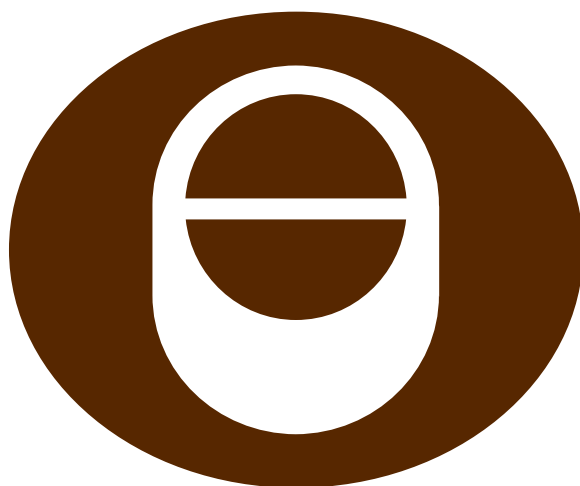
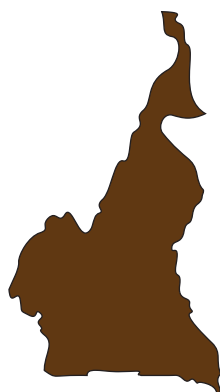


INTERNATIONAL COFFEE ORGANIZATION



COUNTRY COFFEE PROFILE

CAMEROON





COUNTRY COFFEE PROFILE CAMEROON



OFFICE NATIONAL DU CACAO ET DU CAFE

NATIONAL COCOA AND COFFEE BOARD



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PREFACE

This profile on the coffee sector in Cameroon is the second in a series of Member country coffee profiles. It meets one of the objectives of the International Coffee Agreement 2007, specifically collecting, disseminating and publishing economic, technical and scientific information, statistics and studies, as well as the results of research and development in coffee matters. These objectives have been reinforced by the recent recommendations of the Working Group on the Strategic Review.

On this basis, guidelines have been provided to be used as a framework for this series, which aims to provide comprehensive and current information on the coffee sector in specific countries. These profiles are extremely important in improving the visibility of the world coffee economy and identifying key trade flows.

I would like to thank the senior management of the National Coffee and Cocoa Board (NCCB), and its technical staff for preparing the first draft of this report. I would also like to thank the ICO Secretariat for editing the text and collaborating with the coffee authorities in the preparation of the Country Coffee Profile for Cameroon.

I sincerely hope that this profile will be of interest and value to our Members, as well as all other stakeholders working in the field. The agro-ecological diversity of Cameroon presents a potential for the production of high quality coffee varieties. Finally, the ICO staff and I remain open to any observations and suggestions that will assist us in increasing the accuracy and value of the document in the future. I am confident that the wealth of information contained in this publication, and those to follow in this series, will provide delegates, researchers and readers with a better understanding of the dynamic nature of the coffee industry worldwide.

José Sette

Executive Director

International Coffee Organization

FOREWORD

Since Cameroon became independent in 1960, coffee has played a key role in the country's development, together with cocoa and cotton. At the economic level, coffee was one of the main sources of the foreign currencies required to equip the country with productive investment, while in social terms it was virtually the only source of monetary income of rural populations. To some extent, coffee governed the life of these communities. Coffee was therefore of particular interest to the State, which ensured its operation by means of input distribution, price support and various forms of participation.

Unfortunately, low coffee prices and the withdrawal of the State over the past three decades have deprived farmers of all the advantages that made the sector so attractive, bringing about a gradual decline in the activity. This situation gradually undermined interest in this crop that provided work for the populations of whole regions, causing a virtually irreversible loss of dynamism despite the considerable efforts that have been increasingly made since the structural adjustment point was reached.

This profile of Cameroon is the result of coordinated work from a multidisciplinary team consisting of the public sector, institutional stakeholders of the coffee sector and coffee growers. It sets out to describe the economic and institutional underpinning of our coffee sector and was produced through cooperation between the sector's various stakeholders in Cameroon and the International Coffee Organization. It presents a description of the economic and institutional structure of our coffee sector and provides an overview of our coffee sector in accordance with the country profile guidelines approved by the International Coffee Council (ICC) during its 116th Session in March 2016. Any shortcomings that may appear will be corrected in subsequent editions.

Finally, I am very happy and proud to note that this profile on the coffee sector of Cameroon is the second in a series of similar ICO publications on the national coffee industries of both exporting and importing countries. For this I should register my appreciation and thanks to the Executive Director, to his staff and to all those who worked so diligently on this publication.

Michael Ndoping
Managing Director
National Cocoa and Coffee Board

1. BACKGROUND

1.1 Geographical setting

Cameroon takes the form of a right-angled triangle with a 1,500 km hypotenuse stretching from Lake Chad to the Gulf of Guinea, and an 800 km base stretching from the Atlantic Ocean to the border with the Central African Republic. The country has an area of 475,650 km², with 466,050 km² of land mass and 9,600 km² of water. Due to this privileged geographic situation and its extent in terms of latitude, Cameroon has a broad range of soils and climates and a consequent diversity of ecosystems supporting an equally rich and diversified flora and fauna.

In agricultural terms, the diverse pedo-climatic conditions mean that Cameroon can be subdivided into five major agro-ecological zones:

- **The Sudano-Sahelian zone**, roughly including the North and Far North regions over an area of 10.2 million hectares, 0.56 million of which are cultivated. The climate is marked by monomodal rainfall of varying duration and intensity (from 400 to 1,200 mm per year from north to south).
- **The Guinea High Savannah zone** basically covers the Adamaoua region and the northern part of the departments of Mbam (Centre region) and Lom-et-Djerem (East region), totalling 138,000 km². This represents 28% of the country's area and largely consists of a vast plateau at altitudes between 900 and 1,500 m, with peaks rising to 1,800 m.
- **The Western High Plateau zone** covers the West and North-West regions and accounts for a total area of 3.1 million hectares. This zone has a broad range of relief: the Bamoun plateau rises to an altitude of 1,240 m, the Bamileke plateau reaches as far as Mount Bamboutos (2,740 m) and the Bamenda volcanic plateaux reach an altitude of 1,800 m.
- **The humid dense forest zone with monomodal rainfall** covers the Littoral and South-West regions and the coastline of the South region, occupying an area of 4.5 million hectares, 282,000 of which (6.3%) are cultivated. The terrain, which is largely flat, includes the volcanic slopes of Mount Cameroon, with an altitude of 4,095 m, and the rocky sediments along the coast. Rainfall is plentiful, averaging 2,500 to 4,000 mm.
- **The bimodal humid forest zone** extends over most of the South Cameroon plateau at altitudes of between 500 and 1,000 m, covering the Centre, South and East regions over a total area of 22.5 million hectares. Rainfall varies between 1,500 and 2,000 mm per year, divided into two clearly distinct rainy seasons which allow two growing cycles and a staggered agricultural timetable with phased planting and harvests. Vegetation consists of dense semi-

deciduous and evergreen forests. Traditional practice involves shifting cultivation via slash and burn followed by fallow periods to restore soil productivity. Crops are largely perennial (cocoa, Robusta coffee plants, a variety of fruit trees), and annual and multi-annual (plantain banana, sugar cane, maize, tobacco, fruit and vegetables, tubers, etc.).

1.2 Economic setting

The economic growth rate stood at 5.8% in 2015, compared to 5.9% in 2014. The national economy was therefore buoyant despite the external economic crisis, linked to a difficult international economic environment marked by falling oil prices. Cross-border insecurity was meanwhile generated in the East by the socio-political situation in the Central African Republic, and in parts of the Far North by the Boko Haram terrorist group. The average annual growth rate from 2013 to 2015 was 5.7%, half a point below the 6.1% target projected in the Growth and Employment Strategy Document.

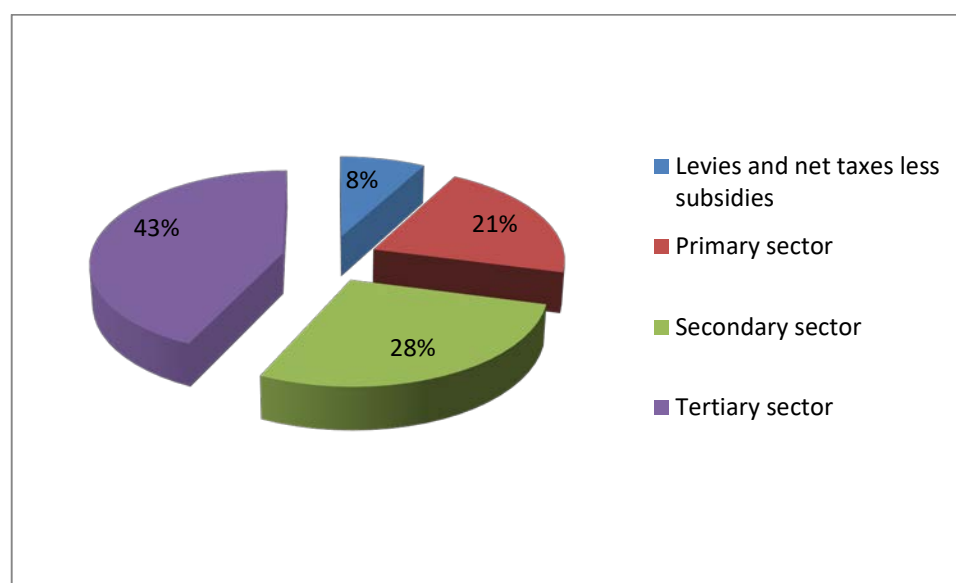
Table 1 shows that the share of agriculture is relatively stable, albeit with a slight downward trend (from 23.39% to 22.25%).

Table 1: Cameroon key economic indicators

	2010	2011	2012	2013	2014	2015
US Dollar exchange rate	495.3	471.9	510.5	494.0	494.4	591.4
Country size (sq km)	475 650	475 650	475 650	475 650	475 650	475 650
Population (million)	19.7	20.1	20.6	21.1	21.7	22.2
Men	9 707	9 949	10 195	10 445	10 699	10 966
Women	9 940	10 189	10 441	10 697	10 957	11 231
GDP (US\$ million)	23 623	26 588	26 473	29 568	32 050	28 422
GDP per capita (US\$)	1 202	1 320	1 283	1 399	1 480	1 280
GDP growth rate (%)	3.3	4.1	4.6	5.6	5.9	5.8
Interest rate (%)	13	13	13	13	13	13
Inflation (%)	1.3	2.9	2.4	2.1	1.9	3
Total exports (US\$ million)	3 861	4 522	4 274	4 515	5 174	4 119
Agricultural share of GDP (%)	23.4	23.6	23.2	22.9	22.2	22.3

Source: NIS, BUCREP, World Bank

A sectoral view of the Cameroon economy shows that primary sector GDP is growing at an average of 4% per year and accounted for an average of 21.3% of GDP between 2010 and 2014. Secondary sector growth averages 3.9% while its share of GDP stands at 27.6%. Tertiary activity increases by 5.3% per year and accounts for an average of 43.4% of GDP. This growth is driven by trade, post and telecommunications and transport.

