

Coffee year

2022

2023



INTERNATIONAL  
COFFEE  
ORGANIZATION



# Annual Review

**Stronger partnerships:  
Solutions to overcome  
regulatory and  
market challenges**

# A message from the chair

It was an honour to serve as your Chair in coffee year 2022/23. On the occasion of this Annual Review, I would like to begin by expressing my profound appreciation for the collective efforts that have shaped our journey as the International Coffee Organization (ICO).

Coffee, as we all know, is more than just a beverage; it is a cornerstone of economic and social progress, touching the lives of countless individuals, from dedicated farmers in rural communities, through to dealers and transformers, big and small, and talented baristas who bring joy to consumers worldwide. My thanks to each and every one of you and to ICO Members, knowing that your active participation and engagement significantly contributed to enhancing the coffee global value chain (C-GVC).

Our shared mission, as outlined in the International Coffee Agreement (ICA) 2022, aims to make the coffee sector a beacon of sustainability and fairness, addressing gaps in income, gender, and intergenerational wellbeing. The work undertaken by the ICO and its Coffee Public-Private Task Force (CPPTF) is of relevant significance, as we foster a common vision, promote knowledge exchange, and attract the necessary resources to support our goals.

Considerable challenges were faced during coffee year 2022/23, from the volatility of prices and exchange rates to navigating new regulatory frameworks and addressing socio-political instability and climate change. However, in perfect synergy with the Executive Director and her team, we remained focused on key themes and achieved tangible success. Encouraging more countries to sign the innovative ICA 2022, strengthening our visibility and engagement with key stakeholders, and intensifying efforts to attract funding and establish partnerships are all accomplishments that testify to the dedication and hard work of everyone involved.

I am confident that this reinvigorated ICO will rise to the occasion, overcoming every challenge and delivering the best possible value and services to the sector and us all. To make sure this happens, I encourage every Member, partner and stakeholder involved in the activities of the Organization to play an active role in discussions, always in a spirit of cooperation and friendship.

Moreover, it is impossible to reflect on coffee year 2022/23 without mentioning the highly successful 5th World Coffee Conference (WCC) held in Bengaluru, India, alongside the 136th Session of the International Coffee Council (ICC) and the 5th CEOs and Global Leaders Forum (CGLF). To the Government and people of India, I extend heartfelt gratitude for your exceptional efforts and dedication. The WCC was an unforgettable event and a joyous occasion to finally celebrate together after multiple pandemic-related setbacks over the past few years.

Finally, I would like to thank the many dedicated individuals I had both the pleasure and privilege of working with in coffee year 2022/23, including the current Chair of the Council, Dr Enselme Gouthon of Togo, to whom I wish the best of luck during his term.

**Massimiliano Fabian**

Chair



# Acknowledgements

The Executive Director, Vanúsia Nogueira, along with all ICO Secretariat staff, would like to express their heartfelt appreciation to all ICO Members for their unwavering commitment and active engagement in meeting the objectives outlined in the International Coffee Agreement 2007 and the Sustainable Development Goals.

By fostering more effective collaboration—both among themselves and with private sector companies, associations, development partners, United Nations agencies, civil society organizations, and academic institutions—our Members made significant contributions to the ICO's efforts, enabling the successful execution of the Organization's programme of activities during coffee year 2022/23.

Special recognition is given to the German Federal Ministry for Economic Cooperation and Development (BMZ), the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), the European Commission (INTPA), the International Labour Organization (ILO), the International Trade Centre (ITC), United Nations Development Programme (UNDP) and the United Nations Industrial Development Organization (UNIDO) which, together with private sector members of the Task Force, provided both voluntary monetary and in-kind contributions to enable the implementation of both the initiatives outlined in the CPPTF's 2030 Roadmap and general ICO activities.

We are thankful to all our partners, including members of the Task Force (ECOM Trading, illycaffè S.p.A., JDE Peet's N.V., Lavazza S.p.A., Louis Dreyfus Company, Mercon Coffee Group, Nestlé S.A., Neumann Kaffee Gruppe, Olam International Limited, Starbucks Coffee Company, Sucafina, Sucden, Tchibo and Volcafe), and key supporting organizations such as the British Coffee Association (BCA), IDH the Sustainable Trade Initiative, Global Coffee Platform (GCP), the Sustainable Coffee Challenge/Conservation International (SCC/CI),

the Latin American and Caribbean Network of Fair Trade Small Producers and Workers (CLAC), the European Coffee Federation (ECF), Hanns R. Neumann Stiftung, the Lavazza Foundation, the National Coffee Association of the USA (NCA), Rainforest Alliance, and the Specialty Coffee Association (SCA).

Moreover, our gratitude also goes to the many researchers and academics from educational institutions such as the London School of Economics and the Polytechnic University of Turin, as well as organizations like the ASEAN Coffee Federation (ACF), the Center for Circular Economy in Coffee (C4CEC), the Committee on Sustainability Assessment (COSA), Enveritas, Escola Superior d'Administració i Direcció d'Empreses (ESADE), the Inter-African Coffee Organization (IACO), PROMECAFE, International Women's Coffee Alliance (IWCA), Sustainable Food Lab (SFL), NewForesight and Anker Research Institute.

