INCEPTION REPORT

BUILDING CAPACITY IN COFFEE CERTIFICATION AND VERIFICATION FOR SPECIALTY COFFEE FARMERS IN EASTERN AFRICA (CFC/ICO/45)

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Contents

ABBREVIATIONS AND ACRONYMS 4
EXECUTIVE SUMMARY 5
PREAMBLE 7
PROJECT BACK GROUND 8
BASELINE DATA/INFORMATION ON CERTIFICATION 10
PRODUCTION 10
PREMIUMS 10
CERTIFICATION LABELS IN EAFCA COUNTRIES 11
PARTIES TO THE PROJECT 12
PROBLEM CONTEXT 16
PROJECT OBJECTIVES 17
PROJECT COMPONENTS 18
PROJECT CONCEPT 20
APPROACH AND METHODOLOGY 23
APPROACH 23
MODEL DEVELOPMENT 24
THE FARMER MODEL 24
DIVERGENCE IN APPROACH 27
MARKET LINKAGES AND CO-BRANDING 28
MONITORING, EVALUATION AND GOVERNANCE 29
ABOUT SPECIALTY COFFEES 31
COUNTRY REVIEWS AND INSTITUTIONAL MAPPING 32
KENYA 32
UGANDA 36
TANZANIA. 40
ZAMBIA 44
MALAWI 48
ZIMBABWE 52
BURUNDI 55
ETHIOPIA 57
RWANDA 59

TABLE OF FIGURES

Table 1 production of certified coffees 10
Table 2 Premiums on certified coffees 11
Table 3 Certification labels per country 11
Table 4 Participating National Institutions........ 14
Table 5 Coffee production in Tanzania 2000/10 40
Table 6 Specialty Coffees in Zambia 45
Table 7: Coffee Production in Malawi 50
Table 8 Coffee Exports from Malawi 50
Table 9 Coffee Production in Zimbabwe 54

ABBREVIATIONS AND ACRONYMS

ARFIC	-	Regulatory Authority of Burundi Coffee Sector
CAMAL	-	Coffee Association of Malawi
CFC	-	Common Fund for Commodities
CGA	-	Coffee Growers Association
CORI	-	Coffee Research Institute
CRF	-	Coffee Research Foundation
DCDM	-	De Chazal du Mee
EA	-	Eastern Africa
EAFCA	-	Eastern African Fine Coffees Association
EU	-	European Union
EXCOM	-	Executive Committee
ICO	-	International Coffee Organization
IFOAM	-	International Federation of Organic Agriculture Movements
KNCU	-	Kilimanjaro Native Cooperative Union
MSCFT	-	Mzuzu Smallholder Coffee Farmers Trust
MT	-	Master Trainer
OCIR	-	Office Des Cultures Industrielles du Rwanda
PEA	-	Project Executing Agency
PIA	-	Project Implementing Agency
SCAA	-	Specialty Coffee Association of America
TACRI	-	Tanzania Coffee Research Institute
TCB	-	Tanzania Coffee Board
TOR	-	Terms of Reference
TOT	-	Trainer of Trainer
UCDA	-	Uganda Coffee Development Authority
ZCFU	-	Zimbabwe Coffee Farmers Union
ZCGA	-	Zambia Coffee Growers Association

EXECUTIVE SUMMARY

Capacity building in coffee certification and verification for small scale coffee farmers is only one of the many coffee projects put in place with the noble aim of lifting small scale holders from the yokes of poverty by increasing their yield and its quality, while at the same time conserving their environments for the future generations.

Having recognised the need to increase the yield of fine coffees produced by small scale farm holders in Eastern Africa, International Coffee Organization and the Common Fund for Commodities have mandated the Eastern Africa Fine Coffees Association to undertake a five year project in nine member countries to aid such farmers extend sustainability of their land through employment of good agricultural and management practices.

There has been global understanding that verification and certification initiatives have been long overdue and that it's just a matter of time before sustainability practices become global requirements for all producers and not just for the selected few. This while acceptable, should not overshadow the fact that several critics of these two initiatives has consistently raised concerns that cannot be overlooked if these two noble ideas are to be successful and realize the desired results in the long run.

In order to successfully undertake this project; all stakeholders, both in the private and public sectors must be considered as key and be vigorously consulted in creating this strategic plan that shall ultimately guide the implementation activity.

It is worthy to note that coffee trade, like any other business activity undergoing a complete cycle is highly influenced by the availability of the market. The market is the ultimate driving force that influences individuals and corporate organization to deciding whether or not to enter into a particular business arrangement.

Consequently, trade have been recognised in this document as one of the crucial guiding stakeholders in deciding the implementation process that the project will take. It is imperative that the training, certification and verification standards to be adopted be prepared in accordance with the trade requirements.

Ultimately, the farmer who is the primary project's beneficiary will end up producing his coffee as per the standards and acceptable to the trade hence easily access the market, ultimately realising the financial benefits of his coffee.

The projects proposed model(s) may, and are expected to vary/change within the different countries in order to take into account the prevailing infrastructural arrangements on the ground. While trade and service providers might be the important stakeholders within the Eastern Africa region, the Growers Association in Zambia might be the ultimate authority to chart forward this project. Consequently, the model shall constantly be reorganized in discussions with each country's stakeholders and the project coordinator to ensure better results and its ultimate acceptance and success.

This final inception report is an update of the draft inception report initially prepared. This report has been prepared by DCDM Advisory Services Ltd, and comprises of recommended project approach model to be adopted per country, extensive reviews on the project concept, governance, country reviews and other critical factors that are a necessity to understand for successful project implementation.

DCDM Advisory Services Ltd, which is the Project Implementing Agency (PIA) is proud to have been a lead party in preparation of this project planning document and in line with the Project Implementation Agreement, DCDM will continue to act as a consultative partner with the PEA on the ground implementation of the project, even as it retains its major role as the Finance Manager to the project's funds.

The PEA through its coordinating organ shall consequently, after the submission of this report have not more than 90 days to review it and propose any recommendations for adjustments to the PEA, after which the amendments can be made only after exhaustive consultations between the EXCOM, with the approval of the CFC and ICO.

PREAMBLE

Every business idea, be it in production, distribution or the services sector has to take into account the business cycle of that industry's requirements. Different business sectors are made up of different business cycles with each cycle having different components.

One business component that pervades across all the industries' business cycles and which is the end activity necessary for the realization of the financial benefits accruing from any transaction or business process is the market.

In the absence of the market, any business process however favourable be it in the manufacturing, distribution, retail or the service industry ceases to be of any tangible financial value or benefit. Consequently, such processes are considered to make no business sense. In other words, they are not businesses because they are financially worthless.

From the backdrop of the above explanation, it would not be any more of an assumption to deduce that the market is among the key business drivers. Without the market, there are no returns (money or otherwise), and without returns, that is not a business process.

Therefore, within the Common Fund for Commodities/ International Coffee Organization's Project, ***Building Capacity in Coffee Certification and Verification for Specialty Coffee Farmers in Eastern Africa***, it has been proposed that trade, like in all the other successful business processes shall be among the key components in shaping the direction that the project will take. However, this will not supersede the fact that the project, by the basis of being funded by the CFC/EU shall seek to work with the governmental institutions owed by the governments which are by extension the contributors of these monies.

In as much as the project team during its development have sought to harmonize project concept and application across territorial boundaries, its implementation shall widely be affected by the different infrastructural arrangements pervading across the various project countries. Consequently, priority institutions on implementation and structure might change in order to attain the common objectives across board.

PROJECT BACK GROUND

Coffee plays a vital role in the economic progress of many developing countries in Sub-Sahara Africa. Not only do countries such as Burundi, Ethiopia, Rwanda, Kenya and Uganda among others depend on coffee for a large portion of their export earnings, but coffee also provides a vital source of income to millions of coffee growers, farm workers and their families both directly and indirectly.

The project CFC/ICO/45, aims at building coffee certification and verification capacity within the Eastern African Fine Coffees Association (EAFCA) member countries of Burundi, Ethiopia, Kenya, Malawi, Rwanda, Tanzania, Uganda, Zambia and Zimbabwe.
It provides for a total of 6,030 individuals to be trained under different capacities that shall include coffee certifiers/auditors, master trainers, trainers of trainers and farmers (lead farmers).

Principally, the project aims at aiding farmers to meet certification/ verification requirements. The ability to sustainably train, verify and certify the farmers in the future will be enhanced by the training of certifiers, master trainers and trainers of trainers. The certifiers, master trainers and trainers of trainers will be placed under the arms of the various national institutions selected to be part of this project with collaborations with some members of the private sector.

The Eastern African Fine Coffees Association [EAFCA] focuses on the quality of coffee, the quality of life and the quality of the environment. It is implicit therefore that, as much as possible, raising the quality of coffee produced, and having various value addition certification/verification programmes in the EA region shall improve market access which in turn shall improve the income of coffee growers and by so doing reduce poverty and associated hunger.

In a CFC/ICO funded study conducted by EAFCA regarding coffee certification/ verification initiatives in Eastern Africa [CFC-Ref-No 04/19 of 2004], it was reported that there are several sustainable coffee initiatives within the EA region, most of which are little known to the affected farmers at both the country and region levels.

The study recommended the training of smallholder coffee growers in the various elements of the sustainability schemes that shall ultimately lead to verification and certification. The training must be conducted in simple terms and in local languages. Thus there must be well trained trainers and extension officers at all levels of the coffee production and processing chain.

The International Coffee Organization endorsed a preliminary project for financing by CFC in line with their policy on *"sustainable coffee economy"* which was conducted by the IFCC and published in July 2005. The report recommends, amongst other issues, the development of certification/ verification capacity in EA region, in line with modern thinking on sustainable coffee. In May 2007, the Executive Board of ICO and the ICO council approved the projected and recommended it for to CFC for funding.

Consequently, on November 10 2009, the agreement was concluded between EAFCA, ICO and CFC for EAFCA to act as the Project Executing Agency (PEA). It is against this backdrop that the estimated project cost amounted to USD 4,600,727. CFC approved a total of USD 2,000,000 while the EU chipped in Euro 1,146,430. The deficit of USD 995,725 was to be bridged from the EAFCA National Coffee Institutions and its members in kind.

BASELINE DATA/INFORMATION ON CERTIFICATION

PRODUCTION

Statistics on specialty coffees are few and scanty depending on the efficiency and effectiveness of relevant national agencies mandated with the role of gathering such data. On the right hand, certification agencies, which directly deal with specialty coffees are the best suited to amass this baseline data. Unfortunately, these certifying agencies only collect information that is related to their line of operations. In addition, a great deal of this information is considered marked advantageous and consequently classified.

Production data regarding these coffees can therefore be well analysed per each certification agencies. It is prudent to note that some data relating to year 2010 is on estimation bases and is expected to change as these agencies capture the more accurate data.

Table 1 production of certified coffees

	UTZ Certified (MT)		Fairtrade (MT)
	2010	2009	2009
Kenya	8,000	7,503	252
Ethiopia	8,000	2,029	2,981
Uganda	5,500	5,060	443
Tanzania	2,800	711	1,898
Rwanda			332
Burundi	3,50	170	
Zambia			
Malawi			
Zimbabwe			

Source: UTZ Certified Supply and Demand Report 2010

- Statistical information lacking

PREMIUMS

For a long period of time now, verification and certification initiatives have been tied to payments of premiums. Consequently, there has been an expectation that the costs associated with adopting the GAP's/GMP's shall be compensated on the high premiums that the coffees shall fetch in the market.

