



**INTERNATIONAL
COFFEE
ORGANIZATION**

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**Interim report on the progress of the
Structured Coffee Sector Dialogue**

The Executive Director presents his compliments and for the information of Members, observers and members of the Private Sector Consultative Board attaches an interim report on the progress of the Structured Coffee Sector Dialogue.



**INTERNATIONAL
COFFEE
ORGANIZATION**

Structured Coffee Sector Dialogue

Proceedings of ICO consultative events March-June 2019

July 2019

**SUSTAINABLE
DEVELOPMENT GOALS**

ED-2309/19

Acknowledgements

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At a glance

The coffee sector faces a dramatic prices crisis...

Today coffee prices are more than 30% below the average of the last ten years, with millions of farmers in the developing world struggling to cover their production costs.

...putting the progress towards achieving the Sustainable Development Goals at risk...

The economic and social consequences of price levels for producing countries can be severe and include increasing poverty rates, social unrest, migration and a switch to the cultivation of illicit crops.

...and threatening future supply.

A dramatic cut in investment in the maintenance and modernization of coffee farms could reduce future supply, with a loss in diversity of origins, thereby increasing the global coffee sector's vulnerability to severe market and climate shocks.

In response, the ICO launched a sector-wide dialogue...

The objective is to identify solutions to address the price crisis and achieve long-term sustainability, and to build consensus on implementing key recommendations through concrete actions and a road map.

... a series of 5 global consultative events...

Together with its partners the ICO organized a series of consultative events in importing as well as exporting countries and at the United Nations.

...with contributions from more than 80 experts and industry representatives...

14 expert panels, workshops and seminars provided the forum for rigorous analysis of the root causes of the coffee price crisis and ways to address it.

...involving over 2,000 sector stakeholders...

A broad range of sector stakeholders, including growers, roasters, traders, industry bodies, governments, international organisations, NGOs, and academia shared their views and voiced their opinions.

... to identify solutions...

The set of solutions derived from the consultative events will be further reviewed in one-on-one consultations with key sector stakeholders and ICO Members leading up to the CEO & Global Leaders Forum.

... that will be considered by all stakeholders at the CEO and Global Leaders Forum...

The Sector Dialogue will culminate in the CEO & Global Leaders Forum that will take place on 23 September in London during the week of the 125th Session of the International Coffee Council.

... to effect change and foster a sustainable coffee sector.

The decisions of the Forum will be set out in a formal declaration with concrete actions, identified targets and road map that will be supported by all participants in the Sector Dialogue, and submitted to the International Coffee Council, where all ICO Member governments will be also invited to endorse it and to earmark resources for its implementation.

The coffee price crisis threatens livelihoods of growers and the sustainability of the sector and...

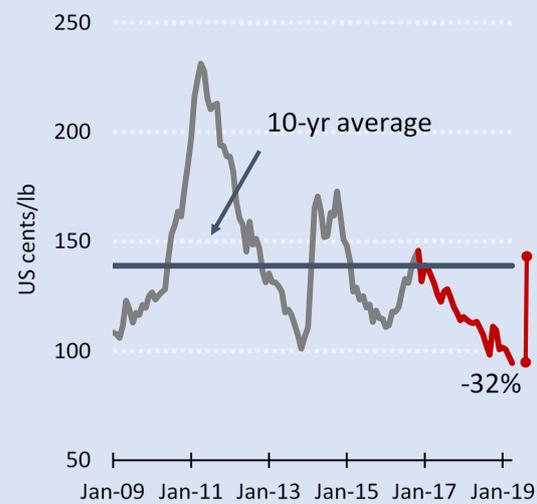
Volatile market prices are inherent to the coffee market. Yet, since 2016, the coffee market has experienced a continued downward trend. In the past 12 months, coffee prices were more than 30% below the average of the previous decade (Figure 1).

Many of the over 12 million coffee farms worldwide struggle to cover their operating costs, while prices decrease, input, compliance and transaction costs rise. As a result, farm incomes decline and the livelihoods of coffee-producing households, the majority of which are smallholders in low- and middle-income countries, are increasingly at risk.

Low coffee prices have severe economic and social consequences. Poverty is reported to have increased in coffee-producing areas with smallholders and female growers being particularly affected. Low prices are also correlated with increased risk of the worst forms of child labour. Future supply is threatened by reduced use of inputs and lack of long-term investment in the maintenance and modernization of coffee plantations, increasing the risk of pests and diseases spreading across coffee areas and leaving growers more exposed to the impact of climate change.