Figure 1: Sectoral division of GDP in Cameroon in 2015

Source: NSI, 2016

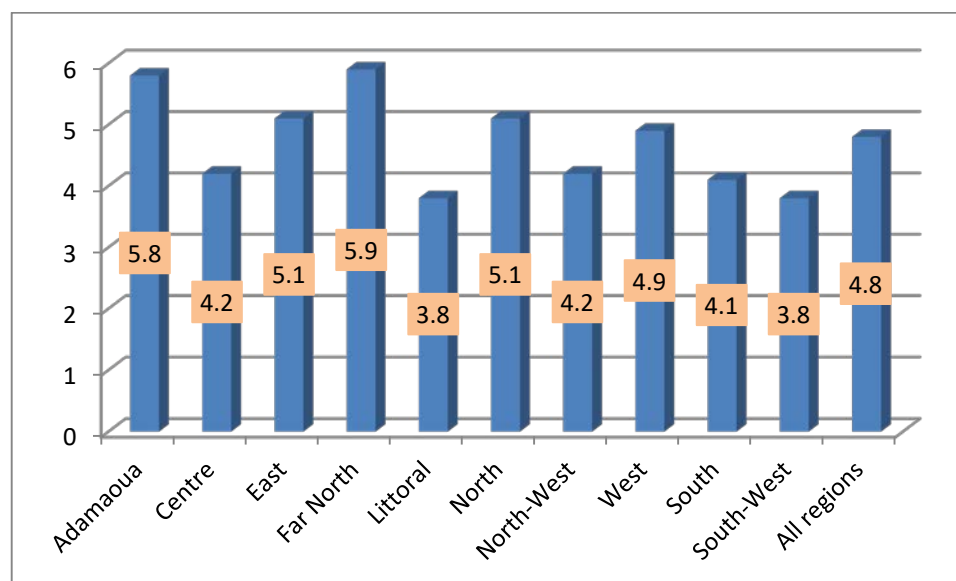
Agriculture plays a dominant role in the Cameroon economy and is the country's principal source of revenue. It accounts for a quarter of exports and occupies 80% of the working population. Ministry of Agriculture and Rural Development (MINADER) statistics estimated that there were just under two million agricultural households in Cameroon in 2009 (see Table 2).

Table 2: Number of agricultural households in the 10 regions of Cameroon in 1984, 2005 and 2009

Region	1984	2005	2009
Adamaoua	55 600	113 579	118 863
Centre	162 900	202 730	212 164
East	66 700	113 873	119 171
Far North	285 400	385 661	403 605
Littoral	65 400	104 748	109 622
North	98 700	224 710	235 165
North-West	131 800	228 946	239 598
West	159 300	266 745	279 157
South	55 100	79 180	82 864
South-West	74 600	169 320	177 197
Total	1 155 500	1 889 492	1 977 406

Source: MINADER, 2010

According to MINADER, agricultural activity in Cameroon is carried on by households of an average of 4.8 persons (see Figure 2).

Figure 2: Average size of agricultural households in Cameroon according to regions

Source: MINADER, 2010

This average size of 4.8 persons is distributed around two limits: 3.8 in the Littoral and South-West regions, marked by strong urban development, and 5.9 for the highly rural Far North.

1.3 Summary of coffee history in Cameroon

Coffee growing was probably introduced into Cameroon soon after 1884. Up to 1925, the settlers merely studied several varieties of coffee in test gardens in the country, such as Victoria (in the current South-West region), Ebolowa (in the current South region), Nkongsamba (in the current Littoral region) and Dschang (in the current West region). Coffee growing expanded significantly between 1925 and 1926, when it was extended to forest areas in Yokadouma, Abong-Mbang, Doumé, Lomié and Akonolinga in particular. In 1927 successful experiments took place in the Western High Plateaux. It was observed after all these trials that the best land for coffee production was to be found on the Western High Plateaux and in the Mungo area.

Coffee growing really took off from 1929 with the arrival of a Frenchman, René Coste, an agricultural engineer who ran the Dschang Agricultural Station. He gave impetus to the rapid growth of this cash crop.

Production

Average coffee production rose from 1 million 60-kg bags in 1960 to 1.7 million in 1980, reaching a peak of 2.2 million bags in 1986/87. This was followed by a steady decline to 409,000 bags in 2015/16, due in part to a fall in yields, the suspension of certain state subsidies for agrochemicals and farmers' preference for other potentially more lucrative food crops.

Marketing

Coffee marketing followed a two-stage process:

- Stabilization
- Liberalization

Stabilization

Marketing was overseen by the National Marketing Office for Primary Commodities (ONCPB), a body created on 9 September 1976. Arabica coffee from the West, however, was marketed by the Central Union of Agricultural Cooperatives (UCCAO), which enjoyed a state-granted monopoly. The ONCPB was active in the French-speaking region as a stabilization fund and negotiated contracts on behalf of private exporters, while in English-speaking regions this body purchased coffee directly from authorized buyers. Stabilization was multiannual during this period. Prices were fixed by the ONCPB, which supported farmers and operators.

From 1985, the country experienced a crisis linked to a decline in foreign trade following the collapse in the terms of trade and falling oil prices. This was exacerbated by increased international competition due to the rapid development of plantations in South-East Asia. Since further support for producer prices was not possible, a donor-driven reform was undertaken involving the following restructuring:

- Winding-up of the ONCPB in 1991, creation of the National Cocoa and Coffee Board (NCCB) and establishment of the Interprofessional Cocoa and Coffee Council (CICC).
- Liberalization and deregulation of marketing, leading to the discontinuation of stabilization measures and easing of conditions of access to the export trade.
- Privatization of the quality control of exports.

Liberalization

The first stage of liberalization began in 1991 with the creation of the NCCB and an annual stabilization process by means of an officially established fund. It was completed in 1994/95, when producer prices began to be determined by the market, resulting in:

- Reduction in the purchasing price to growers.
- Decline in the quality of products for export.

A significant decline in production and a general deterioration in quality followed. The State adopted a number of strategies. A strategy to rebuild the coffee sector was drawn up in 2011, followed in 2014 by a government plan to restructure the cocoa and coffee sectors.

1.4 Geographical distribution of coffee production

Two varieties of coffee are produced in Cameroon: Arabica and Robusta. Table 3 outlines the production for the last 12 crop years.

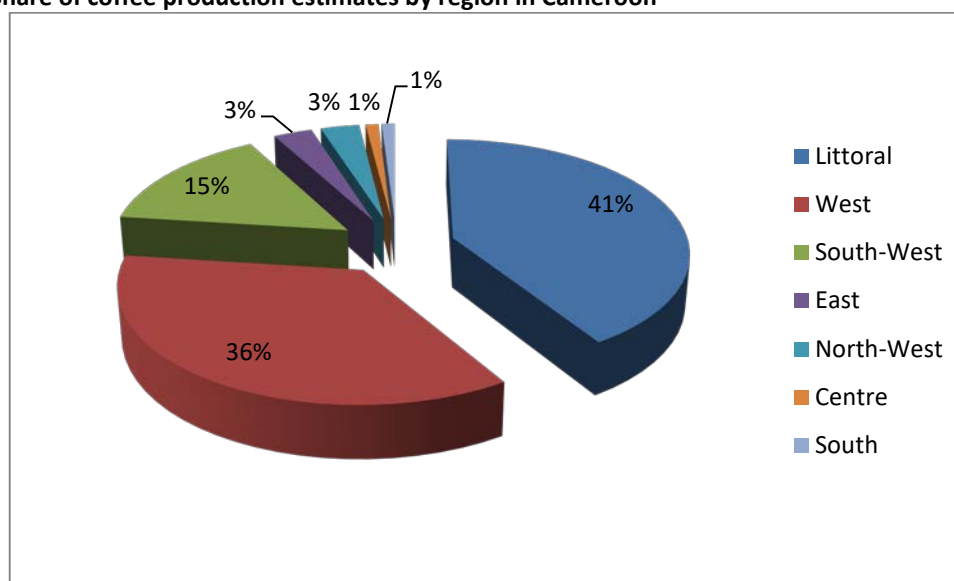
Table 3: Marketed production of Cameroon over the last 12 crop years
(in thousand 60-kg bags)

Years	Arabica	Robusta	Total	(%) share of Arabica	(%) share of robusta
2004/05	106	604	710	15	85
2005/06	76	700	776	10	90
2006/07	79	698	777	10	90
2007/08	87	501	587	15	85
2008/09	62	740	802	8	92
2009/10	58	643	700	8	92
2010/11	42	397	439	9	91
2011/12	49	586	635	8	92
2012/13	39	230	269	14	86
2013/14	48	499	547	9	91
2014/15	34	364	398	8	92
2015/16	73	336	409	18	82

Source: NCCB, 2017

Arabica accounts, on average, for 10% of the marketed production compared to Robusta (90%). Both products are grown in the following seven regions of the country: Centre, East, Littoral, North-West, West, South and South-West. The Littoral regions (particularly Mungo, a bastion of Robusta production) and the West regions account for the greatest share of output: 41% and 36% of the total respectively. The Centre, East and South regions account for around 5% and exclusively produce Robusta. The North-West, with 3%, produces only Arabica, while the South-West produces around 15% of both Arabica and Robusta (see Figure 3).