However, over the years, premiums on certified coffees have dropped to low levels which other things remaining constant, would make certification an expensive undertaking without resultant additional benefits. Even as the project seeks towards increasing the volumes of verified and certified coffees, more emphasis is being placed on improving the quality and quantity, which shall ultimately lead to increased revenues to compensate on increased costs. However, premiums associated to certified coffees for the year 2009 are as below:

Table 2 Premiums on certified coffees

UTZ Certified		Fair Trade	
Arabica	Robusta	Arabica	Robusta
US$ 5.7c/lb	US$2.49c/lb	US$1.25c/lb	US$ 1.01c/lb

- Statistical information missing

CERTIFICATION LABELS IN EAFCA COUNTRIES

The table below documents the certification and verification labels currently available within the project member countries

Table 3 Certification labels per country

Country	Utz	Rainforest Alliance	Starbacks/CAFÉ	Organic	Fairtrade	4C
Kenya	✓	✓		✓	✓	✓
Tanzania	✓			✓	✓	✓
Uganda	✓				✓	✓
Rwanda				✓	✓	
Burundi						
Ethiopia	✓	✓	✓	✓	✓	
Malawi						✓
Zambia	✓		✓			✓
Zimbabwe						

PARTIES TO THE PROJECT

The stakeholders in this project shall include:

1. Common Fund for Commodities
2. International Coffee Organization
3. Eastern African Fine Coffees Association
4. DCDM Advisory Services
5. Public Entities/National Institutions
6. Trade and Market
7. Verifying and Certifying Agencies
8. Farmers and their associations

1. Common Fund for Commodities

Hereby referred in this strategy document/inception report as the **Fund,** the Common Fund for Commodities is an intergovernmental financial institution established within the framework of the United Nations. The Fund operates under the novel approach of ***commodity focus*** instead of the traditional ***country focus***.

Member countries benefit from projects financed by the Fund, whose basic rationale is to enhance socio-economic development of commodity producers; and to contribute to the development of the society as a whole. The Fund finances projects for smallholder farmers, as well as small and medium sized enterprises involved in commodity production, processing and trade in developing and least developed countries.

2. International Coffee Organization

Hereby referred in this project as the **Supervisory Body,** it is the main intergovernmental organization for coffee, bringing together producing and consuming countries to tackle the challenges facing the world coffee sector through international cooperation. It makes a practical contribution to the world coffee economy and to improving standards of living in developing countries.

Under the project, the ICO shall supervise the overall implementation of the project over the project duration, and submit a supervision report on the project progress to the Fund at least every half an year. ICO shall also review information submitted to it by the PEA regarding to the project execution, as well as assess whether the actions taken and expenditures made are in line with the project agreement.

3. Eastern African Fine Coffees Association

Hereby referred to as the **Project Executing Agency (PEA),** EAFCA, whose secretariat is hosted in Kampala, Uganda is a regional non-profit, non-political, member-driven association representing fine coffee sectors in 10 member countries namely Burundi, Ethiopia, Kenya, Malawi, Rwanda, South Africa, Tanzania, Uganda, Zambia, Zimbabwe and most recently, the Democratic Republic of Congo.

EAFCA's mission is to promote the production, quality, consumption and trade of African fine coffees. This is to be done through the increase of the volume and value of fine and specialty coffees traded both regionally and internationally, as well as to increase domestic consumption in the respective member countries.

Under the project, EAFCA shall be responsible for carrying out the project within the provisions agreed upon with the CFC and ICO. It is accountable for the coordination and the implementation of the project as well as the day to day management of any other collaborating institutions that it shall enter into agreements with, for the efficient and effective implementation of the project.

4. DCDM Advisory Services Ltd

DCDM, a firm of Chartered Accountants with offices in Nairobi, Kenya was established in Mauritius in 1952. DCDM is the largest Pan-African firm of accountants and consultants in the sub-Saharan Africa, with a staff base of over 1,000 professionals. DCDM is now part of the BDO network and has offices in Botswana, Chad, Kenya, Malawi, Madagascar, Mauritius, Reunion Islands, Rwanda, Tanzania, Uganda and Zambia.

DCDM has been particularly active in mainland Africa over the past twenty-five years. As the only truly bilingual regional firm, DCDM works in both English and French speaking nations. To date, the firm has carried out over 500 donor-funded projects and concurrently worked with governments, parastatal bodies, non-governmental organizations and the private sector.

DCDM has been involved in the Kenyan coffee sector through the successful implementation of the ***"Input credit scheme"*** at Kirinyaga and Embu districts. This CFC project provided for sustainable access to financial services and particularly credit to small scale coffee farmers in the country. Under the project, DCDM acted as the Project Implementation Agent (PIA).

5. Public Institutions

The role of the public sector cannot be over emphasized. In essence, the public sector is the provider of the project funds and extra importance shall be placed on its involvement into the project. Principally, the project aims at building capacity in national institutions by ensuring that those institutions as at the project end do have a calibre of credible and competent trainers.

The representative national institutions for each country, and members of the ICO were selected during the Project Workshop held in Mombasa, Nairobi Kenya on 12 February 2010. Country representatives attending the workshop were given the mandate of choosing the institution that would better advance the project's objectives and the country's agricultural interests. Extra priority was to be given to those institutions that had coffee research stations and possessed capacity and infrastructure to carry out the trainings.

Participating National Institutions are as detailed in the table below:

Table 4 Participating National Institutions

COUNTRY	INSTITUTION
ETHIOPIA	Ethiopia Coffee Exporters Association
RWANDA	Rwanda Coffee Development Authority
UGANDA	Uganda Coffee Development Authority
TANZANIA	Tanzania Coffee Research Station
ZIMBABWE	Coffee Research Station
ZAMBIA	Zambia Coffee Growers Association
KENYA	Coffee Research Foundation
MALAWI	Coffee Association of Malawi
BURUNDI	Regulatory Authority of Burundi Coffee Sector

6. Trade

Trade will be a key player in the implementation model being proposed under this strategic document. Trade plays a highly significant end role in any arm's length business transaction. Trade ultimately decides which product to acquire/buy and thus by extension determines which product shall be made available. A product ceases to be of any financial benefit if it is not market worthy. Hence, trade shall play a crucial role in determining what shall consist of a market worthy sustainable coffee for uptake purposes.

7. Certifying agencies

One arm of fine coffees is verification and certification. Ideally, the Project Agreement has provided for verification and/or certification to be the key aspect. This shall ultimately come from the experts in this field who are the verifying and certifying agencies, or the standard owners.

Considerable effort shall be placed towards partnering with those Certifying Agencies that have the three pillars of standards i.e., economic, environmental and social facets. Ultimately, the goal is to certify the farmer with at least four major certification labels.

8. Farmer(s)

Even though he sits at the bottom of the verification and certification chain, the farmer's ultimate contribution to the success of this project is enormous. The project is set-up on the premise of the farmer as the ultimate beneficiary. All the benefits of training the certifiers, master trainers and trainers of trainers are expected to trickle down to the farmers in terms of producing sustainable coffee using good agricultural and management practices. It is expected that this shall improve on quality, which shall result into a price appreciation as well as an increase the output.

PROBLEM CONTEXT

Sustainability is a word that can be deduced to be of different meanings and/or definitions. This word is derived from the Latin *sustinere* (*tenere*, to hold; *sus*, up). Other words used in synonym to the word sustain include maintain, support or endure.

Since the 1980s when sustainability conscious voices begun being active, it (sustainability) has been used more in the sense of human sustainability on planet Earth. The most widely quoted definition for sustainability is that of the *Brundtland Commission of the United Nations on March 20, 1987*: "sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs."

It begs to be noted that sustainability requires the reconciliation of environmental, social and economic demands, widely acknowledged as the "three pillars" of sustainability.

In early human history the environmental impacts of small bands of hunter-gatherers would have been relatively small, even though the use of fire and the desire for specific foods may have altered the natural composition of plant and animal communities. Thousands of years later, marked the emergence of agriculture and settled communities. These communities initiated the trend of growing their local foods at the expense of critical natural resources.

By the 20th century, the industrial revolution had resulted in an exponential increase in the human consumption of resources resulting to an increase in health, wealth and population. However on the other hand, natural resources were quickly being depleted consequently allowing ecology as a new scientific discipline to gain general acceptance and ideas now part and parcel to sustainability begun being explored.

In 1961 almost all countries in the world had the capacity to meet their own agricultural demand, but by 2005, the situation had changed and many countries were able to meet their needs only by importing resources from other nations. Consequently, a move toward more sustainable living emerged, based on increasing public awareness campaigns.

In the 21st century there is heightened awareness of the threat posed by the human-induced actions and resulting on discussions on the need to meet human needs while not increasing environmental problems. And this is what the CFC/ICO/45 project seeks to address, in conjunction with the social and economical problems of individuals involved in production of coffee.

PROJECT OBJECTIVES

The central objective of the project as previously indicated is to hitherto increase the quantity and quality of verifiable and certifiable coffees in the member states of EAFCA. The Project document projects that at the end of the five year project duration, the following indicators shall indicate the success of the project:

At least a 25% increase in the quality, production and exportation of certified/verified Eastern African coffees

- A substantial improvement in the livelihoods of coffee growers and other stakeholders.
- A substantial increase in the number of people employed by the coffee sub sector.
- At least a 20% increase in demand for coffees meeting minimum criteria for certified/verified East African coffees
- An increase in utilization of existing infrastructure to operate at full capacity
- At least 114 members of National Institutions to be trained as Master Trainers, 201 Trainers of trainers, 78 verifiers/certifiers and 5,751 farmers to be trained in best farming practices.
- At least a 30% increase of importing and roasting companies supporting and assisting farmers in sustainable coffee production

For prudence purposes, the objectives when compared against the current budgetary allocation are a bit ambitious and subject to discussions and agreements between the CFC, ICO, the PEA and the PIA have consequently been revised to include:

- At least a 25% increase in the quality, production and exportation of certified/verified Eastern African coffees based on the current baseline data as provided by the certifiers
- At least a 20% increase in demand for coffees meeting minimum criteria for certified/verified East African coffees
- At least 18 auditors to be trained and hedged within the national institutions in each country
- At least 30 individuals to be trained as master trainers both in the private and public sector, 50 trainers of trainers and approximately 6,000 farmers in best farming practices.

- At least a substantial increase, preferably up to 30% of importing and roasting companies supporting and assisting farmers in sustainable coffee production.

PROJECT COMPONENTS

This project's objectives as indicated above shall be achieved based on two angles:

- Training trainers to build future capacity in national Institutions and
- Training farmers in good agricultural and management practices ultimately leading towards verification and certification

The project document allowed for the training of 6,030 members to be training under the following capacities:

1. **Certifiers/Auditors**

After a prudent review of the project's objectives, it was agreed that 75 persons shall be trained to act as the project auditors and adopted by any of the certifying agents. Consequently, a Request for proposal (Annexure I) document shall be sent to the credible service providers with the ability to train these providers as per the Terms of Reference (TOR) as outlined by the project.

The project shall enter into a Contractual Agreement (Annexure II) with the selected service provider within the scope of activities and budgetary allocations as shall be agreed.

2. **Master Trainers**

Each National Coffee Institution will provide senior staff including managers involved in extension, training and field work, to be trained as Master Trainers in sustainability practices. These Sustainability Master Trainers will be trained by consultants hired by the project in intensive workshops that will include training in all the important elements of sustainability practices. The Sustainability Master Trainers will be staff that are experienced in Good Agricultural Practices and experienced in theoretical and practical training exercises.

The certifying agent responsible for training the of the auditors in component (1) above shall in conjunction with the auditors' training also double up as a trainer of master trainers towards the codes as adopted by the various standard owners.