This situation poses a grave risk to the sustainability of the coffee sector as well as to future supply. If no action is taken, the coffee sector will not be able to make its critical contribution to achieving the Sustainable Development Goals. Instead, progress made previously could be jeopardized or reversed.

Figure 1: Coffee prices dropped by 32%
(monthly ICO composite indicator price)



Source: ICO

...requires new solutions and commitment from all sector stakeholders.

Hence, joint action is needed by all stakeholders in the sector, including farmers, traders, roasters, consumers, governments, academia and research institutions, as well as development partners, to identify solutions that help to alleviate the short-term impact of low prices and to put the coffee sector on a positive development and sustainability trajectory.

In response to this critical situation, the International Coffee Council (ICC) adopted Resolution 465 at its 122nd Session in September 2018, in order to address the impact of low prices on the livelihoods of coffee farmers. This Resolution provides the ICO with a strong mandate to respond to current coffee price levels through independent economic research on the causes and impacts of the market situation and by calling on sector stakeholders to work together on solutions to mitigate the impact of low prices as well as to address long-term sustainability challenges.

The ICO Sector Dialogue...

In March 2019, at its 124th Session, the ICC launched the ICO Structured Sector Dialogue, a stakeholder consultation process engaging all the links in the coffee value chain, as well as the international community and civil society.

In view of the impact of price levels and volatility on coffee producers in the short and medium term, as well as the long-term challenges faced by the sector, the objective of the Sector Dialogue is to:

- i. **Identify transformational solutions** that can be implemented jointly by coffee growers and other stakeholders to address price levels and promote the long-term sustainability of the coffee sector, and
- ii. **Foster commitments by ICO Member governments and coffee value chain actors** to support the implementation of recommended solutions.

The Sector Dialogue is a two-stage process:

Phase 1 'Identifying solutions' (March-June 2019) comprised a series of five consultative events that were organized in partnership and with the support of Member countries, the coffee industry and the international development community.

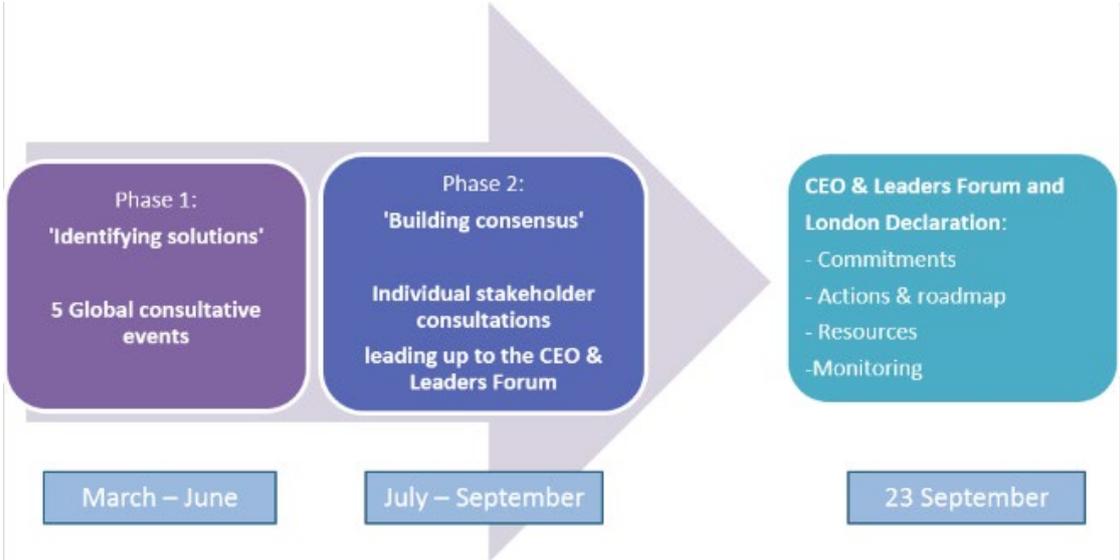
Participants in these consultative events assessed the sustainability challenges faced by coffee stakeholders and identified actionable solutions based on best practices that are scalable as well as new and innovative approaches, while also learning from solutions developed in other similar commodities.