Figure 3: Share of coffee production estimates by region in Cameroon



Source: NCCB

2. COFFEE PRODUCTION

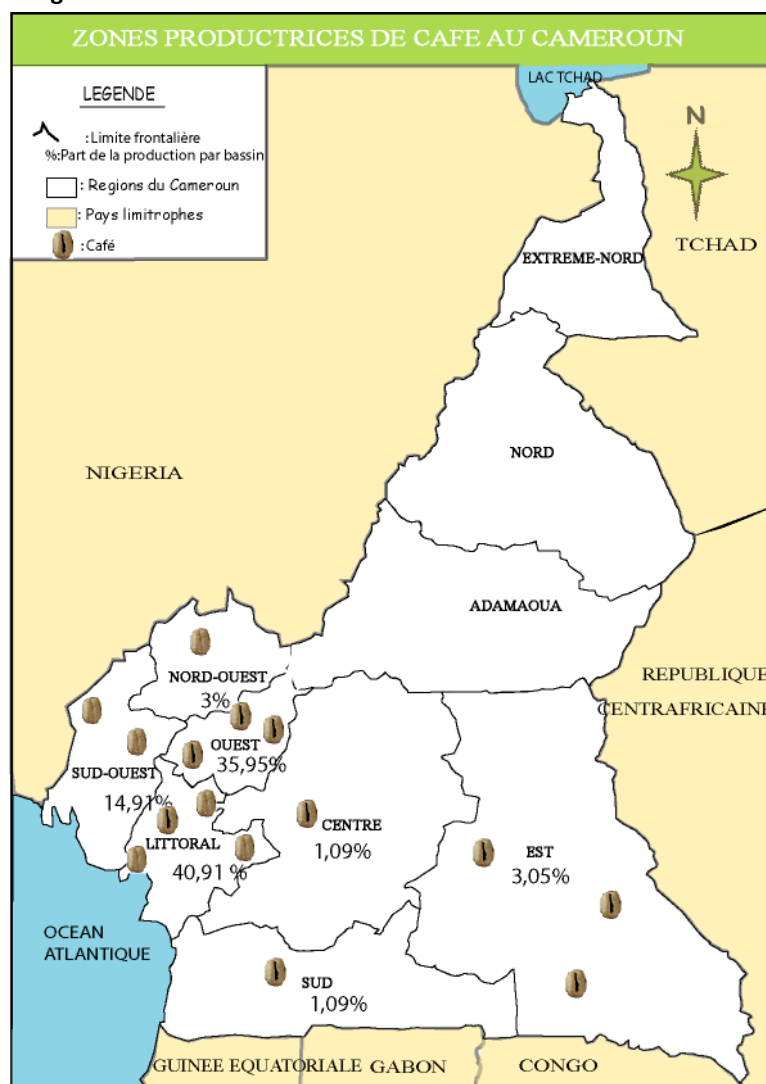
2.1 Types of coffee and areas of coffee growing

Arabica coffee is grown in high altitude regions: West, North-West and South-West, over some 10,000 hectares, with an average area of two hectares per farmer¹.

Robusta, meanwhile, is grown over an area of around 60,000 hectares in the Littoral, West, North-West and the East, Centre, South-West and South regions. Robusta is also grown in the Adamaoua region, specifically in the southern part of the district of Bankim which has climatic and geographical similarities with the department of Noun (West region) (see Figure 4).

¹ *The Coffee Sector Revitalization and Development Plan, 2014.*

Figure 4: Coffee-growing areas in Cameroon



Source: NCCB, 2016

2.2 Production systems

Arabica is grown at high altitudes with or without shade. Post-harvest operations mainly follow the wet processing method (washed coffee). A very small part is dry processed.

Robusta, although grown mostly in forest areas, is produced with or without shade. Post-harvest operations follow the dry method. Through its coffee sector revitalization plan (Coffee Sector Revitalization and Development Plan (PRDFCC)), however, Cameroon recommends the creation and generalization of new coffee washing stations which should reinforce the project in the medium-term, with systematic washing of all coffees for export (Arabica and Robusta).

With respect to productivity, a recent study showed a clear improvement in areas that are beginning to use fertilizers. Plant protection involving the use of insecticides is poor (2.54%), thereby helping to preserve tree layers and protect biodiversity.

2.3 Crop year

According to the Cameroonian regulations on the organization of the cocoa and coffee trade, coffee purchase and sales operations are carried out according to annual crop seasons which open and close as follows:

- **Arabica:** from 1 October to 15 September of the following year.
- **Robusta:** from 1 December to 15 November of the following year.

2.4 Plantations: smallholdings and estates

Growers of both types of coffee use the same structure, composed of 75% smallholdings and 25% estates, though Robusta holdings are smaller on average (0.5 ha compared to 1.9 ha for Arabica). Total cultivated areas in 2014 are 60,000 hectares² for Robusta and 10,000 hectares for Arabica, though the number of holdings is virtually identical for both types. Production is now based on farmers' organizations supported by the sector's lead institutions. The Coffee Sector Revitalization and Development Plan envisages the establishment of 60,000 hectares of Robusta plants and 35,000 hectares of Arabica plants by 2020 (see Table 4).

Table 4: Distribution of coffee holdings

	Robusta	Arabica
Proportion of small holdings (less than 3 hectares)	75%	75%
Proportion of estates	25%	25%
Areas covered by coffee farms (ha)	60 000	10 000
Areas to be created by year 2020	60 000	35 000
Average size of a holding	0.5 hectares	1.9 hectares

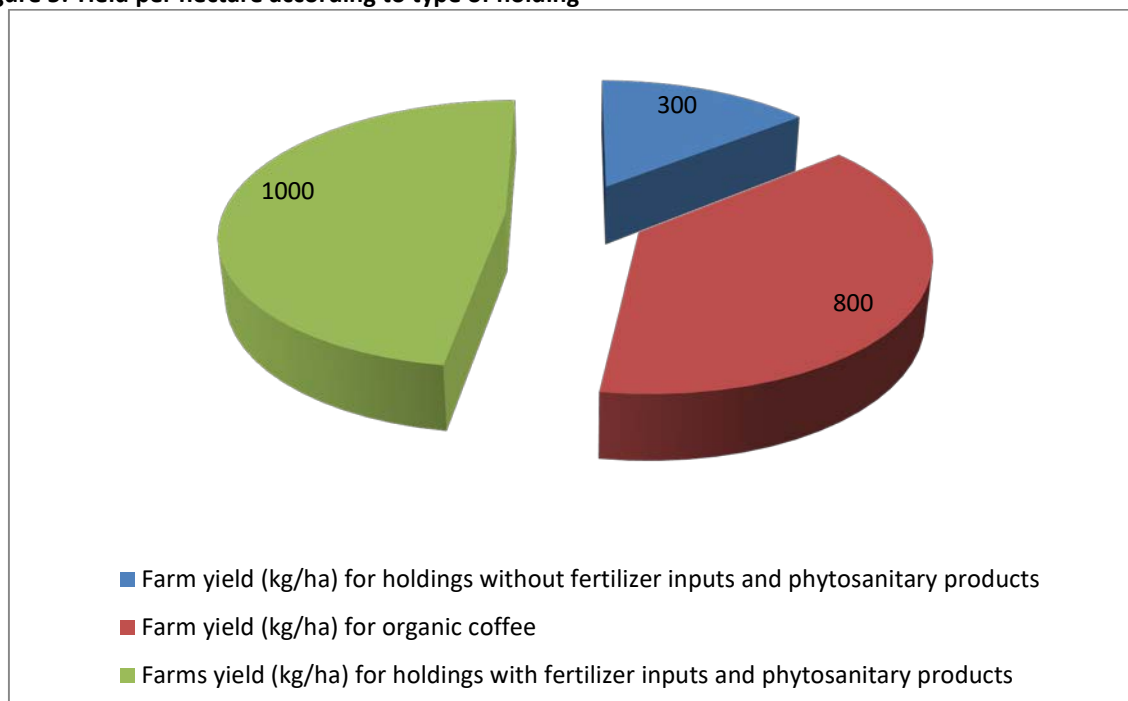
Source: PRDFCC, 2014

2.5 Yields

According to a 2015 NCCB survey, the decline in productivity was closely linked to an ageing tree population. The same study shows that the correct use of fertilizers in association with good health and plant protection practices ensures an optimum yield, as shown in the following Figure 5:

² The Coffee Sector Revitalization and Development Plan.

Figure 5: Yield per hectare according to type of holding



Source: Study NCCB, 2015

2.6 Other characteristics of coffee growing

The costs of newly-introduced organic coffee, producing a yield of less than 1,000 kg/ha, has had a mixed reception. The Government is seeking better markets for this coffee³.

2.7 Volume of production

Cameroon coffee production continues to be very erratic, with both varieties clearly tending to decline. The marketed volume of coffees fell from 439,000 bags in 2010/11 to 409,000 bags in 2015/16. These fluctuations reflect growing conditions that are extremely sensitive to cyclical parameters.

Table 5: Coffee production
(in thousand 60-kg bags)

Crop Year	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16
Robusta	397	536	230	499	364	336
Arabica	42	49	39	48	34	73
Total	439	585	269	547	398	409
African production	16 134	16 098	16 668	16 214	16 055	17 449
Share of Cameroon as % of Africa	2.72	3.94	1.61	3.37	2.48	2.34
World production	134 243	140 617	144 960	146 506	142 278	143 306
Share of Cameroon as % of world total	0.37	0.41	0.25	0.28	0.37	0.29

Source: NCCB, 2017

³ NCCB study, 2015

Production in Cameroon is concentrated in two significant areas, the West and the Littoral, which account for 75% of national production. Table 6 shows the area under cultivation and productivity by region.

Table 6: Estimate of cultivated areas and production by region during crop year 2014/15

Provinces	Planted areas		Production			
	(Thousand ha)	Share (%)	Thousand 60-kg bags	Share (%)	Yield (60-kg bags/ha)	Yield (kg/ha)
West	30	43	148	36	4.8	286
North-West	5	7	12	3	2.4	144
South-West	10	14	61	15	6.0	360
Littoral	18	25	168	41	9.1	543.3
East	5	7	12	3	2.4	144
South	1.40	2	4	1	2.9	171.4
Centre	1.40	2	4	1	2.9	171.4
Total	70	100	409	100		
Robusta	60	86				

Source: NCCB, MINADER, 2011

2.8 Gender gap

The reform of the land ownership system in 2005 allowed land management to be decentralized, enabling easier access to ownership. For socio-cultural reasons, however, women in Cameroon still have difficulty in gaining access to land. It is estimated that 90% of landowners in Cameroon are men compared with 10% being women.

3. PRODUCTION COSTS DURING THE PERIOD 2010 TO 2014

3.1 Establishment costs/initial investments

The establishment costs of a hectare of coffee stand at an average of 1,083,875 CFA Franc. These include set-up costs and the costs of tools (see Table 7).

