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**ICO Coffee Development Report 2020:
“The value of coffee: Sustainability,
inclusiveness and resilience of the coffee
global value chain”**

Background

The Executive Director presents his compliments and has the pleasure of circulating to Members, observers and members of the Private Sector Consultative Board, a link to the [Coffee Development Report \(CDR\) 2020](#), the second issue of the economic flagship publication of the ICO, “*The value of coffee: Sustainability, inclusiveness and resilience of the coffee global value chain*”.

This year’s report provides insights into the coffee Global Value Chain (GVC) based on sound empirical analysis. It considers only the international trade dimension and does not cover local value chain and patterns of consumption.

A key recommendation of the report is that a smart mix of market-driven initiatives and regulatory options, constructive dialogue and joint action between public and private sector stakeholders along with accurate and timely information to facilitate cooperation is necessary to maximize the economic benefits for coffee farmers integrating the GVC. It also stresses the importance of ensuring social and environmental sustainability.

Key findings of the report include the value of annual coffee exports having more than quadrupled from US\$8.4 billion in 1991 to US\$35.6 billion in 2018, with non-producing countries having played a significant role.

The expansion of the coffee GVC is driven by the private sector, but governments need to provide an enabling environment. Higher-income regions such as Europe and North America accounted for more than 96% of roasted coffee exports and 53% of soluble coffee exports in 2018 indicating that processing activities primarily occur in higher-income regions that rely strongly on green coffee imports from the producing lower-income regions.

Other themes highlighted in the report included upgrading opportunities for Arabica and Robusta coffee producers, the need for inclusiveness and the impact of private-sector-driven programmes on coffee growers' ability to target high-income markets, the coffee GVCs contribution to the UN Sustainable Development Goals and on the resilience of the coffee GVC to stressors such as climate change and the current global pandemic.

The full report was officially launched on 28 January 2021. It will be followed by a roadshow that will include presentations of the key messages in Member countries, at development institutions and in political forums with the aim of mobilizing resources and support for the implementation of the main recommendations.

The CDR 2020 will strengthen the Organization's role as the major and neutral source of coffee data and analytics and set the agenda in the global debate on issues related to the development of the coffee sector. The CDR responds to the ICO's mandate to be a leading source of information on the coffee sector in order to enhance market transparency, as set out in the International Coffee Agreement 2007 and also reiterated in the current Five-year Action Plan 2017-2021.

The full Coffee Development Report 2020 is available in English only. An overview of the Report will be available in due course in French, Portuguese and Spanish. A hard copy can be purchased [online here](#) and is also [available to download for free here](#).