A list of potential master trainers that shall be updated once all the national institutions have been contacted and contracts signed is attached as (annexure III)

3. **Trainers of trainers/Outreach trainers**

In order to further build training capacity in National Coffee Institutions, the national institutions will also provide additional staff to be trained as trainers for farmers. The Master Trainers will conduct the training of trainers' workshops for staff of these institutions and the private sector.

The staff from the national institutions as well as individuals from the private sector who shall attend the Sustainability Training of Trainer workshops shall be those engaged in farmer training, extension services and field farm work as their daily activities.

4. **Farmers**

The project provides for the training of 5,751 farmers to be trained in good agricultural and management practices, directed towards verification and certification. The breakdown of these farmers per country has been done based on the each country's productivity. However, it is prudent to note that these proposed numbers are not static, are subject to change and will most likely change.

The national institutions identified shall have their capacities and infrastructures confirmed on their ability to deliver training as per the projects requirements. The National institutions shall then be provided with a template (Annexure IV) with the criteria they shall adopt in the selection of the farmers to be the project beneficiaries.

PROJECT CONCEPT

This project seeks to be tailored on the market drive and to build on existing structures in the EAFCA countries. To this end, the main focus of the project CFC/ICO/45 is to build coffee certification capacity for selected farmers so as to produce a differentiated product that would attract sustained market recognition. This entails that focus would be tailored towards farmers with existing expertise in practicing good management practices (GMP) and good agricultural practices (GAP) in the nine countries where the project is being implemented.

The project endears to enhance the skills of target beneficiaries in good agricultural practices and good management practices with so that they can attain coffee certification in a stipulated shorter time than it would take ordinary farmers (ordinary means those farmers not adopting and GAPs/GMPs). In a nut shell, the project seeks for the good farmers (already working towards GAP's and GMPs) and seeks to make them even better. It is expected that through vertical integration with coffee buyers, market linkages for the producers of certified / verified coffees will be improved.

Key among the begging issues that the project seeks to address include; reducing barriers of entry into certification programs include, lack of local knowledge and capacity, high costs of certification and little understanding of the market with respect to product differentiation.

The project aims at creating sufficient capacity on certification, the basis of which shall eventually lead to the access of premium markets, thereby rewarding the best farmers.

Under the concept, the Master Trainers will be trained by the standard owners or a service provider (through a tendering process Annexure V) who possesses the necessary skills and competencies as well as the mandate from the certifying bodies to act as a training agent on their behalf. These master trainers shall be trained to handle and train the Trainers of Trainers in their respective countries on good agricultural and management practices and issues of certification standards.

Farmers shall be identified by the national institutions and be trained by the trainer of trainers.

Through a tendering process, the project shall identify a competent and credible service provider (certifying agent) to undertake the task of training the auditors. These individuals who are meant to come from the national institutions shall then be hedged back to the national institutions but used by the selected certifying agent to undertake audit duties on its (certifying agent) behalf on a subcontract basis or in a manner that shall be agreed on in the MOU between the Project and the certifying agent.

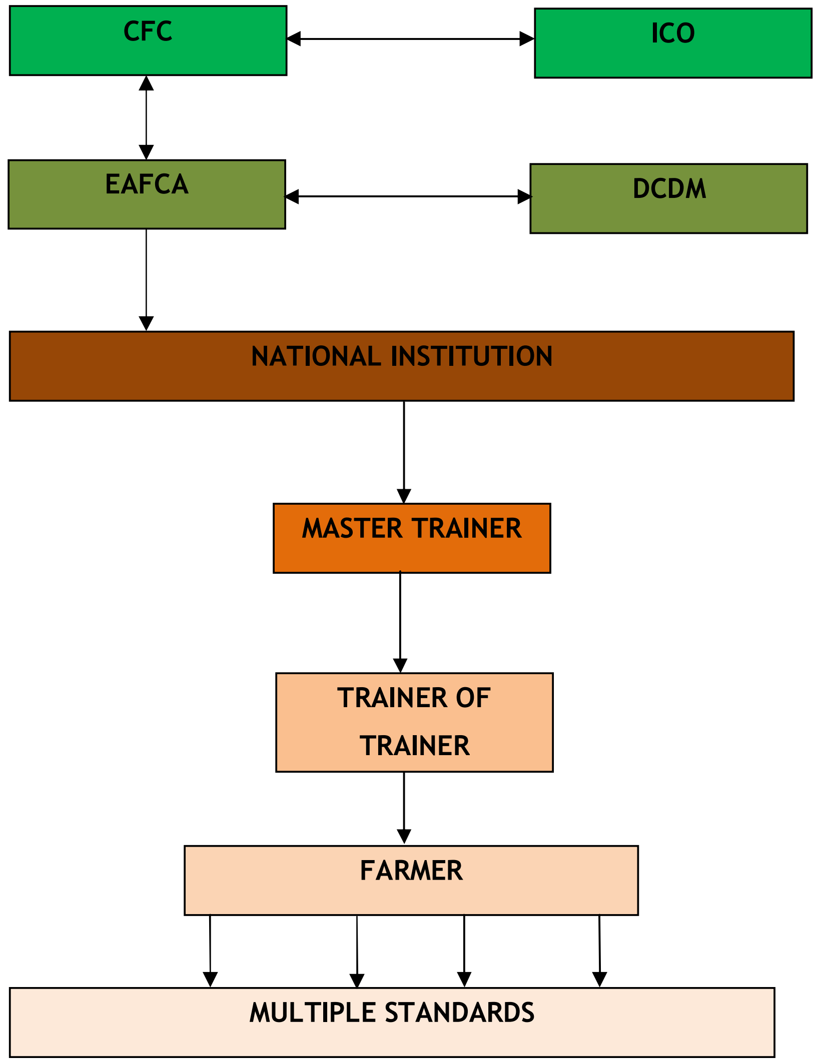
By implementing multiple coffee certification labels, it is assumed that farmers will not only have benefited from improved production methods, but will also be in a better position beat the existing trade barriers and ultimately access better market options.

In order to attain the objectives against budget constraints and time frame, the project seeks to adopt farmers who already have basic understanding of good agricultural practices and good management practices and push them forward towards certification. In a nutshell, the project seeks to adopt good farmers and make them even better.

The equipping of staff from national institutions with credible and competent auditors, master trainers and trainer of trainers with the skills to carry out the farmer training program will ensure that the project ensures sustainable effect. As a result of this, EAFCA region will at the end of the project duration a pool of professional auditors and trainers.

There is significant demand for differentiated coffee which current supply cannot meet. Therefore, it is prudent to develop capacity at farmer level (where the coffee supply chain starts) in order to respond to this market demand. In this way farmers and other stakeholders can be empowered to produce superior quality coffee which would meet social, economic and environmental issues.

The projects flow is diagrammatically represented below:



APPROACH AND METHODOLOGY

APPROACH

The project seeks to build capacity in coffee verification and certification over the next five years. This project initially and ideally was meant to train farmers towards good agricultural and management practices that shall ultimately lead to their coffee being verified and certified.

Training farmers towards good agricultural and management practices is expensive undertaking, consuming time among other resources. The project budget was pegged at USD 3.6 million in cash and USD 995,725 as a contribution in kind from EAFCA and its partners, for the nine participating countries over a period of five years.

This limitation in budget has made it necessary to reorganize the platform to understand:

- From what base line (the floor) should farmers be trained from or
- To what ceiling should the training extend up to?

A combination of different factors was put into consideration before determining the approach to be adopted including. These included:

- Training a raw farmer (one who has absolutely not taken any step towards good agricultural and management practices) will take a minimum of 3 – 4 years before any project results can be realised.
- It shall cost more in terms of inputs and other resources to bring a raw farmer to the acceptable standards necessary for verification or certification. Consequently, the project's budget of USD4.6 million might not be enough to undertake the project from the base level.
- The European Union's grant of Euros 1,146,430 should not only have to be exhaustively spent by 30th June 2011, but substantial results and progress must be visible from the project as at that date, otherwise its portion of grant gets withdrawn.

Consequently and as a result of the above factors, it was recommended that the project adopts those farmers who are already working towards GAPs and GMPs, and make them achieve them easily and quickly. I.e. take the good farmers and make them even better.

Additionally, it was agreed that extra effort should be directed towards improvement on quality and quality that shall ultimately lead to better prices. These better prices shall be as a result of a better cup quality and the increased yield shall lead to higher revenues. The overreliance on the idea of premiums to advance projects cause is unsuitable because these premium markets cannot be guaranteed by the traders to the producers.

MODEL DEVELOPMENT

The development of the project model was long and complex. It is important to note here that this project approach/model recommended originated from a review of different designs recommended, discussed and amended to arrive at the current design.

THE FARMER MODEL

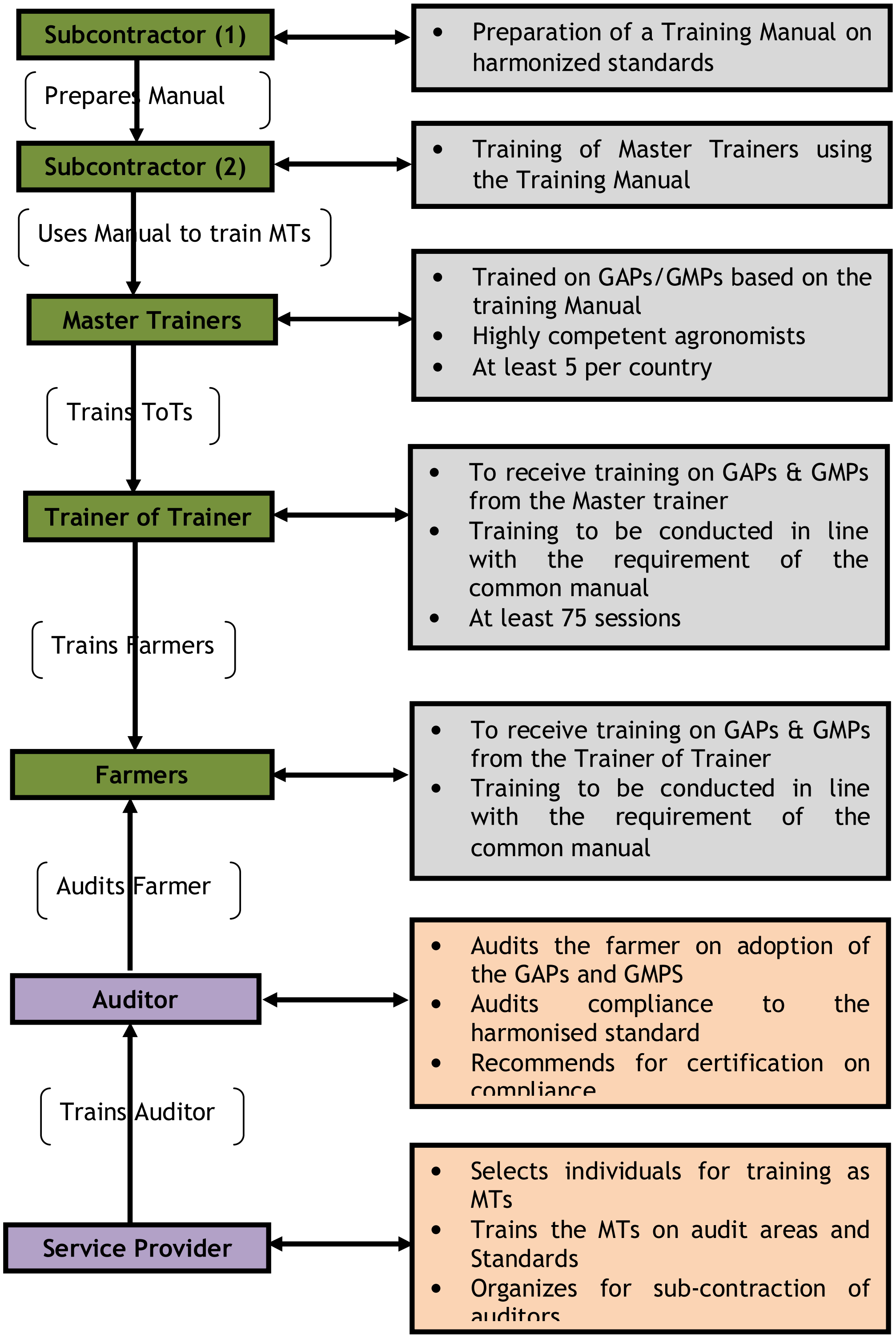
This model seeks to approach the project from the standpoint of the farmer since the farmer is the ultimately beneficiary. Under this project, the farmer shall be taken through Good Agricultural Practices as well as Good Management Practices with the help of ToTs who shall have received training on the harmonized code that shall be based of the highest certification.