Table 7: Establishment cost of a hectare of Robusta and Arabica coffee

Typical establishment costs of a hectare of coffee trees			
Establishment costs	Unit per hectare (Number of working days)	Unit value (CFA Franc)	Cost per hectare (CFA Franc)
Forest acquisition	All-inclusive		500 000
(i) Land preparation			
Cost of labour			
Land clearance	Flat rate	30 000	30 000
Felling and cutting of large trees	Flat rate	30 000	30 000
Controlled burning	Flat rate	10 000	10 000
Stump removal	10 MD	1 500	15 000
Stake preparation	7 MD	1 500	10 500
Marking and staking out	10 MD	1 500	15 000
(ii) Preparation and planting of seedlings			
Establishment of nurseries	1,200	100	120 000
Hole digging for planting seedlings	1,200	80	96 000
Transport of seedlings	1,200	50	60 000
Planting of seedlings	1,200	20	24 000
Fertilizers	2 bags	30 500*	61 000
Input processing	8 MD	1 500	12 000
Insecticides	5 litres	3 000	15 000
Total set-up costs			998 500

Note: MD = Man/Day cost

Source: NCCB, 2016

*Organic fertilizer prices

3.2 Annual production costs of a mature coffee plantation

Table 8: Cost of production of a mature coffee plantation of one hectare (in CFA Franc)

	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16
A. Cultivation costs						
1. Labour	95 000	95 000	95 000	95 000	95 000	95 000
2. All other costs (e.g. fertilizer, pesticides)	54 000	54 000	54 000	54 000	54 000	54 000
<i>Total cultivation costs</i>	<i>149 000</i>	<i>149 000</i>	<i>149 000</i>	<i>149 000</i>	<i>149 000</i>	<i>149 000</i>
B. Post-harvest costs						
1. Labour	9 556	9 680	9 961	10 200	10 394	10 706
2. All other costs	17 900	17 900	17 900	17 900	17 900	17 900
<i>Total post-harvest costs</i>	<i>27 456</i>	<i>27 580</i>	<i>27 861</i>	<i>28 100</i>	<i>28 294</i>	<i>28 606</i>
C. Financial costs						
1. Interest	0	0	0	0	0	0
<i>Total financial costs</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
D. Fixed costs						
1. All fixed costs (e.g. machinery)	90 000	90 000	90 000	90 000	90 000	90 000
2. Other fixed costs (e.g. insurance)	0	0	0	0	0	0
<i>Total fixed costs</i>	<i>90 000</i>	<i>90 000</i>	<i>90 000</i>	<i>90 000</i>	<i>90 000</i>	<i>90 000</i>
Variable costs (A+B+C)	176 456	176 580	176 861	177 100	177 294	177 606
Total costs (A+B+C+D)	266 456	266 580	266 861	267 100	267 294	267 606
Yields (kg/ha)						
Arabica (green)	150	150	150	150	201	201
Robusta (green)	250	250	250	250	365	365
Type of coffee						
Arabica (green)	9.50%	7.76%	14.46%	8.69%	8.80%	5.88%
Robusta (green)	90.50%	92.24%	85.54%	91.31%	91.20%	94.12%

Source: NCCB 2015.

The average life span of coffee plantations is 20 years

Variable costs represent an average of 66.3% of total costs for the period, a high proportion that highlights the rather disadvantageous operating conditions. The effects of scale are demonstrably insignificant. In addition, while yields are tending to fall, costs appear to be rising moderately and are a cause for concern in a sector that is not very dynamic.

The average production⁴ cost of a kilo of green coffee stands at 562 CFA Franc. This average, however, masks broad differences among regions and holdings. With a standard deviation of 95.82 CFA Franc, the highest production cost amounts to 755 CFA Franc while the lowest stands at 374 CFA Franc.

The average costs per kg in the major production areas are as follows:

- Mifi, West region (Arabica): 502 CFA Franc.
- Mungo, Littoral region (Robusta): 599 CFA Franc.

3.3 Crop losses due to pests and diseases

Coffee in recent decades has not been directly affected by pandemics, though there has been a resurgence of pests such as coffee berry borers and leaf-eating caterpillars.

3.4 Crop losses due to adverse weather

Climate change can affect coffee production and further undermine the economic situation of producing countries. It is currently difficult to assess the impact of climate change on Cameroonian production. The creation of the Climate Observatory will ensure that data is available in the future.

4. FARMERS' INCOME⁵

The share of FOB prices paid to farmers has clearly declined in the last six crop years as shown in Table 9.

Table 9: Average prices paid to Robusta coffee producers (CFA Franc/kg)

Average price per province	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16
West	810	750	725	775	675	543
North-West	775	750	700	750	738	463
South-West	725	700	700	775	675	600
Littoral	795	800	745	663	655	588
East	710	700	695	675	600	475
South	700	650	650	600	600	500
Centre	700	600	650	600	675	538
Average price	745	707	695	691	660	529
Average FOB price	955	915	971	912	940	873
Share of FOB price (%)	78	77.2	71.6	75.8	70.2	60.6

Source: NCCB, CICC.

⁴Bulletin de prospective des filières cacao et café au Cameroun, N°002-2015.

⁵NCCB Study, 2015

As highlighted in Table 9, average prices paid to farmers for Robusta coffee are clearly declining, falling from 745 CFA Franc to 529 CFA Franc per kilogram from 2010/11 to 2015/16, a drop of 6.6%. This decline is continuous and, coupled with the steady increase in production costs referred to above, explains the deterioration in the sector's profitability and thus its increasingly low attractiveness.

The trends identified for Robusta coffee also apply to Arabica, but less intensely.

Table 10: Average prices paid to Arabica coffee producers (CFA Franc/kg)

Average price per province	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16
West	1 300	1 270	1 100	1 250	1 325	975
North-West	1 250	1 275	1 050	1 100	1 000	900
South-West	1 175	1 325	1 150	1 000	1 000	900
Average price	1 242	1 290	1 100	1 117	1 108	925
Average FOB price	2 362	1 799	1 301	1 816	1 624	1 540
Share of FOB price (%)	52.6	71.7	84.5	61.5	68.3	60.1

Source: NCCB, CICC

Following a period of stable annual average prices paid to Arabica coffee producers in the 2012/13, 2013/14 and 2014/15 crop years, prices fell to 925 CFA Franc per kilogram in crop year 2015/16. The annual average fall, however, amounted to 5.71% for the period from 2010/11 to 2015/16.

5. RESEARCH AND EXTENSION

5.1 Research institutions

The Institute for Agricultural Research for Development (IRAD) has the necessary equipment, ensures that technical assistance is permanently available and drives a partnership that helps to enhance the coffee sector in Cameroon.

5.2 Research on climate change and coffee

Research is ensured by the IRAD and the competent departments of the Ministry of the Environment, Nature Protection and Sustainable Development (MINEPDED).

The Cameroon Government has set up a Climate Change Observatory, the duties of which include monitoring and assessing the socio-economic and environmental impacts of measures to prevent, alleviate and adapt to the adverse effects of climate change.

5.3 Organization of extension services

Through the National Programme for Agricultural Extension and Research (PNVRA) and its various branches, the Ministry of Agriculture and Rural Development is responsible for deploying the majority of extension staff on the ground. The number of staff fell significantly during the crisis in the 1990s and the State is now carrying out a major recruitment drive that should resolve the staffing problem in the medium-term.

The programmes introduced by the competent ministries apply and extend the research results obtained. These programmes include:

- The project 'Selection and Distribution of Basic Enhanced Plant Material with Improved Cocoa and Coffee Plantation Productivity' (SDMVCC), led by the Ministry of Scientific Research and Innovation (MINRESI), makes enhanced plant material available.
- The project 'Supporting the Production and Distribution of Cocoa-Coffee Plant Material/Seeding' (PPDMVCC/PSCC) strongly supports the plant production sector in several areas and makes its know-how available to assist in establishing tree nurseries. This project is led by MINADER.
- The project 'Protection against diseases and insects' is excellent thanks to the project 'Cocoa and Coffee Tree Protection' (PPVCC), led by MINADER.
- Finally, the PNVRA ensures extension and organizational services for farmers throughout the plantation management process. This programme is led by MINADER.

6. COFFEE PROCESSING

6.1 Field processing (post-harvest processing)

Type of processing methods (wet or dry):

- Post-harvest operations: generally, by the dry method for Robusta and the wet method for Arabica.
- Processing: in factories owned by farmer cooperatives or by private operators who hold a professional licence.

6.2 Quality control

Quality control at farm level is ensured by cooperative member inspectors who have received training on the physical quality of the product. In addition, since 2010 the NCCB has provided farming organizations with extensive training in the sensory analysis of coffee with the support from the Ministry for Agriculture and Rural Development.

7. STAKEHOLDERS IN THE COFFEE SECTOR

7.1 Private sector

The private sector is overseen by the CICC. According to current regulations, the CICC is consulted on any issues relating to the development, marketing, financing and taxation of product marketing operations. It is formed by four associations (Farmers, Exporters, Processors and Factories/Buyers).

A. Associations

The coffee sector in Cameroon currently has 13 associations which are duly recorded in the register of the CICC as follows: 2 in the East region, 4 in the North-West region, 2 in the Littoral region and 5 in the West region⁶.

B. Coffee producers' cooperatives

According to Law No 92-006 of 14 August 1992 on cooperatives and common interest groups and the Single Act on the law of cooperative societies, OHADA (Organization for the Harmonization of Business Law in Africa), adopted on 15 December 2010 at Lomé and ratified on 15 March 2011, cooperative societies are autonomous associations of persons who join together voluntarily to meet their common aspirations and economic, social and cultural needs by means of a collectively owned enterprise in which power is exercised democratically. Cooperatives are private enterprises that are established by an association of persons whose resources are generally limited but who wish to take calculated risks and share the results of their efforts on an equitable basis.

The people who set up cooperatives take lasting actions concerning democratically chosen investments. Members are co-owners of the cooperative because they:

- Subscribe to one or more shares in cash and/or in kind to allow the vision of the cooperative to be realised.
- Adhere scrupulously to the principles of their cooperative in order to carry out profitable economic activities.
- Prefinance their enterprise by delivering their coffee to the cooperative on the basis of deferred payment.

⁶ CICC, May 2016

Such co-ownership entitles members to use the services offered by the cooperative:

- Distribution of plant material.
- Distribution of inputs.
- Organization of markets.

The cooperative shop is the place where sales operations are in general transacted.

The coffee sector is being rebuilt largely on the basis of the organization of farmers, particularly by means of cooperatives, joined together at national level in two Confederations:

- The National Association of Cocoa and Coffee Producers (ANPCC).
- The National Confederation of Cocoa and Coffee Producers of Cameroon (CONAPROCAM).

7.2 Public sector

A. National coffee authority

According to the regulations, the NCCB is responsible for:

- Statistically monitoring cocoa and coffee marketing seasons.
- Monitoring export product quality control activities.
- Visiting the premises of organizations responsible for the quality control of factories and warehouses with a view to their approval.
- Protecting and promoting the brand image of Cameroon origin.
- Monitoring international cocoa and coffee agreements and representing Cameroon at the International Cocoa Organization and the International Coffee Organization, in cooperation with the inter-trade association.
- Carrying out studies entrusted to it by the Government concerning the cocoa and coffee sectors.

B. Other government involvement

The Ministry of Scientific Research and Innovation carries out research into enhanced varieties through the SDMVCC project.

The Ministry of Agriculture and Rural Development is mainly responsible for organizing extension services concerning agricultural techniques. Various projects focus on the production and distribution of plant material.

The Ministry of Trade is responsible for regulating trade operations.

7.3 Financial institutions

Prior to deregulation, the administration of the sectors conducted by the State allowed actors to benefit from crop credit. With deregulation and in the absence of financial institutions specializing in financing agriculture, the sector's stakeholders adopted a multi-stage *ad hoc* approach as the preferred option.

