ICO Chief Economist made a presentation on the outlook for the world coffee market. The Symposium analysed challenges facing the sector and the need for continued international cooperation to ensure a sustainable coffee economy. IACO has 25 member States, representing 12% of world coffee production.

2nd International Ethiopian Coffee Conference

Addis Ababa, Ethiopia (4 and 5 November 2013)

The Executive Director was invited to speak at the 2nd International Ethiopian Coffee Conference which was organized by the Ethiopian Coffee Exporters Association. The theme of the Conference was 'Building a sustainable coffee future'. The Conference was opened by the President of the Republic of Ethiopia, Mulatu Teshome, and attended by dignitaries including the State Minister of Trade, Yacob Yala. During his visit, the Executive Director had a meeting with the President of Ethiopia to discuss coffee issues.

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Promoting Consumption

Background

ICO promotion programmes made a positive contribution to developing the coffee sector during the coffee price crisis (2000 to 2005) as part of an overall strategy to reduce imbalances between demand and supply in traditional and emerging markets. Since 2001, annual growth rates of coffee consumption have averaged around 2.4%, compared to under 2% in the 1990s.

One of the central objectives of the 2007 Agreement is to promote the development of consumption and markets for all types and forms of coffee. A long-term strategy could help to reduce volatility, and promoting consumption when prices are higher could help to avert a future crisis if coffee supplies increased in response to increases in prices.



Mexico Presents Online Campaign to Promote Consumption

At the September 2014 meetings, the Mexican delegation presented an online marketing campaign to promote domestic coffee consumption aimed at young people. The campaign uses social media tools like Facebook, Twitter, and Instagram, as well as video website YouTube to promote the consumption of coffee in Mexico. Belisario Domínguez Méndez, General Director of Productivity and Technological Development at the Mexican Ministry of Agriculture, Livestock, Rural Development, Fisheries and Food (SAGARPA), who attended the event on behalf of the Mexican Minister of Agriculture, Enrique Martínez y Martínez, delivered the presentation to the Promotion and Market Development Committee Members.

International Coffee Day

On 7 March 2014, the International Coffee Council agreed to hold an International Coffee Day each year on 1 October. The first International Coffee Day will take place on 1 October 2015, at the time of the International Coffee Council Session and Global Coffee Forum which will take place during Expo 2015 in Milan, Italy.

Communications

Background

In February 2014, the ICO recruited a Communications Officer to reposition the Organization's communications and assist the Head of Operations in their full implementation.

Social Media

The foundation of a modern communications strategy is engagement online and in social media. Using social media is an inexpensive and effective way of reaching a diverse audience with whatever message one is trying to promote. The ICO's existing social media sites have been refreshed and new content is being disseminated to the ICO's existing and new followers.

The ICO is now present on all the major social media sites including: Facebook, Twitter, LinkedIn, Google+, Flickr, Tumblr, Instagram, and YouTube. Use of social media websites has increased the visibility of the Organization.

From 1 October 2013 to 30 September 2014 the ICO's Facebook page saw a 76% increase in followers from 628 to 1,109. The ICO's LinkedIn profile has seen a 74% increase on followers since February 2014, from 351 followers to 611 followers on 30 September 2014. Created in February 2014, ICO's Twitter profile had 342 followers on 30 September 2014.

New ICO Blog & Newsletter

In addition to making the Organization more visible on social media in 2014, the ICO has also worked to make studies, reports, and news of the Organization easier to find and more enjoyable to read online. The new ICO Blog was created as the source of the latest news and information from the Organization. The monthly Coffee Market Report, for example, was redesigned for the ICO Blog by using a lighter, more modern colour scheme and special branding. Since the implementation of the Blog, the ICO has seen an increase in the number of journalists who quote the Coffee Market Report as well as studies and statistics produced by the ICO. The Blog will be integrated into a new ICO website to be launched in 2015.