It was suggested that in order not to limit the farmers to a single certification and to reduce on switching costs, farmers shall be prepared towards multiple certifications to a minimum of at least four major certifications. Consequently, farmers can easily switch their market inclination based on the varying market prices or other associated benefits.

Project areas and beneficiaries are to be selected by the respective National Institutions using extensive farmer surveys (Annexure IV)

After verification the farmers shall seek to be certified by either, their certification body of choice or all the certifying agencies (multiple certifications) under whose requirement the farmer has satisfied from the use of the harmonized training manual. It is widely expected that a majority of the farmers will go for the later as it has widely visible benefits attached to it.

A flow chart representing this model is represented below:



Concerns

Certification costs money, and farmers undertaking this activity will with high level of certainty spend more on production per square area than those farmers who do not adopt the same practices. Ideally, it is an expectation from these sustainable farmers that their rising costs will be rewarded with a higher return, be it resulting from premiums or increase in production quantities and qualities.

From the look of it, the farmer model, even where it could lead to increased quantities of coffee production, might not obviously guarantee returns and markets to the farmers for their better quality, certified but more expensive to produce coffee. Consequently, there has arisen the need to enter into a separate agreement with the trade members.

The trade members shall be requested to commit themselves to uptake the coffee from a farmer for whom is shall be reserved for, at a price that shall at least equal to the prevailing market price in a free market as at the time of the sale. The farmer shall consequently be forbidden from selling the coffee to any other members of the trade other than the one with which the agreement has been entered into.

Trade member shall additionally be required to brand the coffees produced and certified under this project in wording and on such terms as shall be stipulated in the Memorandum of Understanding to be entered between the Project and the particular trade member.

STEPS

1. A service provider shall be contracted (using a request for proposal – Annexure VI) to prepare a training manual that shall be based on a filtered document on common areas of certification and specific areas for the 7 certifications.
2. Arrangement through a service provider or otherwise shall be made to have master trainers per country training under the requirements of the training manual already prepared under (1) above.
3. Master trainers shall consequently train the ToTs towards GAPs and GMPs as shall have been stipulated in the training manual.
4. During the time under which these training under (1) and (2) above are taking place, a different sub-contractor shall undertake the training of auditors towards audit skills and standards.

5. The national institutions shall enter into a Memorandum of Understanding (Annexure VII) to act as the national institution of the country under which they are selected, and to undertake the activities certified under those MoUs within a budgetary allocation that shall be determined.
6. The country's national institution shall identify the coffee specialty areas within its country. These shall include areas of best ecological conditions with a history of best quality as well as quantities.
7. Using the farmer survey sheet, the national institution shall select project beneficiaries who satisfy the conditions as stipulated within the survey sheet.
8. National Institution, using its resources of Trainers of Trainers shall ensure that the selected project beneficiaries are trained towards GAPs and GMPs with relevance to the training manual.
9. Training of farmers by the ToTs shall take place under the monitoring and supervision of the National Institution with close coordination with the project manager.
10. Project auditors shall continuously verify the coffees in order to ensure that the production is taking place in line with the training manual as ascribed and provided to them.
11. Coffees produced under these projects shall be branded in such words as shall be agreed upon EAFCA and the service provider as at the time of signing the MOU's. Only those coffees produced under this project shall be such branded.

DIVERGENCE IN APPROACH

The project team understands and realizes this farmer model recommended herein as the best possible model that can be utilised for the projects ultimate success to the higher end with regard to the project agreement document. However, and for various logistical reasons, the model might and will be changed to suit any country's requirements.

Some countries such as Kenya, Uganda and Tanzania have already some strong service providers already operating on the ground, against countries like Burundi and Zimbabwe which have weak, if any certifying and verifying initiatives being undertaken. Consequently, teams that could undertake training might not always be limited to ones originating from the national institutions (though given the highest privilege) and neither may they always originate from that particular country.

MARKET LINKAGES AND CO-BRANDING

It is understood that EAFCA aims to derive no direct financial returns whatsoever from the project. However, for its marketing purposes, EAFCA wishes to co-brand on those finished products that have been processed using the coffees arising from the project areas and the project areas alone.

An agreement shall likewise be entered with the trade members to ensure the insertion of such co-branding details as shall be agreed upon by both parties on the finished coffee products.

EAFCA shall undertake different initiative to promote this brand of its certified coffees across the globe to the various coffee end users. EAFCA shall strive to create a uniqueness of its coffee through initiatives that shall comprise of “story development, traceability initiatives, and high cup quality maintenance among others.

To create extensive awareness, EAFCA shall employ various initiatives, key among them to include:

- Coffee Safaris
- EAFCA annual conferences
- Trade fairs
- Championships and
- IT platform – This shall ensure constant access and availability of up-to-date statistical and pictorial information of the coffees being produced under the project through a website designed and owned by EAFCA. This shall facilitate the consumers to have direct access and knowledge of the coffees under production and the stages of production. The object is to create multiple markets consequently increasing competition and making these markets more farmers driven. Consequently, a request for proposal (Annexure VIII) shall be requested from credible IT service providers ultimately leading to a contract (Annexure IX) to prepare the same.

MONITORING, EVALUATION AND GOVERNANCE

1. Advisory group

The overall project monitors shall comprise of an advisory board, which shall be composed of permanent secretaries (or their authorised representatives) of the project related department/ministry per country. They shall be supplemented by three trade members who shall provide expert opinion and guidance.

This group shall meet twice throughout the duration of the project;

- Once during the project commencement/inception
- During the midterm review
- All other meetings shall be virtually conducted through the different and available modes of such communication

The advisory group shall provide global advice to the monitoring layer below it.

2. EXCOM

The Excom shall meet twice per year and shall provide technical and political guidance to the project coordinator. For the reasons of the lean budget, the excom meetings shall be structured in such a way as to coincide with its (excom) official meetings relating to EAFCA's other activities.

3. Project coordinator

He shall be in charge of overseeing the day to day activities related to the project. The coordinator shall provide the technical guidance required to effectively implement the project

4. Project Implementing Agency

The PIA also known as the Project Planning and Financial Manager shall be in charge of providing financial instructions to the various organisations that shall be beneficiaries to the project funds.

The project coordinator and the PIA shall also work hand in hand providing oversight and approvals against each other as at and when such approvals or oversights are required.

5. External Monitoring and Evaluation

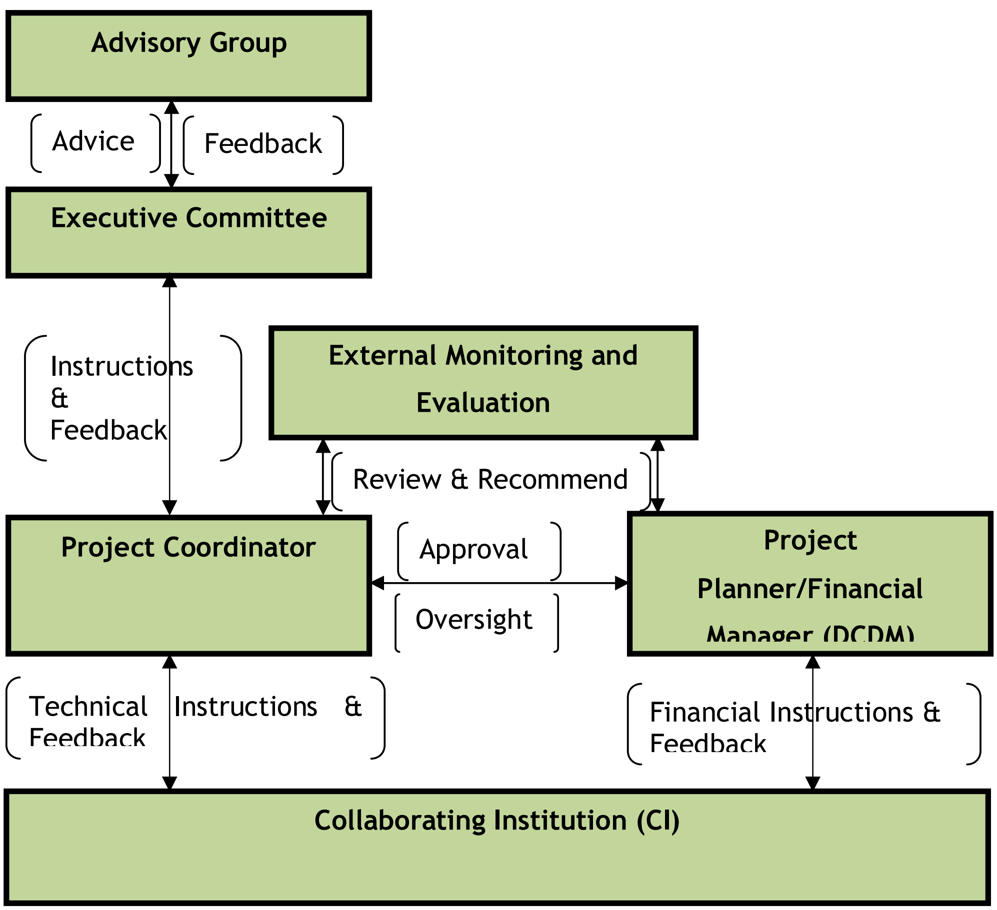
Over and above the four internal monitors above, an external monitoring and evaluation firm with skills and competencies in the field of coffee production and processing shall be selected based on competitive bidding (Annexure X) under the agreeable Terms of Reference.

External monitoring and evaluation shall formally be undertaken annually, i.e. five years through the life of the project and shall be proposed upon every major milestone undertaken for the project to keep its (project) direction in line with the expected results.

The purposes of the external monitoring and evaluation which shall act as the major check for the project shall involve among other things:

1. Review progress
2. Identify deviations in planning and/or implementation
3. Make and/or recommend adjustments that are more likely to make a positive difference.
4. Provide an Evaluation and Monitoring report to the PEA

The project's monitoring and evaluation element is diagrammatically depicted below:



ABOUT SPECIALTY COFFEES

Coffee is one of the most important commodities traded internationally – second only to oil. Its commerce impacts the lives of millions of coffee workers around the world more so in Africa, and countries in Africa depend on this trade as their main source of foreign income.

Specialty coffee refers to several categories of coffee, such as single-source, gourmet, premium, organic which command better prices than the traditional coffee brands and which is grown in the world's most ideal coffee-producing climates and prepared according to exacting standards.

Specialty coffee also refers to high quality Arabica mild coffees that score over 80 points on the Specialty Coffee Association of America (SCAA) grading and cupping scale and they are one of the fastest growing food industries in the world.