Finally, special thanks go to the Government of India, the Coffee Board of India and its CEO and Secretary, Dr K. G. Jagadeesha, for hosting the 5th World Coffee Conference, in Bengaluru, and to Mr Massimiliano Fabian of EU-Italy, who served as Chair of the ICC in coffee year 2022/23.

**Vanúsia  
Nogueira**  
Executive Director



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# The ICO in a nutshell

## 75

Countries

## ↑ 94%

Global production

## ↑ 64%

Global consumption

**Exporting members:** Angola, Bolivia (Plurinational State of), Brazil, Burundi, Cameroon, Central African Republic, Colombia, Costa Rica, Côte d'Ivoire, Cuba, Democratic Republic of the Congo, Ecuador, El Salvador, Ethiopia, Gabon, Ghana, Honduras, India, Indonesia, Kenya, Liberia, Madagascar, Malawi, Mexico, Nepal, Nicaragua, Nigeria, Panama, Papua New Guinea, Peru, Philippines, Rwanda, Sierra Leone, Tanzania, Thailand, Timor-Leste, Togo, Venezuela, Vietnam, Yemen, Zambia, Zimbabwe.

**Importing members:** European Union (Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden), Japan, Norway, Russian Federation, Switzerland, Tunisia, United Kingdom.



As of 30 September 2023, the last day of coffee year 2022/23

## Why join?

-  **Influence global coffee policy:** Represent your country's interests within a unique intergovernmental forum for coffee diplomacy.
-  **Forge strategic partnerships:** Build impactful alliances with the coffee industry, donors, financial institutions, and civil society.
-  **Gain exclusive access:** Utilize the ICO Certificate of Origin to guarantee authenticity and quality.
-  **Access comprehensive coffee insights:** Benefit from cutting-edge data, knowledge, and statistics on the C-GVC.
-  **Promote coffee consumption:** Use specialized tools and resources to encourage coffee consumption worldwide.
-  **Support development projects:** Contribute to and benefit from impactful initiatives to boost sustainable growth in coffee-producing countries.

# Strategic Goal #1



**Knowledge  
to succeed**

Delivering world-class data, analysis,  
and information to the industry and  
policymakers



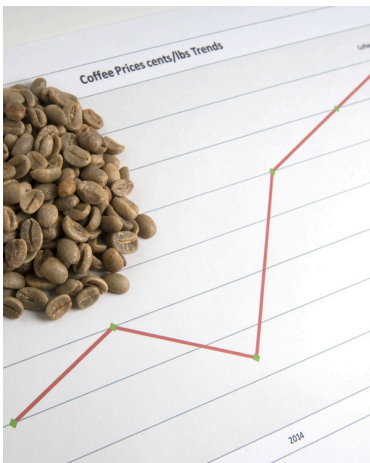
The ICO is dedicated to enhancing market transparency through robust statistical data collection and dissemination, contributing to a deeper understanding of market dynamics. The performance of the coffee sector in 2022/23 is presented below.

# The coffee market

Coffee year 2022/23 was a year of adjustment with global coffee consumption falling 2.0% to 173.1 million bags. This followed a year of recovery in coffee year 2021/22 when the industry grew by 4.0%. Supply also went through another tough year, increasing by 0.1%, following a 1.7% fall in the previous coffee year, to 168.2 million bags. The tight market conditions, however, were not reflected in the ICO Composite Indicator Price (I-CIP), which decreased to an average of 165.5 US cents/lb in coffee year 2022/23 as compared with 197.9 US cents/lb in coffee year 2021/22.



## Prices



As mentioned, in coffee year 2022/23, the I-CIP averaged 165.50 US cents/lb, representing a 16.4% decrease from coffee year 2021/22. However, it remained 26.5% above the 10-year average. In coffee year 2022/23, the I-CIP remained stable, varying in between 153.10 and 178.57 US cents/lb. Meanwhile, the Colombian Milds, Other Milds and Brazilian Naturals declined by 24.3%, 19.7% and 21.4%, respectively, to 219.05, 211.99 and 175.58 US cents/lb in coffee year 2022/23. The Robusta group indicator outperformed all the Arabicas, growing 4.6% to 111.85 US cents/lb, the highest coffee year average recorded since 1994/95 (137.02 US cents/lb). Arbitrage, as measured in between the New York and London ICE futures market, retracted 44.2% to 70.63 US cents/lb between coffee years 2021/22 and 2022/23.

## Production



World coffee production increased by 0.1% to 168.2 million bags in coffee year 2022/23. This stagnant growth rate belied the tremendous changes at the regional level, with the coffee world neatly split between the expanding Americas and the shrinking rest of the world. Asia & Oceania and Africa's production decreased by 4.7% and 7.2%, respectively, to 49.8 million bags and 17.9 million bags. The combined output of the Americas was 100.5 million bags. The Arabicas' output increased by 1.8% to 94.0 million bags as compared with the 2.0% decrease of the Robustas to 74.2 million bags.