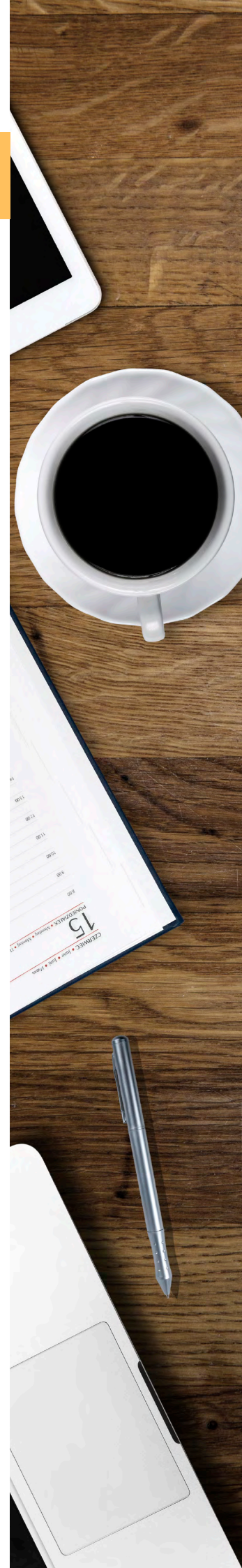
In April 2014, a monthly email newsletter was introduced with mailing lists targeting specific groups of interest, including Members, Observers, press, and the general public. The Public list had 750 subscribers at the end of September 2014.

Global Coffee Report

In May 2014, the ICO announced a partnership with Global Coffee Report magazine, an Australian publication targeted at professionals in the coffee industry. The ICO's Executive Director provides editorials, exclusive to GCR Magazine, on the latest developments affecting the coffee industry across the world.

The ICO's first column in GCR was published in the July-August 2014 edition of the magazine. In it, the ICO's Executive Director, advocates the public-private Partnerships to support research in coffee-producing countries.

The second column was published in the September-October 2014 edition of GCR. It focused on the climate change mitigation actions taken by a coffee cooperative in Costa Rica. It includes a call to civil society and the public and private sector to learn from this small group and work on concrete actions towards climate change mitigation.





Private Sector Cooperation

The ICO engages with the private sector through the Private Sector Consultative Board (PSCB), which meets during the week of the Council sessions. In 2013/14, the PSCB was chaired by Ric Rhinehart of the Specialty Coffee Association of America (SCAA). It discussed a wide array of issues currently facing the coffee sector, with a particular focus on the coffee leaf rust crisis which has afflicted many countries in Central America.

The Chairman of the Coffee Board of India presented the results of an ICO project on coffee leaf rust in India and four African countries (Kenya, Rwanda, Uganda and Zimbabwe), and highlighted the importance of disseminating this information to other producing countries. He also outlined the links between India and the Coffee Rust Research Centre (CIFIC) in Portugal, which had been established in 1955, and was the primary source of research on rust-resistant coffee varieties, and had so far evolved 13 rust-resistant Arabica cultivars.

Slides for presentations made at the PSCB can be found at www.ico.org/presentations1314.asp

The CIFIC is the largest bank of knowledge and coffee-testing in the world, but funding had dried up and the Centre was now under threat. It was considered essential to identify alternative sources of funding to continue this important work. The Executive Director of World Coffee Research also emphasized the urgent need to take action concerning this situation, as the CIFIC was the only place in the world to test and screen for rust resistance. The PSCB wished to recommend to the Council, in the strongest terms, to consider alternative ways of funding this institution.

The Board received several informative presentations on the coffee sectors in specific countries, including the Republic of Korea, Lao People's Democratic Republic and the United States of America. The Chairman of the Vision 2020 Task Force spoke about the work being done on coffee sustainability, and the need to bring farmers together and increase private sector cooperation, while the Coffee Quality Institute outlined a new initiative called the Partnership for Gender Equity, which was taking a much-needed strategic approach to the issue of gender equality in the coffee sector.

The PSCB keeps an eye on developments in coffee and health, including issues such as legislation on caffeine, acrylamide and food labelling, all of which could have a significant effect on the coffee market as a whole. Finally, the Board received an update on the launch of the first International Coffee Day, scheduled for 1 October 2015, an initiative which began life as a recommendation from the PSCB to the Council.

Statistics

The Organization continues to monitor exports to producing countries, an increasingly important flow of trade. Improved reporting on the volume of imports by producing Members will enhance greater market transparency. In 2013 the volume exported to producing countries was 10.8 million 60-kg bags, compared to 12.5 million bags in 2012.