A. Production financing

Deregulation undermined the cooperative movement, which had provided an alternative solution to production financing problems. All planters, whether large or small, require financing. Unfortunately, however, the Cameroon financial system has yet to find the appropriate formula for financing agriculture and, therefore, coffee growing, despite plans to open an agricultural bank. Farmers require two types of credit:

- Credit to finance production costs and marketing.
- Social credit.

According to a 2014 NCCB survey in the various production areas, farmers cover their needs by means of:

- Their own funds.
- Farmer organizations (cooperatives).
- Support from buyers, who impose a mortgage on the farmer's coffee as a guarantee.

B. Financing of domestic marketing

Buyers finance the costs linked to the purchase, transport and stocking of products by means of their own funds or by bank credit for those who file a deposit accepted by commercial banks. Otherwise they resort to the multinational enterprise they most often represent.

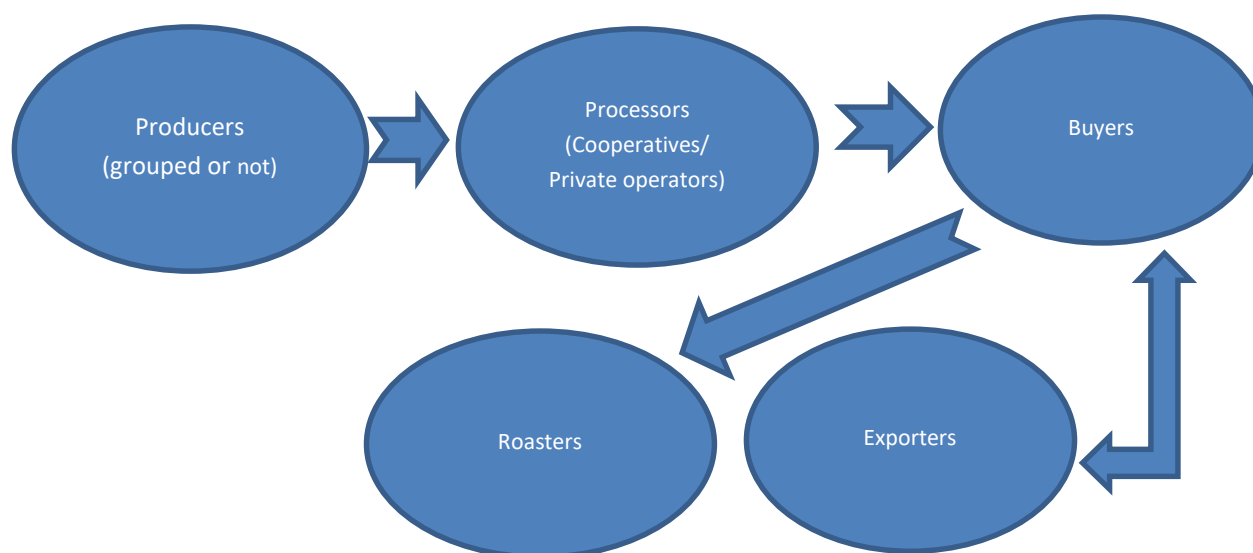
C. *Financing of export operations*

Like domestic marketing, expenditures linked to exports (packaging, containerization, fees, etc.) is financed via exporters' own funds or by bank financing against a guarantee. Otherwise they must resort to the multinational enterprise they represent.

8. MARKETING STRUCTURE

8.1 Marketing channels

Coffee is purchased from farmers after shelling or hulling in homogenous batches, at a price differentiated by type and quality negotiated and jointly agreed. The packaging criteria provided for regulating the packaging and marketing of green coffees must be adhered to.



8.2 Farmer associations/cooperatives exporting coffee

Several green coffee-exporting cooperatives have been listed during recent seasons. These are the UCCAO, the North-West Cooperative Association (NWCA) for the English speaking region, and a cooperative of organic coffee producers created by a non-governmental organization known as UTAMTSI GIC-SONDASON.

8.3 Specification of coffee grades and indicative premiums or discounts

The commercial classification of coffee in Cameroon is determined by the number of defects identified, on the one hand, and by granulometry, on the other. The two procedures are independent of each other for Arabica coffee but are connected in the case of Robusta.

Defects are counted on a final average sample of 300 grammes for all botanical species according to the following scale:

One (1) sour bean	Three (3) defects
One (1) defective bean	Two (2) defects
One (1) large stick	Two (2) defects
Two (2) beans in parchment	One (1) defect
Five (5) spongy, white beans	One (1) defect
Five (5) shells or broken beans	One (1) defect
Five (5) dry beans	One (1) defect
Five (5) undesirable beans	One (1) defect
Ten (10) insect-damaged beans	One (1) defect
One (1) large skin	One (1) defect
Three (3) small skin or parchment	One (1) defect
Three (3) small sticks	One (1) defect
One (1) medium stick	One (1) defect

In addition, except for 'café gragé' (coffee cherries fermented in pure water to enhance the taste of coffee), washed and polished coffees, an exception of 1.25 grammes of stones will be tolerated per final average sample. This tolerance is 1.50 grammes for grade III and 2.50 grammes for 'caracolis'⁷ coffees. Botanical species from Cameroon territory are classified according to the number of defects, in accordance with national standards NC 225 and NC 226, as follows:

- Café gragé (Arabica coffee only).
- Extra-prima, Prima, Superior, Courant coffee for all botanical species, including Arabica.
- Café Limite, except for Liberica.

⁷ A spherical coffee bean, which develops singly in the cherry of the coffee plant where normally there are two, with a flat surface through a central sulcus. The caracolis, also known as peaberries, are very much in demand as they are deemed to have more flavours and aromas than usual grains.

Classification by defect is determined in accordance with the above-mentioned national standards and the number of defects is reduced to the tolerances indicated below for Liberica coffee:

- **Extra-prima:** 8 defects with no sour beans.
- **Prima:** 16 defects with no sour beans.
- **Superior:** 32 defects with no sour beans.
- **Courant:** 64 defects with no more than three sour beans.

Granulometric classification: this is determined by type for Arabica coffees and by grade for Robusta coffees, in accordance with national standards NC 225 and NC 226.

The grade is determined by calibration on a 100 grammes test portion by means of rectangular test screens whose number is defined per 1/64 linear inch, while the diameter of these holes meets the above-mentioned standards.

In addition to the above criteria, certain coffees may receive the supplementary title of 'Caracolis'. In this case, they are composed of at least 85% round or oval beans which have no flats and which generally come from the development of a single fruit ovule.

Table 11: Calibration of different types or grades of coffee and screens by which they are calibrated

Robusta		Arabica	
Grade	Screen	Type	Screen
GG	20	E	20
	18		
GI	18	A	20
	16		18
GII	16	AB	18
	14		17
GIII	14	B	17
	10		
Fragments and sorting	13	C	Caracolis
	10		
		D	16
		N	13

Source: NCCB

8.4 Export taxes and duties levied on coffee

According to the regulation establishing the export duties on green coffee on the account of the NCCB, the CICC and the Cocoa and Coffee Sector Development Fund (FODECC), the deductions by way of duties are as follows:

Table 12: Duty on the export of coffee from Cameroon

	Duty rate per kilo
FODECC	CFA Franc 74
CICC	CFA Franc 10
NCCB	CFA Franc 16

Source: MINCOMMERCE, November 2014

A 10% deduction from these agricultural levies is paid back directly to the public treasury by way of exit fees chargeable on coffee (cf. Finance Act 2017).

9. COFFEE ROASTING AND DOMESTIC CONSUMPTION

Cameroon currently has 16 roasters whose activities are subject to the regulation establishing the general conditions for marketing Arabica and Robusta coffees. According to these provisions, a monthly declaration of tonnages of green coffees purchased by factories or exporters must be submitted to the NCCB, the CICC and to regional authorities and departmental trade representatives, indicating the tonnages sold, the nature of the products and their destination in the case of exports.

The regulation also provides for local processing units to pay taxes and levies in accordance with the regulations in force. The revitalization policy which seeks to promote local processing, however, currently exempts them from such charges.

9.1 Roasters and market size

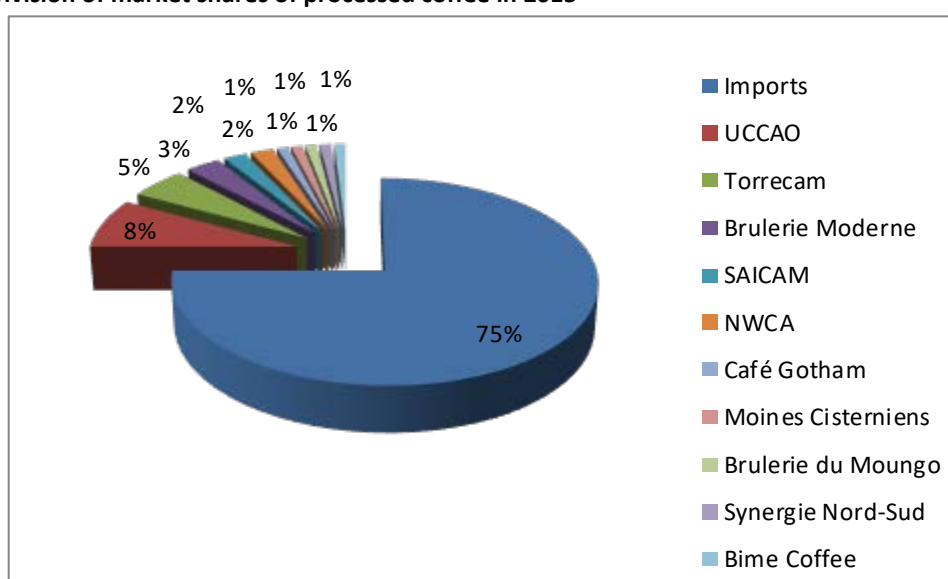
Coffees are processed locally by 16 roasters operating throughout national territory, concentrated in the towns of Douala, the economic capital, and Nkongsamba (a bastion for Robusta). The main roasters are the UCCAO, Brûleries modernes and Pierre Andrée coffees. Most processed coffee is exported to Nigeria, Chad, Sudan and other countries in North Africa, Europe and even North America.

Some 3,786 tonnes of coffee were roasted during crop year 2015/16 (2,070 tonnes of Robusta, 1,716 tonnes of Arabica). This volume is eight times higher than crop year 2014/15. This impressive leap is due to the increasing number of domestic consumption promotional campaigns introduced by the Minister of Trade and apex structures of the sector.

This activity is very buoyant due to strong demand in national and sub-regional markets. Cameroon is using its plan to revitalize the coffee sector to develop strategies to improve the organization of local processing, such as: promotion of artisanal processing, capacity-building, exemption from levies on roasted coffee, granting of incentives to investors involved in processing, protection of the local industry to attract foreign investors and the introduction of product standards arising out of artisan processing.

The market share of the 10 largest roasters in Cameroon is indicated in Figure 6.