# Consumption

**176.6**  
million bags

to

**173.1**  
million bags

compared to previous  
coffee year

World coffee consumption decreased by 2.0% to 173.1 million bags in coffee year 2022/23, following a 4.0% expansion in coffee year 2021/22, with a record consumption of 176.6 million bags. The world was split along the non-producer and producer line, with the former countries' coffee consumption decreasing by 3.4% in coffee year 2022/23 to 118.1 million bags. In contrast, the latter countries consumed 55.1 million bags, up 1.2%. As a result, non-producers' share of the world coffee consumption shrank to 68.2%, from 69.2% in the previous coffee year.

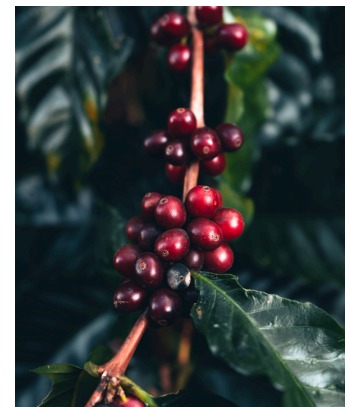
## International trade

Global green bean exports in coffee year 2022/23 were down 5.6% to 110.7 million bags from 117.3 million bags in coffee year 2021/22, with the global drawdown of stocks in non-producing countries contributing significantly to the downturn. Exports of the Arabicas were down 10.3% to 66.9 million bags, further affecting substitution towards the more competitively-priced Robustas, induced by the increased cost of living and reduced disposable income. Green bean exports of the Robustas amounted to 43.8 million bags as compared with 42.7 million bags in coffee year 2021/22, up 2.6%.



## Productivity

World coffee productivity increased by 0.4% to 14.8 bag/ha in coffee year 2022/23 from 14.7 bag/ha in coffee year 2021/22. Much of the annual gain was due to the 0.3% decrease in the harvested area, which fell to 11.39 million hectares in coffee year 2022/23 from 11.41 million hectares in coffee year 2021/22, which in turn was as a result of the 1.2% reduction in the harvested area in Africa. The Americas were the most productive region with 19.6 bag/ha output, followed by Asia at 18.0 bag/ha and Africa with 5.1 bag/ha in coffee year 2022/23.





# Better statistics to increase market transparency

## Documents and data

The Organization is the world’s most respected coffee statistics’ authority, committed to enhancing market transparency by providing Members and third parties with easy access to accurate and comprehensive data and analytics. The documents produced by the ICO Statistics team provide invaluable data and analysis for stakeholders from across the industry, including decision-makers responsible for coffee policies and commercial decisions.

The ICO Statistics Section had a productive year, producing high-quality statistical information and engaging with Members to improve ICO data and provide all stakeholders with a rigorous and neutral benchmark to understand the market and its trends.

## Number of publications produced



There was significant progress in economic analysis and results dissemination, with a remarkable 39% increase in revenue from Statistics between coffee years 2021/22 and 2022/23. Moreover, Gold CPPTF Members now enjoy full access to the ICO World Coffee Statistics Database (WCSD).

# Statistics engagement and capacity building meetings

Bilateral meetings were held with 18 Member countries and one non-member country to build a better working relationship, deepen their understanding of statistics and improve compliance with the ICO Rules on Statistics.

 **19**  
Meetings

 **18**  
Member Countries

 **1**  
Non-member country (USA)

 **16**  
Exporting Countries

 **2**  
Importing Countries



# ICO analytical work and research

By providing insights into economic dynamics, the ICO empowers stakeholders to make informed decisions and drive positive change within the industry.

In line with its mission to promote the sustainable development of the coffee sector, the ICO conducts economic analyses and disseminates key findings to stakeholders. This includes the annual publication of ICO’s flagship Coffee Development Report, which highlights emerging trends and challenges. During coffee year 2022/23, the ICO Secretariat continued to work closely with public and private stakeholders, including the ITC Coffee Alliance Working Group, on the drafting of the next edition of the CDR, the focus of which will be on the circular coffee economy.

Moreover, analytical research focused on addressing poor access to finance, a major constraint to improving productivity and commercialization of coffee both at global and regional levels. However, the ICO’s main area of research in coffee year 2022/23 was on the potential impact of new regulations that affect the production, trade and consumption of coffee, namely the European Union Regulation on deforestation-free products (EUDR) and the European Union Directive on corporate sustainability due diligence (CS3D), and on measures to tackle any unintended consequences of the same. In this sense, the ICO carried out analytical and statistical work, convened a series of webinars, attended several events and conducted field missions alongside key stakeholders to identify solutions and remedial actions.