Improved reporting by exporting Members indicates a continuing growth in the volume of organic and differentiated coffee exports reported based on both Certificates of Origin and Statistical Reports. It was also noted that inventories held in European ports collected by the European Coffee Federation continued to be incorporated into the Organization's database.

Compliance of statistical data by exporting Members fell during the year and on average, 68% achieved full or satisfactory compliance with the Rules on Statistics, while importing Members achieved almost 100%.

In an effort by the Secretariat to assist exporting Members in improving the provision of statistical data, a video that serves as a 'manual on compliance' is available on a USB memory stick from the Statistics Section. This can also be viewed on the ICO website http://www.ico.org/about_statistics.asp.

Policies on the future dissemination of data and conversion factors were also discussed and remain on the Agenda of the Statistics Committee.

Statistics Roundtable

In March 2014, the Council endorsed the work of an informal Statistics Roundtable, comprising the ICO Statistics team and experts from across the coffee sector, including independent analysts, consultants and major traders. The purpose of this Roundtable was to examine the ICO's statistics rigorously, discussing their provision and accuracy.

The aim is to make the ICO's statistics the benchmark for the international coffee sector, particularly for historical data. The work of the Statistics Roundtable has now been formalized, with the group meeting on a quarterly basis to discuss specific aspects of ICO statistics. In 2014, the focus was predominantly on consumption statistics. The Roundtable found that the ICO statistics were broadly in line with the experts' data; however they did recommend a revision of the methodology for calculating consumption in the European Union. In 2014/15, the Roundtable will examine production numbers and the global coffee balance.



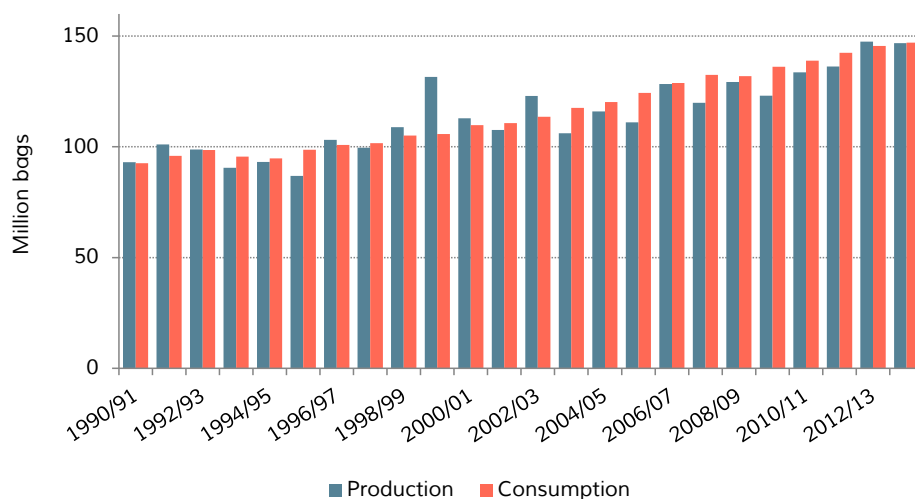
Economic Studies

World coffee trade (1963-2013): A review of the markets, challenges and opportunities facing the sector (Document [ICC-111-5 Rev. 1](#))

The study provides an overview of the market trends and developments since the ICO was established in 1963. The world coffee market has undergone a significant transformation over the last 50 years. The study compares and contrasts market prospects in the two time periods (Regulated market and free market era), and considers how developments in market fundamentals have influenced prices over time. The current challenges and opportunities for the coffee market were explored, with a particular focus on the three 'pillars' of sustainability: economic, social and environmental. It gives an assessment of the impact of price volatility on coffee producers, including the use of risk management instruments and managing the various costs of production.

The impact of climate change, the most significant threat to sustainable coffee production was analysed. In terms of the global coffee balance, the general outlook seems positive. World production grew steadily over the last 50 years despite climatic shocks. It will be difficult to maintain this trend, however, mainly on account of the continued rise in production costs as well as problems related to pests and diseases which could affect this steady growth in production. Moreover, climate change could also have a negative impact on production in many countries unless urgent research is carried out on adaptation measures.