In **Phase 2** 'Building consensus' (July-September 2019) the set of solutions identified previously will be reviewed individually with key stakeholders in order to build a common ground on which actions to prioritize, map individual responsibilities for industry, governments and other stakeholders and identify areas for collaboration between actors and resources. This process is supported by the German Federal Ministry for Economic Cooperation and Development (BMZ).

...culminates in the CEO & Global Leaders Forum (CGLF).

The CEO & Global Leaders Forum involving industry leaders and top policy makers will be held on 23 September as part of the 125th Session of the International Coffee Council in London, where a joint declaration of intent with concrete actions and a roadmap as well as initial earmarking of resources for implementation will be agreed on and signed.

Figure 2: Effecting change through the Sector Dialogue. Five consultative events followed by individual stakeholder consultations leading up to the CEO & Leaders Forum and resulting in the London Declaration



The Sector Dialogue involves a broad range of stakeholders...

A critical factor for the success of the Sector Dialogue and the legitimacy of the outcome is the engagement of a broad set of experts and stakeholders in a transparent and open process (Figure 3).

More than 80 coffee sector and development experts joined the debates, while over 2,000 participants from both the private and public sectors, including representatives from governments, producer associations, coffee traders and roasters, sector organizations, research institutes and NGOs, took part in the dialogue (Annex 1 and 2 contain the list of experts, and represented countries and organizations, respectively).

Figure 3: Stakeholder groups in the Sector Dialogue



ICO Members, i.e. exporting and importing countries were fully involved throughout the process. The Member countries participating in the event represented around 95% of global coffee exports and more than half of imports.

Coffee growers participated and voiced their opinion individually and through several producer associations such as the Brazilian National Coffee Council (CNC), the National Federation of Colombian Coffee Growers (FNC), and Kenya's Coffee Producers Association.

Industry representation covered both large- and medium-sized traders, such as Neumann Kaffee Gruppe, Volcafé and Sucafina, as well as roasters, including Nestlé, JDE, Lavazza, Starbucks, Illy, among others.

Industry bodies, associations, sustainability initiatives and platforms were actively involved in the Dialogue, including the European Coffee Federation (ECF), National Coffee Association USA (NCA), Global Coffee Platform (GCP) and Sustainable Coffee Challenge (SCC), among others.

Voluntary sustainability standard organizations participating in the dialogue were Rainforest Alliance/Utz, 4C and Fairtrade.

International organizations collaborating with the ICO in the Sector Dialogue included FAO, IFAD, UNIDO, ITC and UNDESA.

Research and development institutions included world-class universities, such as the London School of Economics and Columbia University, as well as public and private research institutions (CIAT, World Coffee Research) and independent experts.

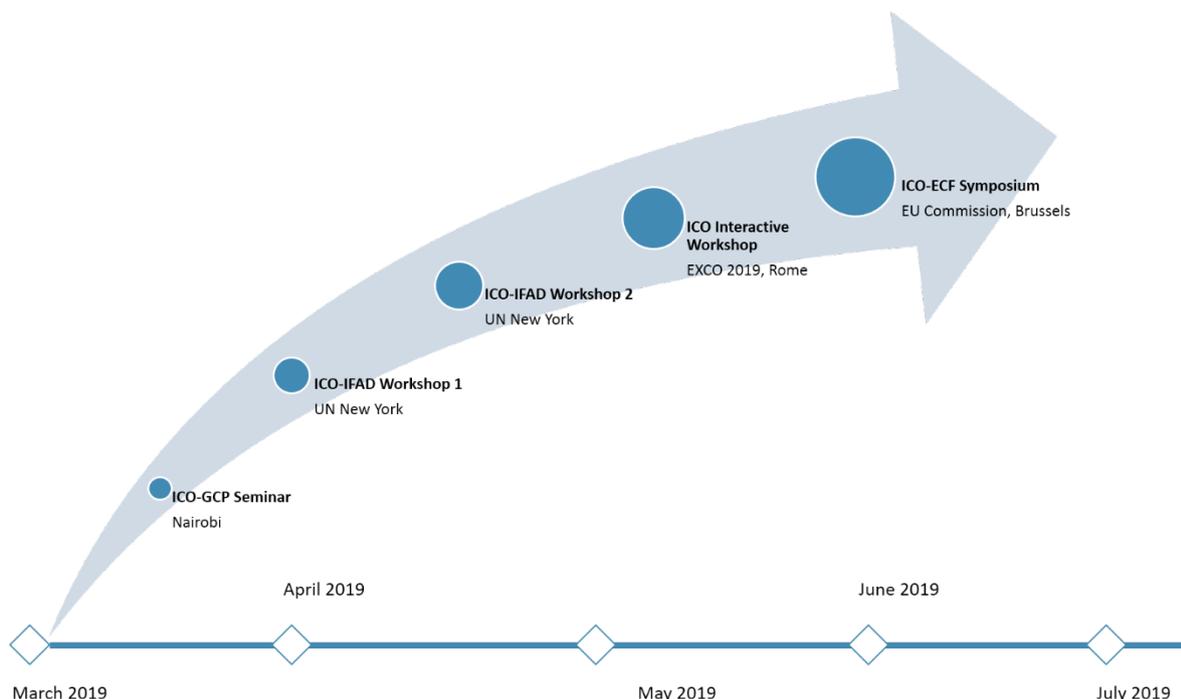
NGOs and civil society were represented by Conservation International, HIVOS and IDH the Sustainable Trade Initiative, among others.