# Strategic Goal #2



## Winning together

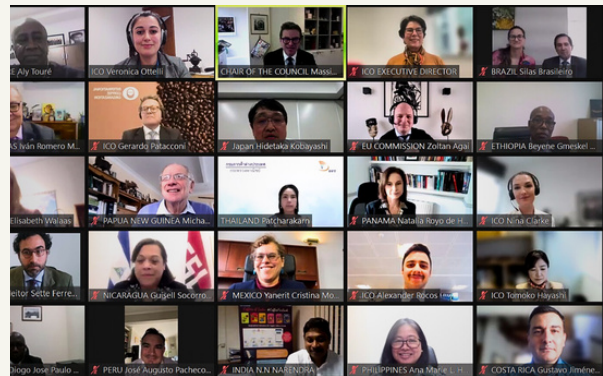
Capitalizing on the Organization's convening power to provide a forum for constructive dialogue between and within the public and private sectors



# International Coffee Council (ICC)

## 135th Session (30 March 2023)

The 135th Session of the Council was held virtually and chaired by Mr Massimiliano Fabian of the European Union. In line with discussions held at the previous Council session in Bogotá, Colombia, Members focused their attention on the key themes of sustainability and the changing regulatory framework, emphasizing the need to adapt to emerging challenges. All decisions made by the Council are contained in document [ICC-135-6](#).



## 136th Session (28 & 29 September 2023)



For the 136th Session of the Council, ICO delegates met in person in Bengaluru, India, following a week of panel discussions and workshops held within the 5th World Coffee Conference. Among other items, Members approved several Memoranda of Understanding, highlighting the importance of partnerships and working together to strengthen the sector. Dr Enselme Gouthon, of Togo, and Mr Tom Fabozzi, of the EU-Ireland, were appointed as Chair and Vice-Chair of the Council for coffee year 2023/24, respectively. All decisions made by the Council are contained in document [ICC-136-14](#).

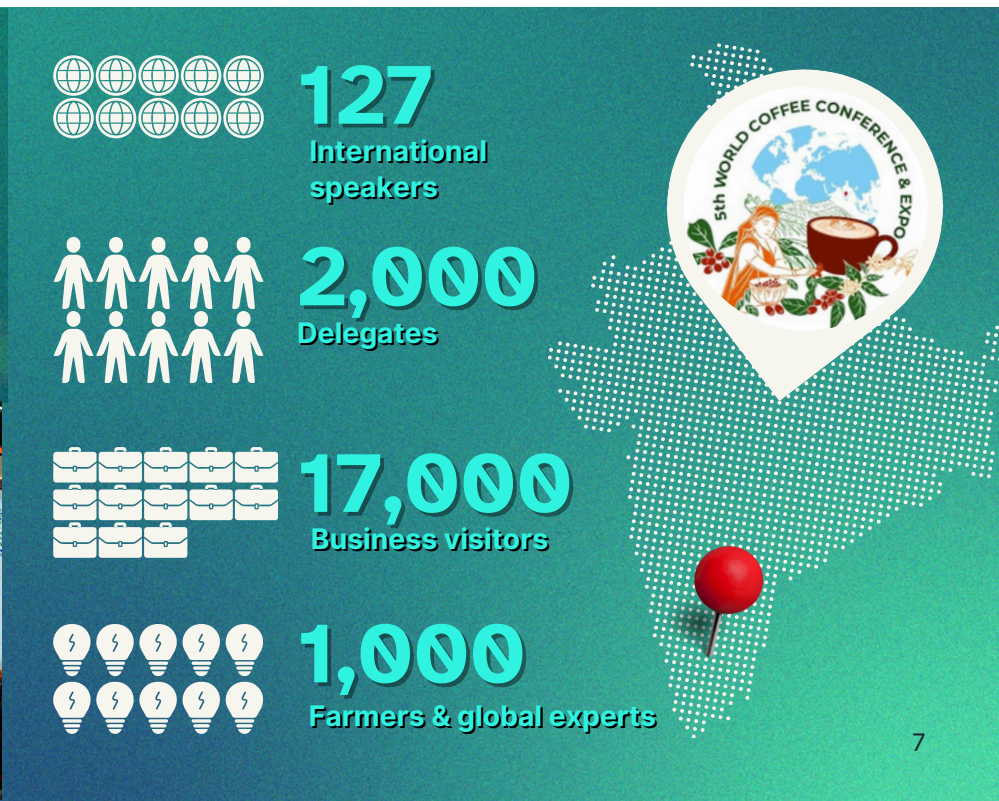
# 5th World Coffee Conference (WCC)

The 5th WCC, organized by the Ministry of Commerce & Industry, Government of India, Coffee Board of India, and Government of Karnataka, in collaboration with the International Coffee Organization (ICO), took place in Bengaluru from September 25th to 28th, 2023. The event focused on the theme 'Sustainability through Circular Economy and Regenerative Agriculture,' accompanied by related activities.

The Conference covered a wide range of topics across 12 thematic sessions, featuring 127 international speakers. It drew over 2,000 delegates from across the globe and welcomed more than 17,000 business visitors. Additionally, the WCC featured competitions and hosted the inaugural Grower's Conclave, which brought together over 1,000 farmers and global experts to address pressing challenges in the sector. Some of the key thematic sessions included:

- **Coffee Market Trends:** Experts discussed the latest trends in the coffee market, including supply, demand, and pricing dynamics.
- **Technology and Best Practices:** Sessions explored innovative technologies and best practices for coffee cultivation, processing, and distribution.
- **Circular Coffee Economy:** The conference emphasized the importance of building a circular coffee economy, focusing on sustainability, waste reduction, and resource efficiency.
- **Regenerative Agriculture:** Participants delved into regenerative agricultural practices that promote soil health, biodiversity, and ecosystem resilience.
- **Sustainability through Consumption:** Discussions centered around promoting sustainable coffee consumption, including responsible sourcing and consumer awareness.
- **Access to Finance:** Experts explored strategies to enhance financial access for coffee growers and businesses.