When compared with the traditional coffee market, the specialty coffee market requires better information as well as increased transparency in transactions. Information is required on several aspects of coffee production and marketing including exact location of coffee farms, cooperatives and mills, socioeconomic conditions, environmental and climatic data, production and milling processes, materials and inputs used in coffee production, and general marketing information

Indeed African specialty coffee occupies an enviable position in global specialty coffee trade. Most specialty coffee roasters around the world have a great preference for specialty green coffee beans from Africa. Increased trade in specialty coffee benefits both coffee producers, green beans merchants and the environment. Specialty coffee production is often done in a sustainable way that helps maintain healthy forests and ecosystems.

COUNTRY REVIEWS AND INSTITUTIONAL MAPPING

KENYA

For many people, Kenya is synonymous with wildlife and safaris. The country has been visited for centuries, first by the Arab traders who plied their trade up and down the eastern coast of Africa, and now by the hundreds of thousands of tourists who come to experience a taste of true African wilderness. Today Kenya is home to over 43 tribal groupings and, it is widely believed, it is also home to almost every major language in Africa.

Kenya, like Uganda, straddles the equator. It is bordered to the north by the arid bush lands and deserts of Sudan and Ethiopia, to the east by Somalia and the Indian Ocean, to the south by Tanzania, and to the west by Lake Victoria and Uganda.

Kenya's array of wildlife is dazzling, and all of the 'big five' (lion, buffalo, elephant, leopard and rhino) can be seen in at least two of the major parks. The Rift Valley, especially around the Lake Turkana area, has yielded hominid skulls, one of which is estimated to be around 2.5 million years old. These discoveries altered accepted theories on the origin of man.

Historically, the Arabs controlled much of the East African coast until the arrival of the British and Germans in the latter part of the 19th Century. White settlement in the early 20th Century saw the development of agriculture and the establishment of coffee plantations. Coffee was introduced to Kenya by way of Ethiopia.

In the early 1960s, Kenya achieved independence from the colonial administration. The current population of Kenya is estimated at around 38 million. Agriculture is the mainstay of the economy, employing around 80% of the population and contributing to 50% of the country's exports (led by coffee and tea).

Summary of coffee growing in Kenya

- Type of coffee: Arabica
- Volume (MTs 2008): 54,000
- Growing areas: Meru, Kiambu, Kirinyaga, Ruiru and others
- Marketing system: Auction and direct sale
- Processing: Wet processing

- Harvest season: April - June, October - December
- Port of shipment: Mombasa
- Export destinations: Germany, USA, Sweden, Finland, Belgium

National Institution

Coffee Research Foundation

Coffee research in Kenya commenced in 1908, after a Coffee Entomologist was appointed and stationed at the National Agricultural Laboratories.

In 1944, the Colonial Government acquired Jacaranda farm at Ruiru (30 kilometers to the outskirts of Nairobi), and established the Coffee Research Station. Laboratories were constructed and completed in 1949 funded by the Government.

In 1964, Coffee Research Foundation (CRF) was incorporated as a company limited by guarantee under the companies Act (Cap 486).

Mandate

The principal objects of the foundation as outlined in the Memorandum and Articles of Association are "to promote research and investigate all issues relating to coffee and other agricultural and commercial systems as are associated with coffee and on matters ancillary thereto"

CRF has its headquarters at Coffee Research Station (CRS) Ruiru and substations at Koru (Kericho), Kitale (Trans Nzoia), Kisii (Kisii) and Mariene (Meru). CRF also operates a Demonstration plot at Namwela (Bungoma) and several trial sites located all over the coffee growing eco-zones.

Functions

Key functions of the foundation are to:

- Investigate, discover and make known inventions, improvements, processes, materials and designs used for coffee production;
- Collect, collate and disseminate valuable information on coffee to stakeholders;
- Conduct courses and training in coffee management and other related matters;
- Establish and maintain collections of materials, literature and scientific data related to coffee;
- Prepare, publish and circulate literally works on coffee; and

- Work closely with stakeholders and coffee growers in carrying out adaptive research

Some Certification and Verification initiatives in the country

There is not much and direct information on the actual quantities of coffees that are exported as certified from Kenya due to the newness of the initiatives currently in place. We can however safely conclude that the amounts are substantial owing to the number of certification/verification initiatives that are in operation in Kenya; the main ones being Fair Trade, Utz Certified and now 4Cs.

- **Fair Trade** certification (usually simply Fair Trade or Fair Trade Certified in the United States) is a product certification system designed to allow people to identify products that meet agreed environmental, labour and developmental standards.

- **UTZ certified** has managed to certify several large scale farms in Kenya. Most of these coffees have been passed through the UTZ certified value chain and eventually traded through the Nairobi Coffee exchange. According to the UTZ Certified Supply and Demand Report 2010, demand for UTZ certified coffees for the year 2009 amounted to 1,391 Metric Tonnes, against a supply of 7,503 Metric Tonnes.

- **4C** The Common Code for the Coffee Community is a market-based and open initiative to promote and encourage sustainability in the green coffee chain. 4C has managed to engage majority of the coffee stake holders and National Institutions in the country to undertake verification initiatives.

Challenges being experienced

1. Yields would drop below economic levels if no or inadequate agro-chemicals, especially fertilisers and pesticides are applied in coffee production. Organic coffee and Fair-Trade coffee programmes in Kenya are hampered by the existence of major coffee diseases and pests such as CBD, leaf rust, Berry Borer and Stem Borer

2. Smallholder grower organisation may also be too weak to handle some complex coffee initiatives without training and support from government, strategic development partners and private sector

3. UTZ Certified is the only known programme that is so far applicable in large coffee plantations and smallholder coffee farms, although the future is difficult to predict

4. Many plantations are yet to come to terms with the “Social Charter” of any of these initiatives due to uneconomical returns to investments and also due to seasonality of demand for labour.

UGANDA

Uganda is a land-locked country in East Africa, bordering Kenya, Tanzania, Rwanda, Democratic Republic of Congo and the Sudan. The country has seen a tremendous rate of progress and development in the past 15 years. Blessed with an ideal climate, Uganda is a lush country with an astounding amount of lakes, wetlands and rivers, and is the source of the mighty River Nile.

This is a geographically and scenically diverse country. Dubbed by Winston Churchill as the Pearl of Africa, it straddles the equator and boasts mist-shrouded volcanic mountains, glacier capped peaks, simmering hot springs, semi-arid desert, and rolling fertile hills.

There are over 500 forest reserves and a number of national parks and game reserves in the country, providing a safe habitat for this country's array of unique wildlife. Recognised for its wide range of primates (chimpanzees, numerous monkeys and the rare mountain gorilla) and its impressive bird list which tops more than 1,000 species, Uganda is also fast becoming a popular eco-tourism destination for the naturalist and wildlife enthusiast.

Uganda has a long tradition of coffee production - dating back more than 100 years - and is now ranked 2nd in Africa and 7th in the world in coffee production. It is the leading exporter of organic coffee in Africa. It is widely accepted that while Ethiopia is the original source of Arabica coffee, Uganda is the source of Robusta.

Centuries ago, Ugandan warriors would chew the bean or cherry before going into battle. This was believed would make them feel strong, brave and invincible.
The variety of wild Robusta coffees still growing in Uganda's rainforests are thought to be some of the rarest examples of naturally occurring coffee trees anywhere in the world.

Coffee has been the largest single foreign exchange earner for the country since the 1970's, and is based entirely on small scale production. Robusta coffee accounts for 94% of the output, while Arabica coffee accounts for the remaining 6%. There are approximately 500,000 coffee farms in Uganda. About 25% of the entire country's population is dependent on coffee for their livelihood. Other exports from Uganda include cotton, fish, tea, tobacco, maize, beans, and sesame.

Summary of Coffee growing in Uganda

- Type of coffee: Arabica, Robusta, Roasted
- Volume (MTs 2008): 165,000
- Growing areas: Bugisu (Mt. Elgon), Lake Victoria basin, Western Uganda, West Nile
- Marketing system: Direct sale
- Processing: Wet and dry processing
- Harvest season: October - February: Main crop, August: Fly crop
- Port of shipment: Mombasa, Dar-es-Salaam
- Export destinations: European countries

National Institution

Uganda Coffee Development Authority

The Ugandan Coffee Development Authority was established by statutory mandate in 1991 following the liberalization of the coffee industry. UCDA is mandated with the role promoting and overseeing the development of the coffee industry through research, quality assurance and improved marketing. The governing statute was later amended in 1994 and the Coffee Regulations of 1994 aimed at streamlining the industry came into force.

Some Certification and Verification initiatives in the country

In Uganda's few coffee certification initiatives have been undertaken because of high costs involved in mobilizing, sensitizing and training several smallholder farmers. Exporting firms have played a lead role in most successfully implemented certification initiatives.

The oldest certification initiatives in Uganda are ones are Organic Coffee and Fair trade.

- **Fair-trade -** In Uganda, fair-trade coffee is bought by Twin Trading through Gumutindo Cooperative enterprise in Mount Elgon, Mbale district, south-east Uganda. The project operates independently from the union with a small group of cooperative societies and farmer associations. The union is made up of six village co-operatives: Busamaga (422 farmers), Bumayoga (428), Buginyanya (690), Nasufwa (553), Konokoyi (745), Peace Kawomera (576).

The total of farmers is 3,034, occupying a total area of 842 hectares, with an average 0.5 to 2 hectares, with 0.2 hectares per farmer.

All cooperatives are organic except for Konokoyi whose members are in the state of conversion.

- **Ugocert** is assisting farmers to access markets that demand certified coffees such as Organic, Fair-Trade and Eurepgap/Utz. It pays premiums of between 15 and 30 % above prevailing market prices. Certification companies are mainly from Europe. Some if not all of these, have access to Government and donor funds. Donors and development partners also pay for training, capacity building and start UP capital equipment. In several cases they also pay for initial certification costs

- **Eurepgap/Utz** programmes have certified at least one producer organization in Uganda. It is located in Bushenyi and is essentially an organic Robusta coffee scheme that has sought an extra "layer" of certification. It reaches 3,000 farmers and is set to expand to 12,000 farmers in the near future. Other organic schemes in Arabica areas are also in the process of being Utz certified. These two are located in Nebbi (5,000 farmers) and Kapchorwa (4,000 farmers).

- **Common Code for Coffee Communities -** Uganda now has at least two members who are certified 4Cs compliant and are now trading 4C compliant coffees there are two more organizations waiting to be certified.

<u>Challenges being experienced</u>

1. With regards to information on actual direct and indirect costs, they are considered "private & confidential" by certifying bodies, whereas these programmes and initiatives may help deliver positive results and or sensitize the region on social and environmental dimensions, it has been difficult to conclusively prove sustainable economic dimensions, until now.
2. For most certification, it takes one to two crop years from first contact, through training and sensitization to the actual certification. Even then one is not certain of economic benefits.

3. There are some allegations of pressure from donor and international certification companies to use foreign companies to certify, audit and inspect EA coffee programmes, which without local capacity would in itself prove “unsustainable” on account of costs and other factors.
4. The actual cost of coffee certification varies across the country and by implication, the region; depending on programme under reference. Pilot programmes are expensive by nature and do cost in excess of US $ 100,000 per cooperative or sizable farmer group, before any coffee is actually certified or reach the market.
5. Globally, the market share of certified coffee is small. For considerable smallholder farmers to be involved in certification, deliberate efforts should be made to support the organization of the small scale farmers into strong organizations (whether as cooperatives or associations) capable of exporting and managing organizations and honouring contracts. Where to obtain such support still remains a big challenge to the vast majority of farmers from the southern Uganda.
6. In the situation where the farmer’s cooperative cannot export, a private company is normally selected but psychologically farmers will always doubt the credibility of that company even when it is transparent. This emanates from the historical feeling from farmers of being given a raw deal from such arrangements.