Figure 6: Division of market shares of processed coffee in 2015

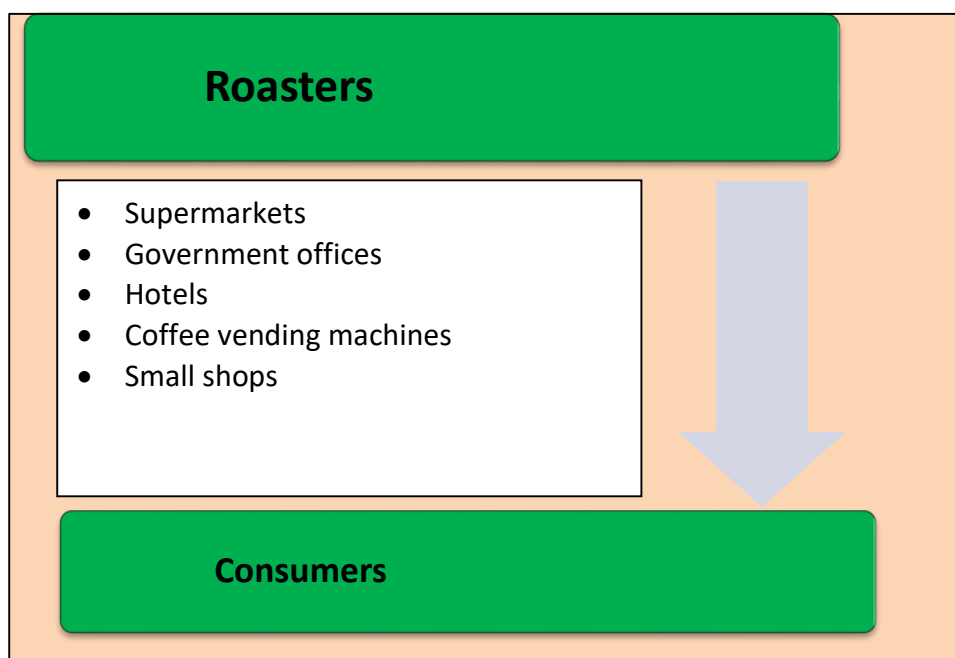


Source NCCB, Data GPAC, 2015

The roasted coffee market is developing favourably in Cameroon, as an increasing demand for coffee is observed in public offices, private companies and households. This is a move to make coffee consumption part of national culture.

9.2 Distribution channels

Though coffee consumption in Cameroon is not a widespread habit, local consumption is increasingly promoted through the presence on the market of around 30 brands of roasted or ground coffee that households and some government offices are buying on a regular basis. Processors equipped with automatic coffee dispenser technology have monopolized almost 75% of consumption in the major population centres.

Figure 7: Coffee distribution channel

Source: NCCB, 2016

9.3 Domestic consumption

Table 13 shows domestic consumption of coffee for the last six crop years.

Table 13: Estimates of domestic coffee consumption
(in thousand 60-kg bags)

	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	Average
Production	439	635	269	547	398	409	449.5
Domestic consumption	68	70	72	73	75	79	72.8
Consumption as % of production	15	11	27	13	19	19	17

Source: NCCB, 2016

Although increasing (3.04% p.a.) in step with the increase in local roasters, domestic consumption is still low compared to output. Average annual consumption over the last six years is 72,800 bags, which represents 17% of total production.

10. PERFORMANCE OF COFFEE EXPORTS DURING THE LAST FIVE YEARS

10.1 Exports of green coffee (Arabica)

Arabica coffee produced in Cameroon is exported to a number of destinations. Table 14 shows the situation from 2010/11 to 2014/15. Arabica coffee exports in crop year 2015/16 totalled 42,821 60-kg bags, an increase of 17% compared to crop year 2014/15.

Table 14: Exports of green coffee (Arabica) by destination during crop years 2010/11 to 2014/15

Destination	Volume (60-kg bags)					Share (%)				
	2010/11	2011/12	2012/13	2013/14	2014/15	2010/11	2011/12	2012/13	2013/14	2014/15
Africa	0	600	900	320	0	0.0	1.5	2.1	0.9	0.0
Algeria	0	0	300	0	0	0.0	0.0	0.7	0.0	0.0
South Africa	0	300	600	320	0	0.0	0.8	1.4	0.9	0.0
Tunisia	0	300	0	0	0	0.0	0.8	0.0	0.0	0.0
Asia & Oceania	500	660	2 115	760	814	1.3	1.7	5.0	2.1	2.2
China	0	0	0	0	83	0.0	0.0	0.0	0.0	0.2
Israel	0	0	550	0	0	0.0	0.0	1.3	0.0	0.0
Japan	500	360	665	760	431	1.3	0.9	1.6	2.1	1.2
Malaysia	0	0	900	0	300	0.0	0.0	2.1	0.0	0.8
Vietnam	0	300	0	0	0	0.0	0.8	0.0	0.0	0.0
Central America & Mexico	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Europe	37 940	33 027	37 684	28 054	32 563	95.2	83.3	89.9	77.8	89.0
Belgium	7 400	8 140	4 940	2 750	8 246	18.6	20.5	11.8	7.6	22.5
Denmark	1 500	0	0	0	0	3.8	0.0	0.0	0.0	0.0
Finland	2 500	0	0	0	0	6.3	0.0	0.0	0.0	0.0
France	1 500	1 070	1 289	1 311	2 407	3.8	2.7	3.1	3.6	6.6
Germany	17 983	16 917	23 935	9 181	11 986	45.1	42.7	57.1	25.4	32.8
Greece	0	300	0	0	0	0.0	0.8	0.0	0.0	0.0
Italy	1 207	300	1 220	1 612	300	3.0	0.8	2.9	4.5	0.8
Netherlands	0	0	0	0	80	0.0	0.0	0.0	0.0	0.2
Portugal	300	300	1 200	5 520	0	0.8	0.8	2.9	15.3	0.0
Russian Federation	3 750	6 000	5 100	7 680	9 544	9.4	15.1	12.2	21.3	26.1
Spain	300	0	0	0	0	0.8	0.0	0.0	0.0	0.0
United Kingdom	1 500	0	0	0	0	3.8	0.0	0.0	0.0	0.0
North America	1 400	5 376	1 200	6 947	3 218	3.5	13.6	2.9	19.3	8.8
Canada	0	0	0	447	0	0.0	0.0	0.0	1.2	0.0
USA	1 400	5 376	1 200	6 500	3 218	3.5	13.6	2.9	18.0	8.8
South America	0	0	0	0	0	0.0	0.0	0.0	0.0	0.0
Total	39 840	39 663	41 899	36 081	36 595	100	100	100	100	100

Source: NCCB, 2016

During crop years 2010/11 to 2014/15, on average 87% of Arabica coffee production in Cameroon was exported to Europe. Germany, Belgium and the Russian Federation are the main destinations with 40.6%, 16.9% and 16% respectively of the total exports.

10.2 Exports of green coffee (Robusta)

During crop years 2010/11 to 2014/15 Robusta coffee was exported to 33 destinations as illustrated in Table 15.

Table 15: Exports of green coffee (Robusta) by destination during crop years 2010/11 to 2014/15

Destination	Volume (60-kg bags)					Share(%)				
	2010/11	2011/12	2012/13	2013/14	2014/15	2010/11	2011/12	2012/13	2013/14	2014/15
Africa	60 427	40 521	5 700	11 062	53 420	11.90	7.10	2.30	3.40	14.90
Algeria	44 821	11 700	3 000	6 862	12 600	8.80	2.10	1.20	2.10	3.50
Côte d'Ivoire	0	0	0	3 000	13 200	0.00	0.00	0.00	0.90	3.70
Egypt	6 666	4 920	0	0	320	1.30	0.90	0.00	0.00	0.10
Morocco	3 300	8 901	2 400	1 200	5 700	0.70	1.60	1.00	0.40	1.60
South Africa	0	0	300	0	0	0.00	0.00	0.10	0.00	0.00
Tunisia	5 640	15 000	0	0	21 600	1.10	2.60	0.00	0.00	6.00
Asia & Oceania	2 263	4 500	2 256	0	12 800	0.40	0.80	0.90	0.00	3.60
China	1 980	0	1 200	0	0	0.40	0.00	0.50	0.00	0.00
Indonesia	0	300	0	0	0	0.00	0.10	0.00	0.00	0.00
Israel	0	600	0	0	0	0.00	0.10	0.00	0.00	0.00
Japan	283	0	300	0	0	0.10	0.00	0.10	0.00	0.00
Jordan	0	0	0	0	12 800	0.00	0.00	0.00	0.00	3.60
Malaysia	0	0	142	0	0	0.00	0.00	0.10	0.00	0.00
Vietnam	0	3 600	614	0	0	0.00	0.60	0.30	0.00	0.00
Europe	440 083	418 638	227 260	305 131	288 126	86.90	73.70	92.70	92.90	80.50
Belgium	105 954	29 350	10 500	20 498	76 616	20.90	5.20	4.30	6.20	21.40
Croatia	0	2 400	600	0	0	0.00	0.40	0.20	0.00	0.00
Denmark	5 750	900	0	0	0	1.10	0.20	0.00	0.00	0.00
France	25 097	55 656	32 870	97 269	78 724	5.00	9.80	13.40	29.60	22.00
Georgia	0	1 200	0	0	0	0.00	0.20	0.00	0.00	0.00
Germany	21 912	17 899	19 100	13 563	36 133	4.30	3.20	7.80	4.10	10.10
Greece	1 860	8 060	900	1 827	2 700	0.40	1.40	0.40	0.60	0.80
Italy	106 864	182 708	77 700	90 452	31 200	21.10	32.20	31.70	27.50	8.70
Netherlands	82 470	0	0	0	0	16.30	0.00	0.00	0.00	0.00
Poland	1 600	4 720	960	0	0	0.30	0.80	0.40	0.00	0.00
Portugal	73 571	77 580	62 430	58 289	49 500	14.50	13.70	25.50	17.70	13.80
Romania	300	0	0	0	0	0.10	0.00	0.00	0.00	0.00
United Kingdom	0	0	0	500	0	0.00	0.00	0.00	0.20	0.00
Russian Federation	9 505	13 002	14 400	2 400	2 753	1.90	2.30	5.90	0.70	0.80
Serbia	0	1 800	3 900	1 200	0	0.00	0.30	1.60	0.40	0.00
Spain	5 200	17 963	0	16 433	10 200	1.00	3.20	0.00	5.00	2.80
Switzerland	0	600	0	600	0	0.00	0.10	0.00	0.20	0.00
Former Yugoslavia	0	4 800	3 900	2 100	300	0.00	0.80	1.60	0.60	0.10
North America	3 897	104 217	9 900	12 200	3 600	0.80	18.40	4.00	3.70	1.00
Canada	0	0	0	50	0	0.00	0.00	0.00	0.00	0.00
USA	3 897	104 217	9 900	12 150	3 600	0.80	18.40	4.00	3.70	1.00
Total	506 670	567 876	245 116	328 393	357 946	100.00	100.00	100.00	100.00	100.00

Source: NCCB, 2016

Robusta coffee exports in crop year 2015/16 amounted to 418,514 60-kg bags, an increase of 16.9% compared to 2014/15. From 2010/11 to 2014/15, Europe continued to be the main destination for Robusta coffee, with an average of 85.5% of sales, while Italy, France and Portugal jointly accounted for an average of 57% of total exports.