The proceedings of the WCC are scheduled to be published in 2024.



# 5th CEO & Global Leaders Forum (CGLF)

On 26 September 2023, the ICO and the CPPTF gathered Members, stakeholders, and development partners for the 5th CGLF. The Forum, preceded by a closed meeting of private sector executives from the CPPTF, saw a convergence of commitments from companies and governments, which were captured in “The Bengaluru Best Coffee Commitment”, a joint communiqué that was subsequently approved by the ICC at its 136th Session ([ICC-136-5](#)). The communiqué serves as guidance for coffee year 2023/24 and beyond and the following points are among the key commitments highlighted:

- To continue supporting coffee farmers in the understanding and implementation of regulatory requirements, encouraging the initiatives of producing countries through the creation and transfer of knowledge;
- To further support coffee-producing countries requesting assistance in assessing and closing their living and prosperous income gaps;
- To actively engage in efforts to mobilize additional public and private resources and continue to explore the options and opportunities for establishing a global funding mechanism in favour of the sustainability and resilience of the coffee sector.



**The CGLF gathered recommendations and additional inputs from private sector representatives, ICO Members and key stakeholders on how to lay the groundwork for funding mechanisms that could help coffee producing countries advance their efforts in building truly sustainable value chains.**

# Sustainability & Partnerships

The ICO engages with various stakeholders through the development and implementation of strategies that are vital for fostering collaboration and advancing the ICO's mission.



## Changing Regulatory Framework

The ICO and the CPPTF worked extensively to help Members understand changes in the regulatory framework impacting the coffee sector, seeking clarifications from regulators on the identification of solutions for compliance.

### Regulation on Deforestation-free Products (EUDR)

The key initiatives carried out regarding the EUDR included:

#### Multi-Stakeholder Dialogue Spaces:

Development of representative and participatory multi-stakeholder dialogue spaces in coffee-producing countries such as Rwanda, Honduras, and other members of PROMECAFE. Within the ICO Task Force itself, creation of spaces to link stakeholders from producer and consumer countries to discuss the EUDR and identify solutions.

#### Consortium Collaboration:

Collaboration with the ICO-GIZ-DIASCA-AgStack-CGIAR-COSA consortium to explore technical solutions for global coffee compliance with the EUDR, including outreach to the European Coffee Federation (ECF).

#### Informative Materials:

Provision of relevant documentation addressing the specifics and future implications of the EUDR.

#### Engagement with EU Institutions:

Ongoing dialogue with EU institutions (such as DG INTPA, DG ENV and EU Agency for the Space Programme - EUSPA), including a high-level meeting in Brussels with the European Commissioner for Environment, Oceans and Fisheries, Mr Virginijus Sinkevičius, in February 2023.

#### Online Webinar (24 Apr 2023):

Debating the new regulatory framework to combat global deforestation and forest degradation. The online session gathered over 260 participants from the coffee sector and representatives from the European Union (EU).

#### Annual workplan of the CPPTF – Technical Workstream 3 – Policies and Institutions – Exporting Members:

Focus on changing regulatory framework and EUDR compliance.

 **Corporate Sustainability Due Diligence Directive (CS3D):**

In February 2023, the Executive Director participated in a field mission to Uganda organized by the International Trade Centre , alongside representatives from the European Union, the Organisation of African, Caribbean and Pacific States (OACPS) Secretariat, and the private sector.

The field visit and follow-up activities, which included participation in an EU workshop in Brussels, focused on the implementation of pilot projects to prepare farmers and supply chain operators for compliance with the CS3D and were crucial for gathering feedback from key stakeholders, assessing the effectiveness of both new and existing measures, and identifying opportunities within the coffee sector.

## Review of regulations impacting the coffee sector

Under the Technical Workstream on Policies and Institutions of Coffee Importing Countries, the following activities were carried out:

### Information, Dialogue and Policy Understanding:

Due diligence regulations in importing countries were monitored and assessed. Furthermore, in collaboration with ESADE, an application to enhance Member engagement in reviewing regulatory information was developed and crucial regulatory insights and direct communication with regulatory authorities were facilitated.

### Supporting the Transition to Sustainable Coffee Sector:

In collaboration with the ITC and supported by the European Commission, the ICO carried out a mapping of public and private coffee sustainability projects and developed a web application to provide accessible insights on these initiatives which will be integrated in the ICO Global Knowledge Hub.

### Technical Solutions for Compliance:

Efforts focused on collecting data about the different pilots and initiatives being implemented to comply with key regulations, such as the EUDR, and existing/planned national data systems (geolocation/traceability).