TANZANIA.

Coffee production was first introduced in northern Tanzania, Moshi District, in the late 1800s by catholic missionaries from Mauritius. It spread to the southern parts of the country through trading activities. The first Arabica varieties to be introduced were Bourbon and Kent. However, Robusta coffee was introduced in Bukoba District by war lords returning from Congo (then Zaire).

Over 70% of Tanzania's the coffee is produced in the northern and southern parts of the country. The rest is produced in the Kagera region. The northern region accounts for 40% of Arabica coffee growing areas which comprise of Kilimanjaro, Arusha, Manyara and Tanga. The remaining 60% of Arabica growing area is found in the south in the districts of Mbeya, Ruvuma, Iringa and Morogoro. Robusta coffee is predominantly grown in Kagera (Kigoma) and Tarime districts.

Coffee Production Trends

The volume of coffee produced has been on an exponential increase for the past ten years with an average annual coffee production of 60,000 metric tonnes. The southern region accounts for 65% of this production. The average yields range from 200-300g/tree for smallholders and 700-1000 g/tree for estates. The table below highlights production trends from 2000to 2009 in Tanzania

Table 5 Coffee production in Tanzania 2000/10

Year	Quantity (MT)
2001/01 – 2004/05	38000
2004/05 – 2007/08	52000
2007/08 – 2009/10	68000

Source: Tanzania Coffee Board

Coffee Export Trends

Coffee is the second Tanzanian foreign exchange earner after tea, with the main export destinations for being Germany, Italy, Japan, France, the United States (USA), Spain and other European Union (EU) countries. Though statistics of specialty exports are scanty, Tanzania exports specialty coffees to Japan and USA. Domestic consumption is rated at 2.5% and increasing.

Some Certification and Verification initiatives in the country

Like many other African countries, there is not much information on the actual quantities of coffee exports that are certified for Tanzania. There is however evidence that Tanzania Peaberry coffee from the Kilimanjaro Native Cooperative Union (KNCU) cooperative is certified Organic & Fair Trade certified and is available in the market.

The sustainability initiatives that exist in Tanzania include Fair Trade, organic and Utz Certified. Kilimanjaro Native Cooperative Union, KNCU is selling certified coffees to the markets. The beans are Bourbon and Keint varieties, grown by members of KNCU, a cooperative of indigenous farmers of the north-eastern Kilimanjaro region of Capacity Building in Coffee Certification/Verification.

Machare Estate being the first UTZ Certified / Eurepgap certified coffee Estate in Tanzania is taking great efforts in protecting the environment and is trying to educate and convince its neighbours to do so as well.

Tanzania Coffee Board (TCB) is aware and involved on coffee certification programmes and initiatives, principally on organic coffee.

About 27% of Tanzania specialty coffee potentially qualifies for Organic, Fair-Trade and Utz Certified Certification.

Tanzania Organic Robusta received recognition in October 2004, as the best tasting organic Robusta coffee in the EA sub-region at the IFOAM coffee conference in Entebbe-Uganda.

Kagera cooperative Union is certified organic and Fair-Trade, including the related mill at Bukoba.

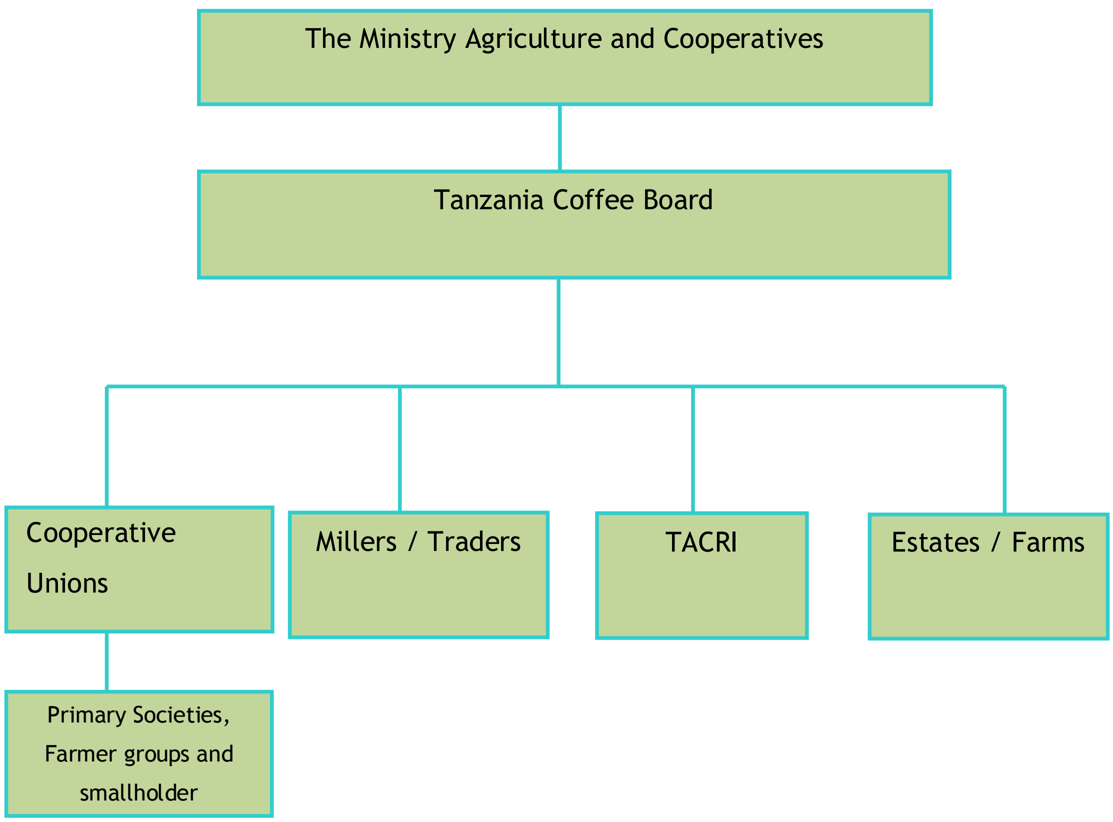
Current Certification challenges.

1. There has been an emerging trend of farmers who were once certified exiting from the programmes due to lack of market linkages for their certified products.
2. There has been market inconsistence since the certifier certifies the whole output but the trader only buys a fraction of the certified output.

3. The cost benefit analysis between cost of certification and the premium earned after certification is almost square.
4. Certification programmes have been highly priced for the common farmer.

Structure of Coffee Industry in Tanzania

The coffee industry in Tanzania is comprised of a regulatory body, research institution(s), cooperative unions, cooperative societies, farmer groups / associations, millers and traders, estate and farmers. The figure below shows the structure of the coffee industry in Tanzania.



National Institution

Tanzania Coffee Board (TCB)

The Tanzania coffee Board has evolved in its functions over the years. Ultimately, the Tanzania Coffee Board was established by an Act of parliament in 1993.

Its primary mandate is to regulate the activities of the coffee industry in Tanzania with its main functions revolving around regulatory, supervisory, advisory, monitoring, coordination and representation. Other functions include licensing of all operators in the coffee business and also conduct coffee auctions.

Tanzania Coffee Board is currently overseeing two projects funded by CFC

Tanzania Coffee Research Institute (TACRI)

Tanzania Coffee Research Institute (TaCRI), incorporated in 2000 as a company limited by guarantee and without share capital under the Companies Ordinance (CAP. 212), became legally constituted and operational in September 2001 with the major objective of rejuvenating the Tanzania coffee industry, placing new emphasis on stakeholder-led, demand-driven research for development.
The power to carry out the operations and management of the Institute are vested in the Board of Directors, through its Chief Executive Director.

The major objective of TaCRI is rejuvenation of the Tanzania coffee industry, placing a new emphasis on the role of stakeholder-led and client demand-driven research for development.

The Institute provides a crucial public service to stakeholders in the country's coffee industry by providing coffee producers with relevant and practical technological innovations and advice that will improve productivity and quality but also enhance profitability and livelihoods for coffee producers and increased competitiveness of Tanzanian coffee on the world market.

TaCRI has five sub-stations namely: Lyamungu (Northern zone), Sirari (Tarime), Ugano (Southern Zone), Maruku (Lake Zone), Mbimba (Southern highland zone) and Mwayaya (Kigoma). These substations are strategically spread across all coffee growing areas within Tanzania.

ZAMBIA

It was not until the early 1980's that coffee production in Zambia was initiated in earnest. The first recorded coffee exports date back to 1985. The modest initial successes, coupled with the need to diversify Zambia's export base resulted in the Zambia government seeking foreign donor assistance to promote commercial coffee

Zambia is well suited to irrigate coffee production, with ample land and water resources. From the very small base of 390 production tonnes in 1985, it rose to 7,000 tonnes in 2004 but is down to 1,700 tonnes in 2009 for a myriad of reasons.

In 2004, planted areas of mature and immature coffee plantings amounted to 4,900 hectares, of which only 140 hectares were owned by small-scale farmers while the rest was owned by large-scale family farms and some companies, both of which are the mainstay of the industry. This hectarage coverage is expected to rise to 6,000 by the end of year 2010 while that if small scale is expected to rise to 400.

Most Zambia coffees are the typical Bourbon style, with fairly rounded beans of bluish/greenish colour, fairly solid and slightly coated. The coffees are acidic in nature and exhibit a rounded full bodied cup.

Most of these coffees from Zambia have been exported to Northern Europe, with a small but an increasing amount going to Japan and the USA.

The coffee industry is regulated by a statutory Coffee Board, whose members represent government, small scale farmers, large scale farmers, and agricultural research and extension services, with a small secretariat in Lusaka, the administrative capital of Zambia.

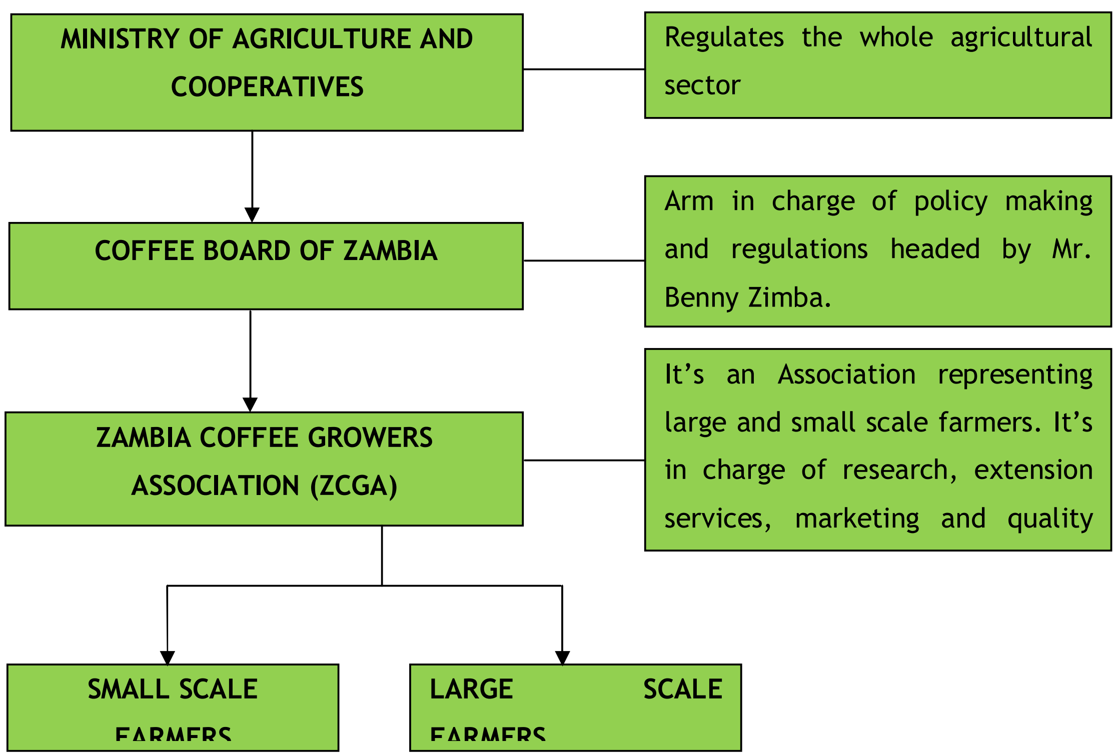
About Specialty Coffees in Zambia

Unlike in most EAFCA member countries, statistical information on specialty coffees in Zambia is a bit well documented by the Zambia Coffee Growers' Association. This statistical data for the last five years is represented below;