...in an open and inclusive consultation process...

The first phase of the structured sector-wide dialogue comprised a stakeholder consultative process with five global consultative events organized by the ICO with support of its partners and held both in coffee exporting and importing countries:

- a) **Sustainability Seminar, Nairobi** (25 March 2019), in cooperation with the Global Coffee Platform (GCP) and the Government of Kenya.

Figure 4: Global consultative events with more than 80 coffee and development experts and 2,000 participants



b) **Consultative event at the United Nations in New York** (16 April 2019), as part of the SDG Investment Fair, in cooperation with IFAD/SAFIN and with support from the NCA.

c) **Workshop at the United Nations in New York** (16 April 2019), a side event of the UN-DESA Finance for Development Forum, in cooperation with IFAD/SAFIN.

d) **Interactive Workshop, as part of the EXCO 2019 Development Fair in Rome** (16 May 2019) in cooperation with the Italian Ministry of Foreign Affairs and International Cooperation, as well as IFAD, FAO and UNIDO.

e) **Symposium on ‘Meeting the SDGs: Challenges for the Coffee Value Chain’, Brussels** (6 June 2019), organized in partnership with the European Coffee Federation (ECF) and hosted by the European Commission (EC).¹

...to analyse causes of coffee price crisis and to identify solutions.

Coffee sector experts participating in the consultative events discussed root causes of the coffee price crisis and identified the following key areas in which growers, industry, donors, development partners, financial and research institutions should work together to agree, fund and implement shared solutions:

Sustainable livelihoods of coffee producers

- The majority of the 12 million coffee households are smallholders. In some producing regions up to 50% of producers are unprofitable at current price levels.
- Extreme poverty in the value chain becomes more widespread with knock-on effects on the

¹ The video recording of the symposium can be accessed at: <https://webcast.ec.europa.eu/price-levels-and-volatility-towards-a-sustainable-path-for-the-future-of-coffee>

prevalence of the worst forms of child labour, switching to illicit crops, and migration, amplifying the crisis of the sector into a 'global moral issue'.

- Increasing the profitability of coffee production is a key strategy to improve livelihoods. However, diversification of farm and non-farm activities can help to supplement income from coffee production and provide natural hedging against coffee price volatility.
- Income transfer (decoupled from production) to alleviate extreme poverty in the value chain, funded by sector stakeholders, can buffer price shocks and help marginal producers to transition into other income-generating activities.
- The living income concept should be considered in relation to coffee price levels.
- Gender equality needs to be fostered and opportunities provided for rural youth to put the coffee sector on a sustainable path for the future.

Strengthening the economic viability of coffee production

- Many producing regions have a great potential to increase productivity by focusing on higher quality, efficiency of production and reduction of costs.
- Access to finance and risk management tools needs to be strengthened, especially for smallholders. Various international organizations (e.g. IFAD, UNIDO) are in the process of piloting or expanding innovative schemes for risk sharing and to improve access to formal hedging in the futures market.
- De-commoditization of coffee through production of higher quality and differentiation of origins (introduction of geographical indicators) can help achieve higher prices and increase value addition in producing countries.
- Schemes with guaranteed floor prices can help to mitigate price shocks while living income

price premiums can increase farm profitability, thereby helping to close the living income gap.