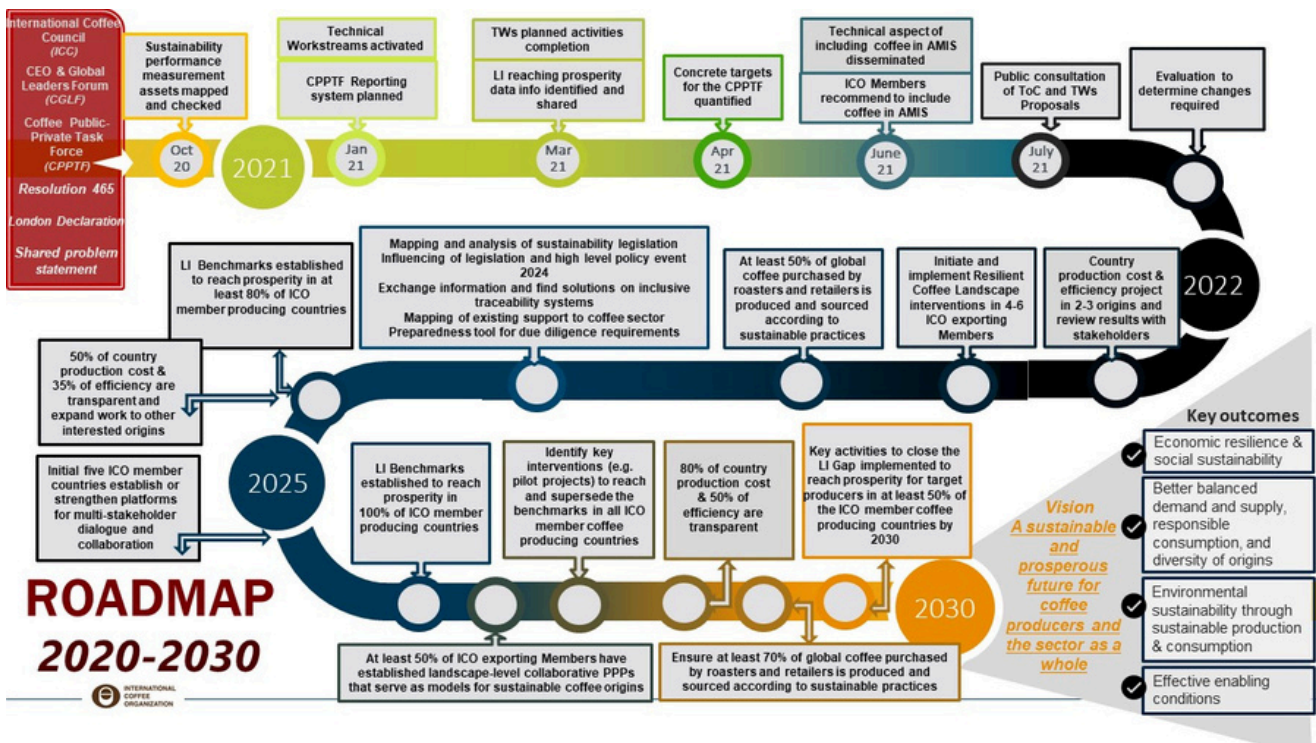




# The work of the Coffee Public Private Task Force (CPPTF)

The initiatives and actions of the ICO’s CPPTF reinforced cooperation among the coffee industry, governments, civil society and consumers, as well as development partners. The CPPTF engaged with global leaders at various high-level events, leveraging the ICO’s influence in coffee diplomacy to ensure coffee plays a significant role in achieving the United Nations Sustainable Development Goals, particularly with regard to fighting poverty by securing a living income for farmers and tackling climate change.