Table 6 Specialty Coffees in Zambia

Crop year	Quantity Exported (Mts)	Average Price US$/Mt	Differential Achieved	Quantity (Mts.)/Destination
2005/6	120.00	2,884.07	+23.29	Japan - 100.80, USA - 19.20
2006/7	124.68	3,329.72	+29.94	Japan - 114.48, South Africa - 10.20
2007/8	74.28	3,393.14	+22.53	Japan - 59.88, South Africa - 7.20
2008/9	69.60	3,620.87	+41.50	Japan - 51.00, USA - 18.60
2009/10	387.56	3,918.86	+56.00	UK - 249.60, Australia - 86.46, Japan - 51.00

<u>**Structure of Coffee Industry in Zambia**</u>



<u>**National Institutions**</u>

<u>**Zambia Coffee Growers Association (ZCGA)**</u>

The Zambia Coffee Growers' Association (ZCGA), which is the operative wing of the Coffee Board provides coffee extension services, quality control services and is also responsible for all export marketing as per the Coffee Act of 1989.

Membership is open only to registered coffee growers. In 2004, the ZCGA's membership stood at 69 for large scale farmers while small scale farmers stood at 260. The expectation was to raise these numbers to 110 large scale farmers and 400 small scale farmers by 2010

ZCGA maintains offices, warehousing and processing facilities in Lusaka, and has its own fully qualified quality controllers

Marketing Arm

ZCGA's marketing committee sells coffee for its members through both spot tenders and forward sales. Apart from this, a numbers of members who meet certain criteria are authorized to conduct their own marketing. All physical exports, including quality control are however handled by ZCGA and usually routed via Durban, South Africa, using road and rail. It is projected that in future after the improvement of the railway services and increased production in the north, the port of Dar es Salaam, Tanzania shall be a closer port of call.

Zambia Agricultural Research Institute (ZARI)

Zambia Agricultural Research Institute is the largest agricultural research institute in Zambia that is focussed on public good agricultural research issues. ZARI has its presence in nine provinces either in form of research stations or testing sites. Consequently, it has a large cadre of professional, technical and support staff to conduct meaningful research that addresses problems faced by farmers.

ZARI has a multi-displinary approach in research encompassing soils and water, crops, plant protection, food storage and farming systems. The institute has over the years released several technologies (varieties and management practices) in line with its vision of enhancing household food security band equitable income generation for all.

It is also a major player in facilitation of trade and market access as well as pest and plant clinics soil advisory services.

ZCGA, through the assistance of ZARI and with a training curriculum to be set up in line with the CFC/EAFCA project's objective shall undertake the training of the indicated group of farmers for the next five years after the appropriate MOU has been entered between ZCGA and EAFCA.

MALAWI

Established in 1891, the British protectorate of Nyasaland became the independent nation of Malawi in 1964. Malawi is a landlocked country sharing borders with Mozambique, Tanzania and Zambia. Lake Nyasa or Lake Malawi, some 580 km long, is the country's most prominent physical feature, stretching nearly the whole length of this lush country.

The lowest point in the country is the junction of the Shire River (before it joins the great Zambezi) and the international boundary with Mozambique, where the elevation is just 37 m above sea level, and the highest point is just above 3,000 metres at Sapitwa on Mount Mlanje.

Lilongwe, the capital city, is situated in the centre of the country, but prior to 1975 Zomba, on the edge of the plateau, was known as the "most beautiful capital in the Commonwealth".

The economy of Malawi is predominately agricultural, with about 90% of the population living in rural areas. Agriculture accounts for nearly 40% of GDP and 88% of export revenues, and supports 90% of the country's population.

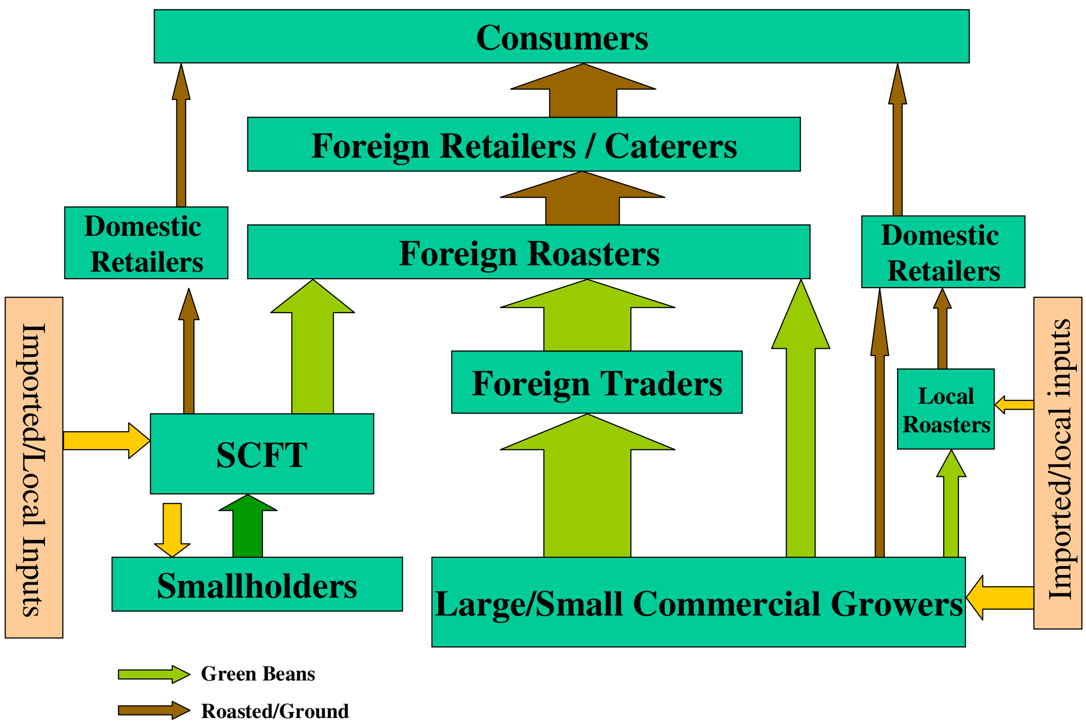
Agricultural products for export come from both, commercial estates and smallholder farmers, with tobacco, tea, macadamia, cotton, coffee and sugar being the major exports. In particular, coffee production is dominated by smallholder farmers from the Northern Region of the country. However, Malawi is a very small coffee producer on the global scale, accounting to just below 0.02% of the total world's coffee.

Malawi coffee is 100% Arabica and grows at an elevation above 950 metres, with most in the range of 1,050 metres or higher. Coffee is grown mainly in the north and in the south-east of the country, with little production in central region. In the south, coffee is grown only by commercial farms/estates (no smallholders) mostly centred around Thyolo and Zomba. In the north, coffee is predominantly grown by smallholders in associations affiliated with the Mzuzu Smallholder Coffee Farmers Trust (SCFT) and by two small farms around Mzuzu. The profile of the coffee sector is therefore completely different between north and south. In total, there are fifteen organizations growing coffee, fourteen are large scale commercial organizations and the fifteenth is Mzuzu SCFT.

Three growers/processors ('growers') – Sable, Makandi and Mzuzu SCFT – account for more than 75% of the country's coffee production

Coffee Value Chain

The Coffee value-chain in Malawi is relatively simple, given that there are only a small number of growers, including a single grouping of smallholder growers. Although this reflects attrition in the industry over the last 15 years, ironically it provides one of the key strengths of the industry in that all the key parties can meet and co-ordinate their activities if they want to.



Coffee Statistics in Malawi

Malawi has predominantly supplied beans into this high-volume market segment and has suffered considerably from the low world market prices since 1989, following the collapse of the International Coffee Agreement and continued world oversupply. The result has been a progressive decline in coffee growing in Malawi with growers leaving the industry or reducing hectarage. As a result, production fell from 7,720 mts in 1991/92 to a low of 1,590 mts in 2004/05, with an increase to about 2,038 Mts for 2005/6.

Table 7: Coffee Production in Malawi

	2001	2002	2003	2004	2005 (estimated)
Area (ha)	3,496	3,234	2,489	2,280	2,157
Yield (kg/ha)	1,059	921	1,038	697	944
Production (MT)	3,703	2,980	2,584	1,590	2,038

With such a small crop, not many buyers will search for Malawi's crop. Malawi has to search for buyers beyond its traditional reliance on the one or two commodity buyers that have regularly bought here. The Smallholder Coffee Farmers Trust has been very active in searching out higher value markets for its coffee, some of it specialty grade.

The table below gives the overall volumes, value and average prices for Malawi's coffee. The upturn in prices since the lows of 2002 provided some relief and the jump in prices in 2005 was a very positive sign, although its sustainability was not a guarantee.

Table 8 Coffee Exports from Malawi

	2001	2002	2003	2004	2005*
Volume (mts)	3,822	2,773	2,933	1,587	2,173
Value ('000 US $)	3,901	2,450	2,734	1,895	3,803
Av price (US $/MT)	1.02	0.88	0.93	1.19	1.75

National Institution

Coffee Association of Malawi (CAMAL)

Established in 1981, CAMAL represents the interests of both the large and smallholder coffee producers in Malawi. CAMAL members produce and market the majority of coffee exported from the warm heart of Africa, of which 100% is Arabica coffee.

As a result of the consistent decline in coffee production in Malawi, the CAMAL offices are small, limited to just one fulltime Managing Director, with offices leased from the country's National Tea Organization.

Some Certification initiatives in Malawi

Certification initiatives in Malawi are only found in Mzuzu Trust, whereby about 70% of the whole farmer population have been certified under Fair trade. However, the large scale farmers have largely been uncertified, more so because Fairtrade, under which the estate farmers would wish to be certified does not certify large scale owners.

Large scale farmers have shied away from undertaking the certification from the other agencies partially because they feel that adoption of the codes as they are will not be favourable for the Malawian coffee growing environment, that might ultimately lead to low, poor quality yields instead of the other way round.
However, Sable farming, in one of its farms is working towards the Rainforest Alliance certification, which they hope to achieve in the near future.

ZIMBABWE

Coffee growing in Zimbabwe dates back to the 1890s, when it was grown for domestic consumption in the Chipinge area. However, commercial production started in the 1950s when farmers tested and adapted East African growing techniques to local climatic and geographical conditions and were able to establish a fine, high quality Arabica coffee in Zimbabwe.

Following the successful commencement of production in the 1950s, coffee then assumed the status of an important export crop generating valuable foreign exchange and employment for about 40 000 Agricultural workers.. In 1980, Zimbabwe produced 5,632 tonnes of coffee and steadily increased production to 13,489 tonnes in 1986 and reached its best ever crop of 14,664 tonnes in 1989.

Regrettably, since then, production has been very erratic due to a myriad of reasons including inadequate funding mechanisms, droughts, black frosts and cyclones, and then the impact of land reform, which has resulted in many new farmers without technical skills in growing coffee.