- Some countries (e.g. Brazil) operate supply management schemes with the objective of stabilizing prices. Retaining coffee for a limited amount of time may take pressure off the market but can be costly.
- Identifying alternative uses for low grade coffee as well as opportunities for circular economy approaches (use of waste and by-products).

Efficient and fair supply chains

- Supply chains are inefficient in many producing countries. Streamlining (including reducing transaction and logistics costs, cutting out middlemen) can increase the share of world market prices transmitted to growers.
- Increasing concentration on the buyer side could lead to deteriorating contract terms for farmers selling their coffee (e.g. payment terms).
- Recent research shows that the value distribution in the coffee market is skewed towards downstream market actors, hampering the ability of farmers to benefit from a growing coffee market (in value terms).

Functioning of futures exchanges

- International futures exchanges, such as ICE, provide important price discovery and hedging functions to the market.
- Some sector stakeholders are concerned about the efficient functioning of futures markets, in particular the impact of increasing activities of non-commercial traders on price discovery functions. Although market fundamentals generally prevail, research results suggest at least a short-term impact of speculation on price movements.

Market transparency

- Policy makers and sector stakeholders require independent, precise, comprehensive and timely market data to inform their decisions.
- A serious data gap exists with regard to information on production systems and cost, prices and margins, as well as living income benchmarks.
- A mechanism for coffee market transparency could be modelled after the existing Agricultural Market Information System (AMIS) launched by the G-20, or coffee could be included in AMIS.

Expanding sustainable global consumption

- There is great potential for increasing demand, especially in non-traditional markets.
- Higher consumption of coffee in producing countries can contribute to a more balanced global market, thereby stabilizing prices
- Stronger local demand in coffee-producing countries increases the value added in the domestic coffee industry and reduces exchange rate risks.
- Obstacles to consumption in all markets (e.g. import tariffs, excise taxes) should be reduced in order to stimulate demand.
- Global demand for certified sustainable coffee is lower than supply, diminishing the positive economic impact of certification schemes for farmers. Consumer-facing coffee businesses should educate coffee drinkers to stimulate demand for sustainable coffee.

Addressing the long-term challenge of climate change

- Climate-smart agriculture and farming techniques are being developed and successfully piloted, but their adoption needs to be brought to scale.
- Public and private funding for agricultural research and development, as well as in the dissemination of new climate-tolerant and disease-resistant varieties, is too low.

- There is potential to tap into new forms of financing, e.g. responsible and sustainable investment, through blending of public-private finance.

Technological innovation and digitalization

- Digital innovation is a crosscutting theme. The ability to generate and collect data (remote sensing, crowd-sourcing, Blockchain) and to analyse data (machine learning, artificial intelligence) has significantly increased.
- Harnessing digital innovation can improve coffee yields and lower costs, connect farmers to markets and consumers, improve access to finance, lower the cost of certification, provide more transparency for all sector stakeholders and enable the tracking of SDG commitments.
- The development and dissemination of innovative technologies needs to be inclusive (smallholders, women farmers, youth) in order not to increase the divide between digital haves and have-nots.

Co-responsibility and shared values in the global coffee sector, advocacy and mobilizing support

- The Sector Dialogue is guided by the principles of shared values and responsibilities between farmers, downstream value chain actors, consumers and governments.
- Getting together as a sector in this dialogue was acknowledged to be a crucial first step, demonstrating that all stakeholders are willing to play their role in finding solutions.
- In recent years, downstream value chain actors (traders, roasters and retailers), as well as sectoral organizations, have developed effective sustainability initiatives and practical solutions. Efforts should be made to scale up such programmes with public support and to ensure that they benefit farmers outside the supply chains of individual companies.
- International organizations (e.g. IFAD) are ready to engage with the coffee sector with concrete

pilots being prepared together with the ICO and private sector companies (CACHET Programme).

- The European Commission sees an urgent need for the international community to respond to the challenges faced by coffee growers and is ready to take leadership, showing a clear commitment to support the sector as part of priorities defined in the Multiannual Financial Framework post-2020 and the second phase of the External Investment Plan.
- The ICO will continue to mobilize support from multilateral entities, such as the G-7, G-20, General Assembly of the United Nations and international organizations, along with additional resources to facilitate fundraising, sensitize and engage consumers, implementation and monitoring of the actions identified.

Initial concepts to discuss in one-on-one stakeholder consultations...