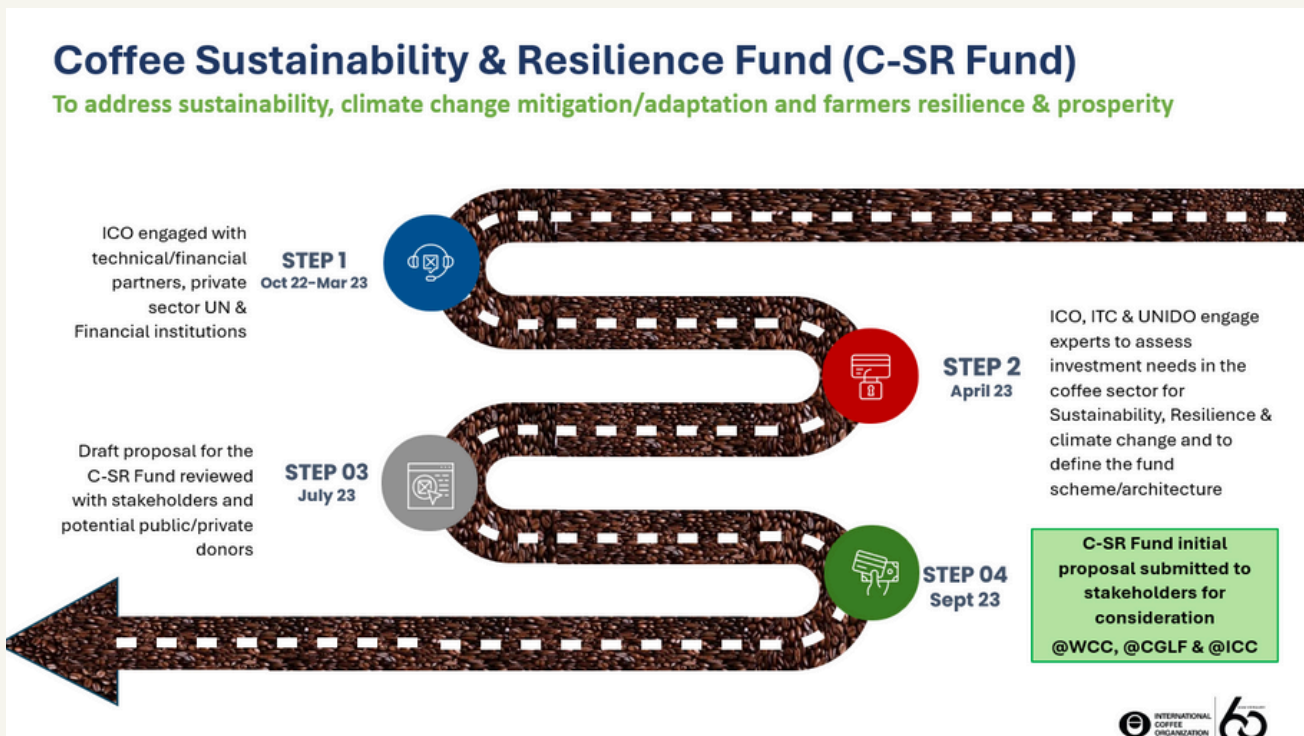
Additional funds were mobilized for the CPPTF’s initiatives. In coffee year 2022/23, the CPPTF and its Technical Workstreams (TWs) were actively engaged in convening actors and implementing activities as part of the 2030 Roadmap



## CPPTF Sherpas Meetings

Three meetings took place virtually and one in person in Bengaluru, India, during the WCC, where representatives (Sherpas) from the private sector joined delegates from ICO Member countries to exchange views on the work undertaken and discuss the most relevant challenges facing the coffee industry and producing countries. These meetings helped to guide the work of the CPPTF, enabling it to focus its efforts on creating more value for Members and coffee communities worldwide.

## Establishment of a global coffee sustainability and resilience facility/fund



With the financial support of UNIDO/Italian Development Cooperation, matched by contributions to the CPPTF budget from private sector members, the Secretariat, in collaboration with ITC, carried out important research to assess the feasibility of setting up a global coffee sustainability and resilience facility/fund. A consulting team started working on the concept during coffee year 2022/23, which is expected to provide a global platform to better engage a vast range of stakeholders and address limited access to funding for coffee farmers and the sector as a whole.

## Center for Circular Economy in Coffee (C4CEC)



(C4CEC) - [www.circulareconomyincoffee.org](http://www.circulareconomyincoffee.org)

**The C4CEC was launched during the WCC in September 2023 and is the first global collaborative platform for the circular economy in the coffee industry.**

Established in Turin, Italy, it is promoted and supported by a global network of partners, including the Giuseppe e Pericle Lavazza Foundation, the ICO, the ITC, UNIDO, the Polytechnic University of Turin and the University of Gastronomic Sciences of Pollenzo, with the objective of accelerating the circular transition in the C-GVC; collecting and sharing best practices, solutions, studies, and practical information regarding the circular economy as applied to the coffee value chain, from coffee farming to consumption and disposal; and providing assistance to Members and coffee stakeholders in the realization of circular solutions.

This collaboration builds on the partnerships established through the ITC Coffee Guide Network initiative and the circular economy working group co-facilitated by the ITC, the ICO, and the Lavazza Foundation. Key partners include ACRAM, the Coffee Board of India, Fairtrade International, the Latin American and Caribbean Network of Fair Trade Small Producers and Workers (CLAC), the IWCA, the Polytechnic University of Turin, Rainforest Alliance and the Speciality Coffee Association (SCA), working together to make knowledge available to small businesses, value chain operators, farmer organizations, and consumer-facing companies worldwide.



# Strategic Goal #3



**Promoting  
coffee actions  
for development**

Development of projects and  
promotion of consumption





# Strengthening cooperation

The ICO was guided by clear objectives aimed at enhancing our collaborative efforts, prioritizing the implementation of Memoranda of Understanding (MoUs) and recognizing their importance in aligning shared goals.

## Partnerships approved in 2022/23

- ✓ Memorandum of Understanding between the ICO and the Global Coffee Platform ([ICC-136-6](#))
- ✓ Cooperation framework between the ICO and Coffee Training Center (CTC) of Ethiopia ([ICC-136-7](#))
- ✓ Memorandum of Understanding between the ICO and the Specialty Coffee Association (SCA) ([ICC-136-8](#))
- ✓ Letter of Intent by the ICO and ILO
- ✓ Memorandum of Understanding between the ICO, ITC and the C4CEC ([ICC-137-3](#)) <sup>1</sup>
- ✓ Memorandum of Understanding between the ICO and ITC ([ICC-137-4](#)) <sup>1</sup>



<sup>1</sup> Approved in coffee year 2022/23, with subsequent revisions of the legal text validated by the ICC in March 2024.