Coffee growing is concentrated in the districts of Chipinge, Chimanimani, Mutare, Mutasa, Makonde, Harare and Guruve.

Structure of the Coffee Industry

The coffee industry in Zimbabwe, like in many other countries, comprises large and small scale growers. Large scale growers fall under either large corporate estates or individually owned medium sized farms. Large scale farmers have the knowledge and expertise in both coffee farming and value addition and account for a larger proportion of total production.

The main farmers' associations are Zimbabwe Farmers' Union, Indigenous Commercial Farmers' Union (ICFU), Zimbabwe Commercial Farmers' Union (ZCFU), Commercial Farmers' Union (CFU) whose affiliate the Coffee Growers' Association (CGA) is responsible for coffee. The Zimbabwe Farmers' Union also have a coffee commodity association, which works closely with the Coffee Growers' Association.

Government institutions provide research and extension services. The Coffee Research Institute (CORI) under the Department of Research and Specialist Services in the

Ministry of Agriculture, Mechanisation and Irrigation Development is notably the single largest government institution that offers research and extension services to farmers and industry. The Department of Agricultural, Technical and Extension Services (AGRITEX) also offer extension services to the farmers in close liaison with CORI.

Currently large scale and smallholder farmers as well as state parastatals (Grain Marketing Board, ARDA) grow coffee. In addition, there are private corporate growers such as Makandi and Tanganda.

Growers are voluntarily affiliated to the Coffee Growers' Association (CGA) and the Zimbabwe Farmers' Union, who lobby for support of growers in terms of policy, marketing and financial interventions.

Coffee marketing is liberalised with farmers having options to sell green coffee directly to buyers, sell parchment or green coffee to the Grain Marketing Board or sell through agents such as the Zimbabwe Coffee Mill. Brief descriptions on major players are given below.

National Institution

Coffee Research Institute (CORI)

The Coffee Research Institute is responsible for research and development on coffee in Zimbabwe. It liaises closely with all key stakeholders in the formulation and implementation of coffee research projects. It disseminates research findings through field days, production of information materials and conducts training of farmers and extension agents using farmer field schools.

Current Coffee Production

There has been a progressive decline in production over the last six years due to a number of factors such as the hyperinflationary environment that resulted in farmers neglecting their plantations since they could not realise positive returns from their production. This is depicted in the table below.

Additional challenges include the sudden increase in number of new farmers, who did not have the requisite technical know-how to grow the crop, high costs of inputs (such as fertilisers and pesticides), inadequate financial support and absence of training and capacity building programmes for farmers. The bulk of current production comes from the corporate sector.

Table 9 Coffee Production in Zimbabwe

Year	Production (Tonnes)	Prices US cents/Kg
2004	5760.00	177.43
2005	3480.00	253.26
2006	1300.00	252.25
2007	700.00	260.41
2008	750.00	260.18
2009	500.00	262.21

Some Coffee Certification initiatives in Zimbabwe

There is only one documented case of an attempt for organic certification by one farmer in Zimbabwe during the early 90s but this was abandoned due to the high certification costs. Efforts to go into certification by the entire coffee sector through the Zimbabwe Agriculture Ethics Association were in progress during the late 90s but were abandoned to changes in land ownership. However, farmers had adopted good agricultural practices which can be improved upon.

BURUNDI

Burundi is a small landlocked country at the crossroads of East and Central Africa, straddling the crest of Nile-Congo watershed. Sandwiched between Rwanda, the Democratic Republic of Congo and Tanzania, Burundi has beautiful Lake Tanganyika for much of its western border. This is a country dominated by hills and mountains, with considerable altitude variation, from the lowest point at 772 meters (Lake Tanganyika) to the top of Mount Heha at 2670 metres above sea level.

Nearly all the coffee grown in Burundi is of Arabica type. Most is grown in full shade, and is organic, since farmers cannot afford chemicals. Coffee is a major export crop for Burundi. A specialty coffee marketed as Ngoma is traditionally grown and especially sought-after.

Burundi coffee bears striking resemblance to neighbouring Rwanda, in both cup character as well as the culture surrounding coffee. The first Arabica coffee tree in Burundi was introduced by the Belgians in the early 1930s and has been growing in the country ever since. Coffee cultivation is an entirely small holder based activity with over 800.000 families directly involved in coffee farming with a total acreage of 60.000 hectares in the whole country with about 25 millions of coffee tree.

Burundi's coffee, like Rwanda's, is primarily of Bourbon varietals, grown at high altitudes ranging from 1250 to 2000 metres above sea level. Like Rwanda, coffee is planted by smallholder farmers; each farmer tending about 50 to 250 trees. Historically, Burundian coffee was sold as bulked "Ngoma Mild" coffee (Ngoma is a traditional drum). The farmers take coffee to washing stations (wet-mills) which are organized into "SOGESTAL" management groups, each with about 30 stations in them. Coffee has been sold only by mixing all the stations in the SOGESTAL into one big lot, so separating qualities was not possible.

A few years ago, the coffee market was liberalized which meant that individual washing stations can keep the coffee separate, and it can be marketed to buyers by station, and by "day lots", the harvest for a short period of time. With this comes the new possibility to find the gems of Burundi coffee that were formerly mixed in with the not-so-good lots. So new possibilities are emerging in Burundi, and it is a coffee to watch.

Summary on Burundi Coffee

- Production Volumes (MTs): 34,980
- Consumption Volume (MTs) 120
- Main growing regions: Country wide
- Market System: Auction & Direct selling
- Process: Wet
- Harvest Season: February-June
- Port of Shipment: Dar es Salaam
- Export destinations: Belgium, Germany, Holland, Japan, USA, Australia

National Institution

Regulatory Authority of Burundi Coffee Sector

ARFIC (formerly OCIBU) is the new regulatory authority, and has a legal mandate to regulate and supervise Burundi's Coffee industry.
Other functions include:

- Regulating cultivation and marketing systems of coffee
- Regulating and controlling the quality of coffee and coffee by-products.
- Promoting technological advancement in the coffee industry.
- Collecting, refining, maintaining, use or dissemination of information or date relating to the coffee industry

Some Certification Initiatives in Burundi

Information available indicates the availability of at least a single farm certified under UTZ.

ETHIOPIA

Ethiopia is considered as the *"birthplace of coffee"*. It is in the forests of the Kaffa region that Coffee Arabica grew wild. Coffee is "Bun" or "Buna" in Ethiopia, so Coffee Bean is quite possibly a poor anglicized interpretation of "Kaffa Bun". Coffee Arabica was also found in the Harar region quite early, either brought from the Kaffa forests found closer by. It is entirely possible that slaves taken from the forests chewed coffee berry and spread it into the Harar region, through which the Muslim slave trade route passed.

Nearly all coffee in Ethiopia is grown in shade, either as "forest coffee," nearly wild, or "cottage coffee," interplanted with other crops without the use of chemicals. Currently, some of it is now being grown on plantations.

The two main coffee growing regions are Harrar, the province east of the capital of Addis Ababa, and Yirgacheffe in southwestern Ethiopia (also known as Sidamo). Both regions grow coffee on small plots using traditional methods,

Ethiopian coffees are available from some regions as dry-processed, from other regions as washed, and from Sidamo as both dry and washed. The difference between the cup profiles of the natural dry-processed versus the washed is profound. Washed Sidamo, Yirgacheffe and Limmu have lighter body and less earthy / wild tastes in the cup as their dry-processed kinfolk.

Ethiopian coffees can vary greatly from lot-to-lot. It takes a lot of cupping to find the specific lot of coffee that is superior. MAO Horse exports a lot of coffee, but each year one specific "chop" (lot number) out-cups the others. Early shipments of the DP Ethiopians are often the best of the season, in contradiction to many other origins where the earliest are often underdeveloped, lower-grown coffees and the mid-crop pickings are better. Organic supplies have been good, and a few lots have been outstanding.

Some Coffee Certification Initiatives:

There are several certification initiatives in Ethiopia some of which includes: Rainforest, UTZ Certified, Organic and Fairtrade. Approximately, 10 % of Ethiopian coffee is certified.

Governing Institutions

1. Ministry of Agriculture
2. Coffee Lab (CLU)
3. Ethiopia Coffee Exchange (ECEX)
4. Ethiopian Coffee Traders and Exporters

Summary of coffee in Ethiopia

- **Type of coffee:** Arabica
- **Volume** 361,000
- **Growing areas:** Harar, Limu, Jimma, Irgacheffe, Sidamo
- **Marketing system:** Auction and direct sale
- **Processing:** Wet and dry processing
- **Harvest season:** October - December
- **Port of shipment:** Djibouti
- **Export destinations:** Germany, Japan, Saudi Arabia

RWANDA

Rwandan coffee was, at one time, rarely seen in any other country as either a specialty grade or low-end commercial coffee. There simply was not that much coffee produced in Rwanda that went anywhere besides one particular importer in Belgium, the former colonizer of the country.

It is believed that coffee was introduced in Rwanda in 1904 by German missionaries. Around 1930, a considerable interest in coffee developed as it was the sole revenues generating commodity for rural families. The government encouraged (actually, they mandated) low quality, high-volume production. Even with this low grade coffee production, coffee played a considerable role in the economic development of the country because it was one of the few cash crops. But with the collapse of world coffee prices at the international market level, the push to export low grade Arabica made less and less sense.

Transportation is a problem for Rwanda coffee. Their coffee has historically been transported across Uganda to Mombasa, Kenya for shipment to Europe, a trip that can damage the coffee, and one that relies on economic and political stability in the region. The result is that the coffee cannot predictably reach market, so the price and the incentive to produce top-grade coffee had diminished greatly for the village coffee farmer.

Historically, Rwanda has been the 9th largest producer of Arabica in Africa, with 500,000 small farms averaging less than 1 hectare each. Coffee is grown in the western part of the country and in the central area near the capital of Kigali. The eastern part of Rwanda, over 1/7th of the country, is set aside as a national park and there is no coffee production permitted.

General statistics:

1. Coffee is grown by small scale coffee farmers estimated at 400,000 in number, with an average of 165 coffee trees per farmer
2. Only Arabica coffee varieties are grown, with the predominance of bourbon varieties, and small amounts of Capture and Catuai mixed in.
3. Bourbon types include; POP3303/21; Jackson 2/1257; BM 139.
4. Altitude range from 1200 to 1800 meters above sea level
5. Rainfall range from 900 to 2200 mm per annum

6. Soils are generally good, with high yield potential for coffee. About 30% of soils under coffee cultivation are of volcanic origin
7. Cultivated area under coffee farming: 28,000 hectares
8. Flowering: September - October
9. Harvesting season: March - July
10. Caffeine content: 1.3%

National Institution

OCIR Café

The Office des Cultures Industrielles du Rwanda (OCIR) is a government agency responsible for Rwanda's coffee sector. OCIR's vision is to play a central role in supporting and regulating the Rwandan coffee industry through its transformation to a specialty grade producer.

Mandate

- Participate in the development of the policy and strategies governing the coffee sector and ensure the implementation of policies as they affect production, processing, marketing, research and training in the coffee sector.
- Set coffee quality standards and classification systems, control coffee quality and issue quality and origin certificates.
- Collect and disseminate pertinent information relating to the coffee industry.
- Co-ordinate and promote cooperation among various economic sectors within the coffee industry.
- Collaborate with research and extension practices.
- Support coffee farmer associations in the production, pulping, washing, collecting and selling of coffee.
- Train all the parties involved in the coffee industry.
- Participate in international negotiations on behalf of the Rwandan coffee sector and follow up on implementation of agreements.