Based on the analysis and recommendations derived from the consultative events, the following **initial concepts** were formulated to **address the impact of price levels and volatility** in the short term and **achieve long-term sustainability in the coffee sector**:

- 1) **Establish a global funding mechanism/programme to fight extreme poverty in the coffee value chain** and to increase income and the access to basic services; provide alternative income for coffee growers, especially to smallholder farmers; promote diversification of production.
- 2) **Set up a mechanism that fosters the development and dissemination of digital innovations** to increase the profitability of smallholder farming through higher productivity and cost efficiency, increased market access and direct links with consumer, and access to information and finance.

- 3) **Strengthen existing mechanisms for market transparency** through, among other actions, benchmarking of production costs, prices and profitability and the establishment of an observatory on profitability at various points in the value chain in order to enable equitable growth.
- 4) **Take measures to expand sustainable consumption of coffee in traditional and emerging markets and especially in producing countries** by implementing national/regional and global campaigns in a pre-competitive joint effort, and by decreasing obstacles to consumption, such as tariffs or taxes, where applicable.
- 5) **Assess existing models and develop and pilot innovative mechanisms to increase access to finance for investments** in the modernization of farms and adoption of climate-smart agriculture, price/weather risk management, and income diversification.
- 6) **Explore regulation of futures markets, developing**, testing/piloting and implementing alternative pricing models and fostering responsible sourcing practices.
- 7) **Promoting investment for research and development in new varieties and improved production technology** (pest & disease resistance; climate change tolerance)
- 8) **Identify technologies/approaches for greening of the coffee value chain** and reducing its environmental footprint (reducing deforestation, fostering circular economy, finding alternative uses for coffee).
- 9) **Sharing best practices of government policies to help to achieve a more balanced market** and to promote an enabling environment for the coffee sector (farmer aggregation, income diversification).

...leading up to the CEO & Global Leaders Forum.

In July 2019, the Sector Dialogue will move into its second phase. The key concepts will be discussed individually with key stakeholders in order to build consensus on concrete actions. The **ICO's first CEO and Global Leaders Forum** of the coffee industry will be held on **23 September 2019** in London, as part of the 125th Session of the International Coffee Council. The decisions of the Forum will be set out in a **formal declaration with concrete actions and a road map** that will be supported by all participants in the Sector Dialogue and submitted to the International Coffee Council during that week, at which time all ICO Member governments will be also invited to endorse it and to earmark resources for its implementation.

In addition to the declaration, the findings of the Sector Dialogue will be reflected in the **ICO's new flagship publication, the Coffee Development Report 2019**, which will focus on the economic sustainability of coffee.

ANNEX 1: List of experts who participated in the consultative events (speakers, discussants, moderators)

Participant	Role	Organization	Participated in					
			Nairobi	New York 1	New York 2	Rome	Brussels	
Alliot, Christophe	Co-founder	Bureau for Appraisal of Social Impacts for Citizen information (BASIC)						x
Andrade, Stenio	Consultant West and Central Africa Division	International Fund for Agricultural Development (IFAD)						x
Archer, Justin	East Africa COO & Head of Sustainability	Sucafina SAS	x					
Arga, Mesganu	State Minister	Ministry of Trade and Industry						x
Bailey, Kavi	Founder and CEO	Grand Paradé Coffee	x					
Bleicher, Zak	Partnership Officer	IFAD		x	x			
Bellomo, Nicola	Ambassador	Delegation of the European Union to Rwanda					x	
Boga, Hamadi Iddi	Principal Secretary	State Department for Ag. Research (Kenya)	x					
Bonnieux, Gaëlle	Consultant	Former ResponsAbility						x
Brando, Carlos	Chair	Global Coffee Platform	x					x
Brasileiro, Silas	Executive President	Conselho Nacional do Café (CNC), Brazil						x
Browning, David	CEO	Enveritas	x					
Bunn, Christian	Postdoctoral Fellow	International Center for Tropical Agriculture (CIAT)						x
Burity, Marcelo	Head of Green Coffee Development	Nestlé						x
Carrington, Briget	Managing Director	C Dorman Ltd	x					
Cerutti, Mario	President, ECF/Chief Institutional Relations and Sustainability Officer	Lavazza						x
Celi, Giacomo	Sustainability Director	Mercon Coffee Corp.						x
Dallinger, Jonas	Adviser	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH	x					
De Knoop, Michel	Head of EU Delegation to the ICO	European Commission/DEVCO						x
de Lima, Aguinaldo José	Consultant	ABDI Agribusiness	x					
de Recinos, Celeste Fumagalli	Representative of IWCA,, Coffee Producer	Association of Women Guatemala						x
Debela, Adunga	Director General	Ethiopian Coffee & Tea Development & Marketing Authority	x					
Eddiks, Reena	Sustainability Manager	Volcafé Ltd.						x