10.3 Delivery time

Under Cameroonian regulations, quality reports are valid for 30 days. Containerization must be carried out during that period.

10.4 Exports of certified coffee

Operators in Cameroon no longer produce certified coffee.

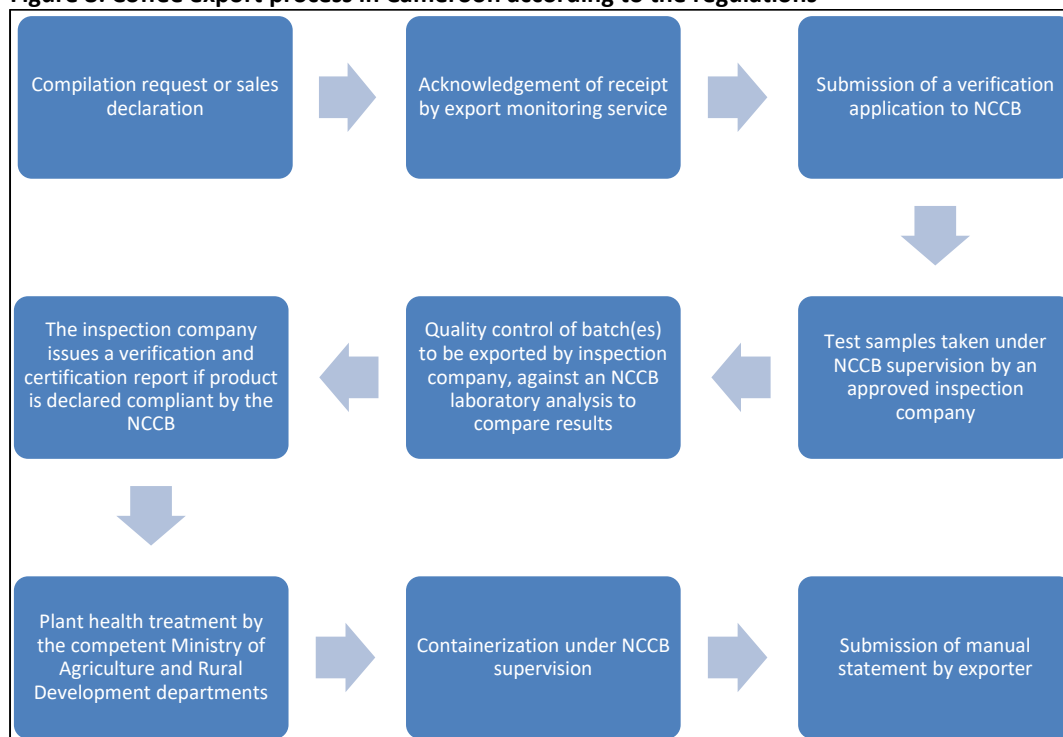
11. REGULATIONS

11.1 Export regulations

Coffee exports in Cameroon are governed by:

- Law No 2004/025 of 30 December 2004 amending and completing Law No 95/11 of 27 July 1995 on the organization of the cocoa and coffee trade.
- Decree No 2005/1213/PM of 27 April 2005 on the packaging and marketing of green coffee.
- Order No 0002/MINCOMMERCE/CAB of 20 January 2016 establishing the general conditions for marketing Arabica and Robusta coffee.
- Circular crop year letters published each year.

Export operations follow the process shown in Figure 8.

Figure 8: Coffee export process in Cameroon according to the regulations

Source: NCCB, 2016

11.2 Regulations related to quality standards

Subject to the regulations, Cameroon establishes protection systems that are designed to ensure product quality and safety and the durability of the coffee sector. These include:

- National standard NC 225: commercial specifications and qualitative classification of coffee beans.
- Standard NC 226: microscopic examination and determination of defects in green coffee.
- Standard NC 227: visual and olfactory examination of coffee beans.
- Standard NC 228: packaging of coffee beans and labelling of the bags.
- Standard NC 229: practical assessment for the determination of water content of coffee beans.
- Standard NC 230: coffee bean sampling.

To ensure its sovereign duty of controlling the quality of coffee, the State relies on private companies that carry out this task on a day-to-day basis for coffee intended for export. Under the supervision of the NCCB, the role of these eight quality control companies is to inspect and control coffees for export in accordance with the specifications. These companies are brought together in a collective body whose overall aim is to ensure that high technical standards are maintained.

12. MACROECONOMIC ASPECTS OF THE COFFEE SECTOR

12.1 Coffee and trade balance

Coffee is an important source of foreign currency for the economy of Cameroon. Table 16 shows the development of export revenue and the shares of coffee in exports between 2010 and 2014.

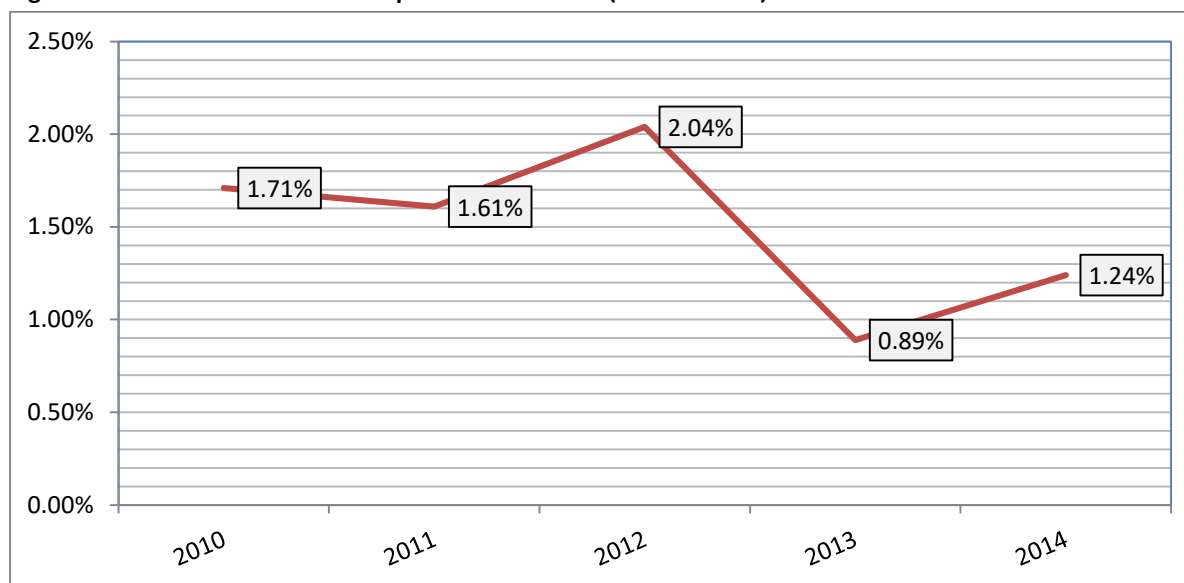
Table 16: Share of coffee in total exports in Cameroon (2010 to 2014)
(in thousand US\$)

Years	Coffee	Total exports	Share (%) of coffee in exports
2010	32 976	1 924 213	1.71
2011	34 321	2 133 608	1.61
2012	44 565	2 182 449	2.04
2013	19 844	2 230 681	0.89
2014	31 668	2 557 858	1.24

Source: NIS, 2015

The share of coffee in total exports varied from 0.89% to 2.04% in the same period.

Figure 9: Share of coffee in total exports in Cameroon (2010 to 2014)



Source: NIS, 2015

The share of coffee in the export revenues of Cameroon remains residual. Thus, between 2010 and 2014, the average share was 1.5%.

12.2 Share of coffee in GDP

Coffee contributes to the creation of added value for the national economy. Table 17 illustrates the share of coffee in GDP between 2010 and 2015.

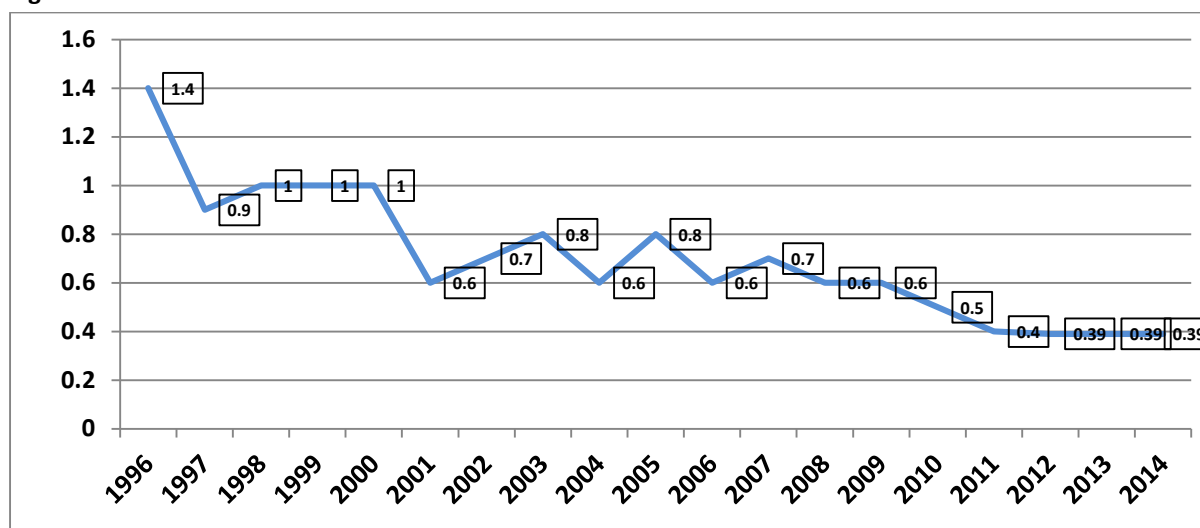
Table 17: Coffee and gross domestic product (GDP)

	2010	2011	2012	2013	2014	2015
National GDP (US\$ millions)	23 623	26 588	26 473	29 568	32 050	28 422
Agricultural GDP (US\$ millions)	5 526	6 267	6 136	6 765	7 102	6 324
GDP from coffee (US\$ millions)	114	104	103	114	125	91
Share of Agriculture in National GDP	23.4%	23.6%	23.2%	22.9%	22.2%	22.3%
Share of coffee in National GDP	0.48%	0.39%	0.39%	0.39%	0.39%	0.32%
Share of coffee in Agricultural GDP	2.1%	1.7%	1.7%	1.7%	1.8%	1.4%

Source: NIS, 2016

The share of coffee in GDP amounts to between 0.32% and 0.48% over the last six years as shown in Figure 10.