Graph 1: World coffee production and consumption (1990/91 - 2013/14)



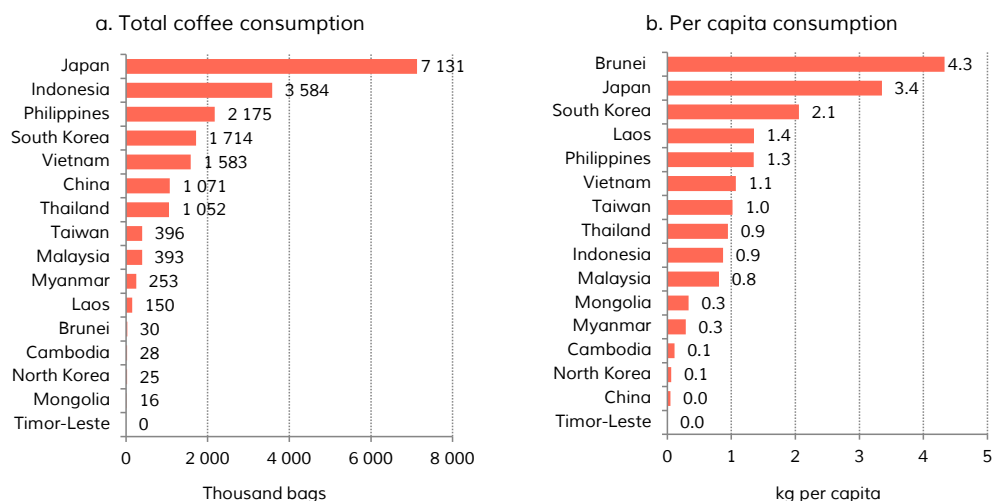
Prospects for growth in world coffee demand remain promising, mainly in emerging markets and exporting countries, in addition to the expansion of niche markets in traditional consuming countries. Indeed, consumption in emerging markets and exporting countries has been growing rapidly and shows strong potential for further growth. Exporting countries whose economic prospects are favourable for increased coffee consumption include Brazil, Indonesia, India and Mexico. Living standards in some coffee-exporting countries continue to improve, creating strong potential for growth in domestic coffee consumption, given an expanding middle class. Emerging markets are found in newly industrialized countries which have experienced considerable economic and social development. On the other hand, this growth in consumption should help to maintain a tight balance between supply and demand. In addition, the development of a processing industry in exporting countries could enable them to increase added value in the coffee sector.

Coffee consumption in East and Southeast Asia: 1990 – 2012 (Document [ICC-112-4](#))

This study focuses specifically on the dynamics of coffee consumption in East and Southeast Asia since 1990, and expands on the study *Coffee in China* (Document [ICC-111-8](#)), published in August 2013. It gives an overview of coffee demand growth in the region as a whole, before giving a brief summary of developments in selected individual markets, specifically Japan, Indonesia, South Korea, the Philippines, Vietnam, Thailand, China (including Macao and Hong Kong), Taiwan, Malaysia, Laos and Myanmar. The remaining markets of Brunei, North Korea, Cambodia, Mongolia and Timor-Leste are discussed in less detail, as the overall volumes involved are still very low. Coffee consumption in the region has been growing strongly over time, more than doubling from 8.4 million 60kg bags in 1990 to 19.5 million bags in 2012. This represents an average growth rate of 3.9% per annum.

Furthermore, the share of East and Southeast Asia in world coffee consumption has also been increasing, accounting for 13.8% of the world total in 2012, up from 9.4% in 1990 and 10.9% in 2000. New and emerging markets tend to show a preference for Robusta-based products, particularly soluble coffee and 3-in-1 or 4-in-1 ready-to-drink products. However, as the coffee market develops, it undergoes a transition towards Arabica-based ground coffee consumption. This transition is usually correlated with increasing GDP, as well as urbanization and demographic evolution.