Participant	Role	Organization	Participated in					
			Nairobi	New York 1	New York 2	Rome	Brussels	
Feige, Andreas	Member of the 4C Board	4C						x
Fleischer, Gerd	Head of Section G510 Value Creation, Innovation, Employment, GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH						x
Gnassounou, Viwanou	Assistant Secretary-General	African, Caribbean and Pacific Group of States (ACP)						x
Goodejohn, Kelly	Director, Ethical sourcing and Traceability	Starbucks						x
Gordon, Eileen	Secretary General	European Coffee Federation (ECF)						x
Harbour, Emma	Head of Global Advocacy	Rainforest Alliance						x
Hollingworth, Steve	President and CEO	Grameen Foundation			x			
Illy, Andrea	Chairman	illycaffè Spa					x	
Kamau, Samuel	Chief Executive Officer	African Fine Coffees Association (AFCA)	x					
Karanja, Andrew		Kenya Coffee Sub-sector Implementation Committee	x					
Kawuma, Frederick	General Secretary	Inter-African Coffee Organization (IACO)						x
Kieyah, Joseph	Chairman	Kenya Coffee Sub-Sector Implementation Committee	x					
Kimemia, Joseph	Vice Chairman	African Fine Coffees Association and Kenya Chapter Chair	x					
Kiunjuri, Hon. Mwangi	Cabinet Secretary	Ministry of Agriculture, Livestock, Fisheries and Irrigation	x					
Kuit, Micheil	Senior Consulant	AgriLogic						x
Küng, Stefanie	Counsellor and Chairperson of the International Coffee Council	Embassy of Switzerland in the United Kingdom				x		
Manson, Hernán	Head of Inclusive Agribusiness	International Trade Center (ITC)				x		
Marrapodi, Giorgio	Director-General, Development Cooperation	Ministry of Foreign Affairs and International Cooperation (MoFAIC)					x	
Martz, Daniel	Head of Corporate and Government Affairs	Jacobs Douwe Egberts (JDE)						x
Matos, Macros Antonio	Director General	Conselho dos Exportadores de Café do Brasil (Cecafé)	x					

Participant	Role	Organization	Participated in					
			Nairobi	New York 1	New York 2	Rome	Brussels	
Mera, Carlos	Senior Analyst, Agro-Commodity markets	RABOBANK						x
Mithamo, Margaret W	President	International Women Coffee Alliance (IWCA), Kenya Chapter	x					
Mizzi, Leonard	Head of Unit	European Commission/DEVCO						x
Molenaar, Jan Willem	Aidenvironment	Aidenvironment						x
Moorhouse, Victoria	Head of Sustainability	Costa Coffee/BCA						x
Murray, Bill	President and CEO	National Coffee Association USA (NCA)		x				
Nardelli, Domenico	Director and Treasurer	International Fund for Agriculture and Development (IFAD)					x	
Ndikwe, Josephine	Treasurer	Kenya's Coffee Producers Association						x
Opitz, Michael	Coffee and Climate/ Managing Director	Hanns R. Neumann Stiftung – HRNS						x
Orduz, Juan Esteban	CEO	Colombian Coffee Federation, Inc.	x		x			x
Pataconi, Gerardo	Head of Operations	International Coffee Organization (ICO)					x	x
Pensel, Annette	Executive Director	Global Coffee Platform (GCP)	x					
Petitt, Mary E	Ambassador for North America	Global Coffee Platform (GCP)		x				
Rapsomanikis, George	Senior Economist, Trade and Markets Division	Food and Agriculture Organization of the United Nations (FAO)						x
Pietrafesa, Ruggero	Development Finance Officer	Cassa Depositi e Prestiti (CDP)					x	
Rheinhardt, Ric	Executive Director Emeritus	Specialty Coffee Association (SCA)	x					x
Ríos, Gloria Isabel Ramírez	Ambassador of Colombia in Italy	Italo-Latin American Institute (IILA)					x	
Rising, James	Assistant Professorial Research Fellow	London School of Economics (LSE)						x
Sachs, Jeffrey	Professor and Director	Center for Sustainable Development, Columbia University						x
Sänger, Christoph	Senior Economist	International Coffee Organization (ICO)						x