Figure 10: Share of coffee in GDP in Cameroon from 1996 to 2015



Source: NIS

Figure 10 also shows the bearish trend of the share of coffee in the GDP.

12.3 Employment generated by the coffee sector

Coffee-related activities in Cameroon occupy directly, or indirectly, 423,000 households involving around 2,961,000 people. Production activity accounts for 94.6% of the jobs created in the sector, compared to factory work with only 2.4%, marketing with 2.4%, processing and distribution with 0.2%, quality control and plant health treatment with 0.2% and ancillary services (transport, loading and unloading, and transit) with 0.2% as shown in Figure 11.

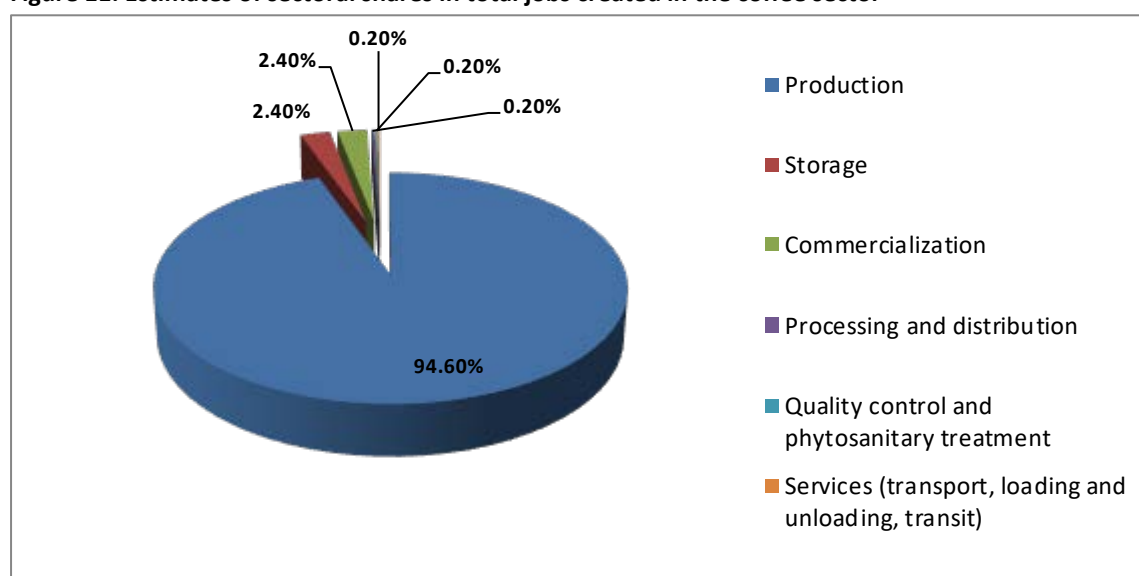
Table 18: Estimates of employment in the coffee sector in Cameroon

Sector	Household population employed directly or indirectly	Number of persons in households
Production	400 000	2 800 000
Factories	10 000	70 000
Commercialization	10 000	70 000
Processing and distribution	1 000	7 000
Quality control and plant health treatment	1 000	7 000
Ancillary services (transport, loading and unloading, transit)	1 000	7 000
Total	423 000	2 961 000

Source: *Coffee sector development strategy in Cameroon, 2009*

The coffee sector is an important generator of employment in Cameroon: it is estimated that around 3,000,000 people earn a living from coffee.

Figure 11: Estimates of sectoral shares in total jobs created in the coffee sector



Source: *Coffee and cocoa sectors development strategy, 2009*

13. ENVIRONMENTAL CHALLENGES

13.1 Impact of coffee production on the environment

Coffee growing in Cameroon dates back to around 1884, in the colonial era. Increases in production were due mainly to the regeneration of old plantations. Farmers moreover use fewer pesticides because of their high costs. In the case of washed coffee, the current system involves individual depulping, which has developed into a group system that consumes a great deal of water. A project to introduce compact washing plants introduced in 2009 enables water consumption to be reduced by around 80% to 90% in comparison with traditional washing stations.

13.2 Contribution to carbon footprint

As in many coffee-producing countries, some of the waste produced from coffee processing in Cameroon (pulp, parchment) is sometimes burnt or disposed of in rivers. The Government, however, has decided to produce fertilizers from waste materials. The pertinent regulations are currently being drafted.

13.3 Environmentally sustainable coffee production

The Cameroon Cocoa and Coffee Sector Revitalization and Development Plan (for 2020) recommends the promotion of the application of sustainable agricultural practices. The provision of pest and disease resistant high-yield plant material with a shorter production cycle will contribute effectively to reducing the use of plant protection products. The extension of good practices throughout the value chain undertaken with foreign partners involves many forms of training focusing in particular on:

- Good production practices.
- Good use of plant protection products by way of waste management and environmental protection.

With respect to the quality of plant protection products, the Ministry of Agriculture and Rural Development publicizes annually a list of approved products and ensures compliance with the regulations governing their marketing and use.

14. PROSPECTS FOR COFFEE PRODUCTION

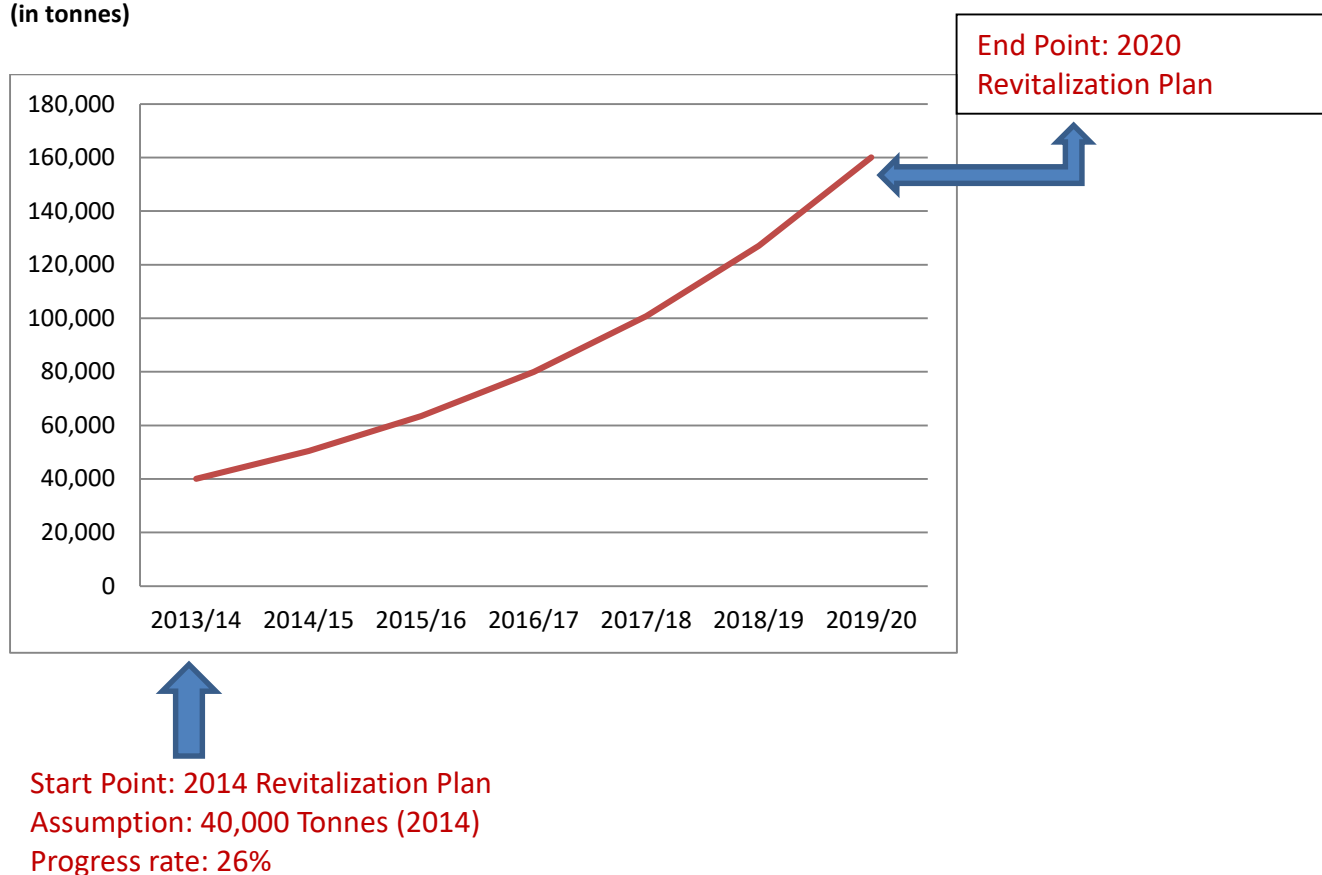
14.1 Coffee production targets in Cameroon

The Cameroon Cocoa and Coffee Sector Revitalization and Development Plan (for 2020), adopted on 30 September 2014, set coffee production targets to be achieved by 2020. These stand at 125,000 tonnes of Robusta coffee and 35,000 tonnes of Arabica.

Numerous measures and actions are foreseen to meet these targets in the areas of production, quality, marketing, processing, consumption, promotion and research and development.

Figure 12 shows the development and prospects for coffee production in Cameroon since 2014.

Figure 12: Outlook for development of coffee production in Cameroon from crop years 2013/14 to 2019/20 (in tonnes)



LIST OF ACRONYMS

ANPCC	National Association of Cocoa and Coffee Producers
CFA Franc	Franc CFA (African Financial Community)
CICC	Interprofessional Cocoa and Coffee Council
CONAPROCAM	National Confederation of Cocoa and Coffee Producers of Cameroon
FODECC	Cocoa and Coffee Sector Development Fund
GDP	Gross Domestic Product
ICC	International Coffee Council
IRAD	Institute for Agricultural Research for Development
MINADER	Ministry of Agriculture and Rural Development
MINRESI	Ministry of Scientific Research and Innovation
NCCB	National Cocoa and Coffee Board
NIS	National Institute of Statistics
NWCA	North-West Cooperative Association
OHADA	Organization for the Harmonization of Business Law in Africa
ONCPB	National Marketing Office for Primary Commodities
PNVRA	National Programme for Agricultural Extension and Research
PPDMVCC/PSCC	Project Supporting the Production and Distribution of Cocoa-Coffee Plant Material/Seedling Project
PPVCC	Cocoa and Coffee Tree Protection Project
PRDFCC	The Coffee Sector Revitalization and Development Plan
SDMVCC	Selection and Distribution of Basic Enhanced Plant Material with Improved Cocoa and Coffee Plantation Productivity
UCCAO	Central Union of Agricultural Cooperatives

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