Graph 2: Coffee consumption in East and Southeast Asia (2012)



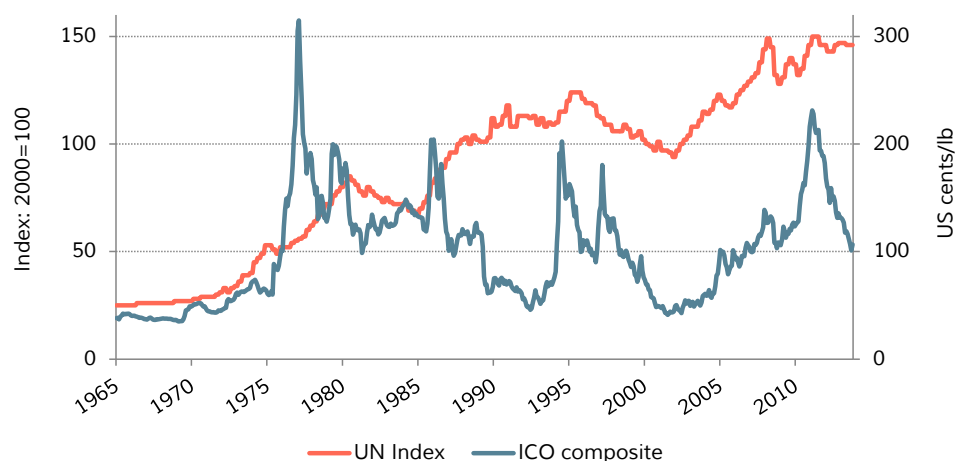
As a market becomes more mature, volume growth in consumption slows and is replaced by value augmentation, with a higher preference for specialty coffee. In East and Southeast Asia, this is best exemplified by the Japanese coffee market.

Nevertheless, consumption in this region remains one of the most dynamic and high potential markets for future coffee demand. With 31% of the world's population and 29% of world GDP, the sixteen countries in this report currently account for just 14% of world coffee consumption. However, this share is rising, and if current trends continue, the region could potentially consume 28 to 30 million bags of coffee by 2020.

Comparative analysis of world coffee prices and manufactured goods (Document [ICC-112-8](#))

The study introduces a comparison of the evolution of coffee prices and manufactured goods in order to assess the terms of trade between coffee exporting and importing countries. The methodology of the study was based on monthly averages of world coffee prices, including the ICO composite indicator, group indicator, and prices on the futures markets (New York and London), for the period 1965 to 2013. As reliable data on agricultural inputs are not easily available, the United Nations index of manufactured goods exports in developed countries over the same period were used as a proxy. It should be noted that for many exporting countries, coffee is an important source of foreign exchange, while mechanized or industrial inputs are generally imported. Therefore, the value of manufactured goods imported by coffee producing countries will have important consequences for the relative value of coffee. Indeed, the prices of certain manufactured goods imported by coffee producing countries can affect the value generated by their coffee exports.

Graph 3: Evolution of ICO composite indicator price and UN manufactured goods



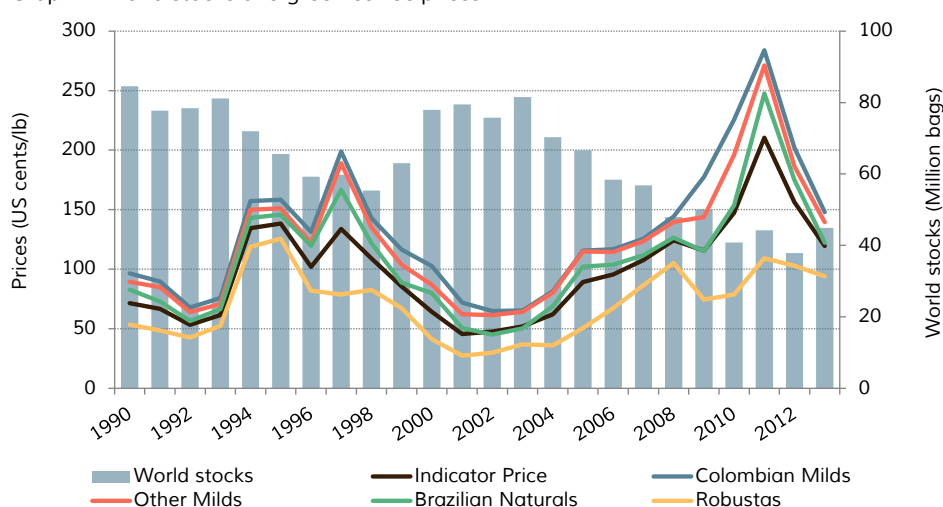
Among the imported manufactured goods that can affect coffee export earnings, the most commonly mentioned are prices of the inputs used in coffee farming, particularly agricultural machinery, such as tractors, and fertilizers. In conclusion, it was noted that a large number of developing countries continue to depend on exports of agricultural products with a negative impact on their terms of trade compared to manufactured goods.