Participant	Role	Organization	Participated in				
			Nairobi	New York1	New York 2	Rome	Brussels
Scaraggi, Chiara	Advisor	Agri-Business Development Department, UNIDO					
Schilling, Tim	Executive Director	World Coffee Research					x
Schmidhuber, Josef	Deputy-Director, Trade and Markets Division	Food and Agriculture Organization of the United Nations (FAO)				x	
Semroc, Bambi	VP Sustainable Markets and Strategy	Conservation International/Sustainable Coffee Challenge					x
Sertoli, Paolo	Technical Advisor	AICS - the Italian Agency for Development Cooperation				x	
Sette, José	Executive Director	International Coffee Organization (ICO)	x	x	x	x	x
Solís, Juan Pablo	SAFE Platform Manager	Hivos					x
Szalai, Krisztina	Sustainable Sourcing Manager	Taylors of Harrogate/British Coffee Ass'n					x
Tamari, Nicolas	President	Swiss Trade Coffee Association (SCTA)					x
Tezera, Dejene	Director, Agri-Business Development Department	United Nations Industrial Development Organization (UNIDO)				x	
Thang, Tran Cong	Deputy Director General	Institute of Policy and Strategy for Agriculture and Rural Development, Vietnam					x
Tuan, Nguyen Do Anh	Vice-Director General of IPSARD, Vietnam	Institute of Policy and Strategy for Agriculture and Rural Development, Vietnam	x				
Tuttleman, Ashleen	Programme Manager Coffee	IDH Sustainable Trade Initiative	x				
van Zanten, Carla Veldhuyzen	Member Supervisory Board OikoCredi	Fairtrade International					x
Vanoverschelde, Anthony	CHANGE Facilitator	The Shift					x
Wheeler, Michael	Overseas Representative	Papua New Guinea					x

	Taylors of Harrogate Tchibo		<1% 1.9%
Traders	Azahar Coffee Company COEX Coffee Germany GmbH Fazenda Amizade Agropecuaria Ltda Grand Paradé Coffee Koffie & Thee Nederland Mercon Neumann Kaffee Gruppe Sucafina Volcafe Touton	n/a	9.9% 3.2% 5.9%
Industry bodies, associations /sustainability initiatives and platforms	AgriFI EDFIMC From Coffee With Love Asociación Nacional del Café Associação dos Cafeicultores do Brasil Asociación Dignidad Agropecuaria Colombiana Brazil Soluble Coffee Association (ABICS) Colombian Coffee Association Café for change Commerce Equitable France Conseil Interprofessionnel du Cacao et du Café CLAC - Latinamerica Small producers organization Conselho Nacional do Café - CNC Conservation International Enveritas European Warehousekeepers Federation European Coffee Federation (ECF) FEDECAFE Global Coffee Platform (GCP) Hans Neumann Stiftung India Coffee Trust International Women's Coffee Alliance (IWCA) Kenya's Coffee Producers Association National Coffee Association USA (NCA) Ringgit Hills Coffee Farm SAFE Platform Specialty Coffee Association (SCA) Sustainable Coffee Challenge (SCC) Swiss Coffee Trade Association (SCTA) The Shift Victorine	n/a	n/a
Certification bodies	4C Services Rainforest/Utz Fairtrade	n/a	n/a
Financial institutions	Rabobank IFAD CDP		
NGOs	Hivos (SAFE Platform) IDH Sustainable Trade Initiative Grameen Foundation	n/a	n/a

International/Regional organizations and development agencies	ACP Secretariat Food and Agriculture Organization of the United Nations (FAO) Gesellschaft für International Zusammenarbeit (GIZ) SAFIN International Trade Centre (ITC) Inter-African Coffee Organisation (IACO) UNIDO AICS - the Italian Agency for Development Cooperation	n/a	n/a
Research and development	BASIC London School of Economics Columbia University CIAT World Coffee Research Teneo Institute of Policy and Strategy for Agriculture and Rural Development (IPSARD) CCFC Agri-Logic Aidenvironment	n/a	n/a