However, the structure of their exports has changed over time leading to a reduction in the importance of these primary commodities. Furthermore, significant increases in coffee productivity have been observed in many producing countries over the last 50 years. This has allowed coffee exporting countries to produce more coffee with greater efficiency, which will partially offset any losses in the terms of trade with developed countries, thus complicating the comparative analysis. Moreover, some coffee exporting countries have also become suppliers of manufactured goods to industrialized countries, which will further reduce the impact of declining terms of trade. A more in-depth analysis of the performance of the terms of trade for individual coffee exporting countries would make it possible to draw clearer conclusions.

Factors to achieve a balanced market (Document [ICC-113-6](#))

The study analyses the extent to which fundamental factors could be favourable to a balanced market and lead to prices that could ensure a sustainable coffee economy. For this purpose, the study explores the impact of fundamental factors on the evolution of coffee prices and analyses the extent to which management of these fundamental factors could contribute to achieving a balanced market and price levels that would cover the production costs of efficient producers. The main factors involved in determining coffee prices are related to supply and demand, particularly production, consumption and stock movements. However, exogenous factors like speculative movements in the market can sometimes have a profound effect on the impact of fundamental factors on price formation.

Graph 4: World stocks and green coffee prices



The relationship between coffee production and prices shows a number of distinctive features since falls or increases in production do not necessarily trigger rises or falls in prices. Correlation coefficients between coffee production and prices are not very significant. The coffee market, like most other perennial crop markets, will always be unbalanced, given the aleatory nature of production.

This means that the main factors for price instability are related to the supply situation, particularly production. Since coffee supply and demand price elasticities are weak in the short term, delayed reactions between production and consumption in response to price developments lead to over-reaction that can sometimes cause marked volatility. Changes in the supply situation can encourage or prevent the emergence of factors of a speculative nature, particularly investment fund activities. The interaction between fluctuating supplies and rigid demand, as well as the existence of adaptive anticipatory measures on the part of producers, induces a cyclical character in green coffee prices.



Coffee Seminar

In March 2014, the ICO held a Coffee Seminar, in association with Informa. This was the first time that the ICO had organized a Seminar in conjunction with a private company. The theme of the event was Achieving Sustainable Supply in the Coffee Market: Overcoming the current over-supply and its detrimental effect on coffee prices. It was a full-day event aimed at both ICO Members and the private sector.

The event generated a high degree of interest, with over 200 participants attending, including representatives from Member countries, non-member countries, financial institutions, traders and the private sector, who heard presentations from leading experts in the coffee sector. The guest speakers included analysts from BNP Paribas, Ecobank, F.O. Licht, J. Ganes Consulting, Nestlé and Macquarie Bank.

The day was split into four major themes: Global Production and Trade Overview; Capitalising on New Trends, New Markets and New Product Development; Price Forecasts, Currency Fluctuations and Solutions Available for Managing Price Volatility; and Supply-Side Outlook, with opportunities for questions and networking sessions. The key issue of the day was sustainability, as one of the pillars of the International Coffee Agreement, with the objective of developing a comprehensive action plan to encourage ICO Members to promote a sustainable coffee sector. The Coffee Seminar was chaired by Conradin Rasi of Switzerland, and was successful in bringing together key actors from across the coffee world and generating interesting insights into the sector.

Photos from the Coffee Seminar

Photos from the Seminar can be found on the web by visiting the ICO's Flickr page at flickr.com/icocoffeeorg



Coffeeline, the ICO's searchable online catalogue (<http://ico.heritage4.com/>), was used by people across the world and enquiries by email were answered on subjects ranging from ideal water temperature for boiling coffee to per capita consumption and from coffee leaf rust facts and figures to how to start a business in coffee, inter alia. The map below pinpoints the 84 countries where enquiries came from:



Office Holders

International Coffee Council

Chairperson: Jawaid Akhtar (India)

Vice-Chairperson: Conradin Rasi (Switzerland)

Private Sector Consultative Board (2013/14 – 2014/15)

Chairperson: Ricardo Villanueva (Anacafé) • **Vice-Chairperson:** Ric Rhinehart (SCAA)

Producer Representatives: Colombian Milds: Federación Nacional de Cafeteros de Colombia (FNC), Sociedad Exportadora de Café de las Cooperativas de Caficultores (EXPOCAFÉ), African Fine Coffees Association (AFCA) • **Other Milds:** Asociación Nacional del Café (Anacafé), Coffee Exporters Association of India • **Brazilian and Other Natural Arabicas:** Associação Brasileira da Indústria de Café (ABIC), Associação Brasileira da Indústria de Café Solúvel (ABICS), Conselho dos Exportadores de Café do Brasil (CeCafé), Confederação da Agricultura e Pecuária do Brasil (CNA), Conselho Nacional do Café (CNC), International Women's Coffee Alliance (IWCA) • **Robustas:** Conseil du Café/Cacao (3C), Indonesian Coffee Exporters Association (GAEKI), Uganda Coffee Federation (UCF) • **Consumer Representatives:** All Japan Coffee Association (AJCA), Coffee Association of Canada (CAC), European Coffee Federation (ECF), Institute for Scientific Information on Coffee (ISIC), National Coffee Association of USA (NCA), Russian Association of Tea and Coffee Manufacturers (Rusteacoffee), Specialty Coffee Association of America (SCAA), Speciality Coffee Association of Europe (SCAE)

Note: Alternates are shown in italics

Consultative Forum on Coffee Sector Finance

Chairperson: Juan Esteban Orduz (Colombia) • **Vice-Chairperson:** Manfred Brandt (European Union)

Core Group on the Consultative Forum (2013/14 – 2014/15)

Exporting Members: Brazil, Colombia, Costa Rica and Côte d'Ivoire • **Importing Members:** European Union, Switzerland and the USA • **Ex-officio Member:** Executive Director • **Assisted by:** Chairperson of PSCB and four advisors: Marc Sadler (World Bank), Noemí Pérez (FAST), Silas Brasileiro (National Coffee Council of Brazil) and Nicolas Tamari (Sucafina S.A.)

Promotion and Market Development Committee

Chairperson: Andrea Illy (EU-Italy) • **Vice-Chairperson:** Belisario Domínguez Méndez (Mexico) • **Exporting Members:** Brazil, Cameroon, Colombia, Guatemala, India, Indonesia, Mexico and Tanzania • **Importing Members:** European Union, Switzerland and the USA

Projects Committee

Chairperson: Ina Grohmann (EU-Germany) • **Vice-Chairperson:** Oke Nurwan (Indonesia) • **Exporting Members:** Brazil, Colombia, Ecuador, Honduras, Indonesia, Kenya, Uganda and Vietnam • **Importing Members:** European Union, Switzerland and the USA

Finance and Administration Committee

Chairperson: Aly Touré (Côte d'Ivoire) • **Vice-Chairperson:** Brendan Lynch (USA) • **Exporting Members:** Brazil, Colombia, Côte d'Ivoire, India, Mexico and Vietnam • **Importing Members:** European Union, Norway, Switzerland and the USA

Statistics Committee

Chairperson: Brendan Lynch (USA) • **Vice-Chairperson:** José Cassule Mahinga (Angola) • **Exporting Members:** Angola, Brazil, Colombia, Ghana, Honduras, India, Indonesia and Nicaragua • **Importing Members:** European Union, Switzerland and the USA

Virtual Screening Subcommittee

Chairperson: Executive Director • **Exporting Members:** Brazil, Côte d'Ivoire, Guatemala and Indonesia • **Importing Members:** European Union and the USA



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