# Promoting consumption

The Secretariat continued to support Members through regional programmes to promote domestic consumption and create value addition, financed by the ICO Special Fund. While the regional programme for Latin America implemented by PROMECAFE ended the previous coffee year, we continued to monitor the implementation of ICO Special Fund activities in Africa and in Asia.



In Africa, the selected implementing partner, the Inter-African Coffee Organization (IACO), carried out an analytical review in selected countries, aiming to capture relevant information on investment opportunities in the coffee processing sector and the potential of domestic coffee consumption. Coffee consumption outlets known as coffee kiosks were established in Cameroon, Democratic Republic of Congo, Gabon, Ghana, Kenya, Rwanda, Togo and Uganda. The project also supported the capacity building of local roasters and café operators, and positive communications on coffee consumption and health were developed in collaboration with scientific experts to target the youth population, i.e. future coffee consumers.

## Coffee sector development projects

The ICO supports Members and coffee stakeholders in the design, fundraising, implementation, monitoring and evaluation of technical cooperation projects, with a focus on public-private partnerships.

During coffee year 2022/23, the Secretariat continued to identify opportunities to provide relevant assistance to Members. The Africa Coffee Facility (ACF), the main project proposal designed to transform Africa's coffee sector into a vibrant and resilient industry, was submitted to the African Export-Import Bank (AFREXIMBANK), a regional African trade development financial institution. To assess the financial support for the project, the AFREXIMBANK allocated a seed fund to the IACO to carry out a study entitled "Rapid appraisal of the financing landscape for the coffee sector in Africa" to identify business opportunities in the African coffee sector. The Secretariat provided technical assistance to IACO for this study and the lead consultant was CAB Africa

# ICO Coffee Public–Private Task Force: research projects and engagement in producing countries

During coffee year 2022/23, the CPPTF’s Technical Workstreams (TWs) carried out a number of projects in Angola, Ethiopia, Honduras, Indonesia, Kenya, Mexico, Peru, Rwanda, Togo, and Vietnam. Under the Global Living Income Accelerator Project, with contributions from JDE Peet’s, Louis Dreyfus Company, Nestle, Neumann Kaffee Gruppe, Ofi, Starbucks, Sucden, and Tchibo, several living income benchmark studies were conducted in ICO Member countries. CPPTF projects and interventions focused on field work and supported the coordination of country-level public-private dialogues, data collection and analyses, and capacity building.

Several living income benchmark studies were implemented in producing countries. More detailed and focused activities took place in Mexico and Rwanda, where living income benchmarks were integrated, costs of production assessed and policy recommendations made to close any gaps. Similar studies were conducted in Angola, Ethiopia, Honduras, Indonesia, Togo, and Vietnam, which will be expanded further in the coming months. In some of these countries, the TWs delved deeper into understanding disparities in living income. The CPPTF also supported efforts to convene public and private stakeholders in certain countries, including Mexico, Peru, and Rwanda, to deliberate on findings and initiate discussions on how to close the living income gap. A significant milestone was the completion and publication of the benchmark in Peru.

## Coffee Public-Private Task Force Engagement in Producing Countries

- 1 Mexico
- 2 Honduras
- 3 Colombia
- 4 Peru
- 5 Brazil

- 6 Sierra Leone
- 7 Togo
- 8 Angola
- 9 Democratic Rep Congo
- 10 Ethiopia
- 11 Kenya
- 12 Rwanda

- 13 Vietnam
- 14 Indonesia
- 15 Papua New Guinea

ICO Taskforce projects & interventions, research initiatives, field activities, and support to the coordination of national dialogue.



# Advocacy and communications

## International Coffee Day 2023: #CoffeePeople

On 1 October every year, International Coffee Day is celebrated by the 77 Member States of the ICO along with thousands of coffee associations and consumers worldwide. In 2023, the ICO, through an innovative and successful partnership with the ILO, launched the #CoffeePeople campaign to promote safer and healthier working conditions across the C-GVC.

Due to the outreach power of the ILO, the campaign successfully reached 25 million individuals across 50 countries, boasting 135,000 engagements, and garnered significant support from officials, growers, and organizations.

The key messages focused on the need for safe and healthy conditions, prevention of production-related injuries and diseases, and the vital role of sustainable, responsible and inclusive workplace practices in ensuring decent work, particularly with regard to gender, as 70% of coffee labourers are women.



The campaign devised a call to action via a social media challenge, where coffee stakeholders were encouraged to share images of themselves holding a cup of coffee with the slogan "The secret to great coffee is people!" alongside the #CoffeePeople hashtag. 2,200 individuals participated, amplifying the campaign's message and rallying support for the safety and well-being of coffee workers globally.



# Global engagements



**1.** 10-14/10/22: ITC partnerships meetings + 14th Swiss Coffee Forum, Switzerland

**2.** 27-29/10/22: 10th edition of Triestespresso Expo 2022, Italy

**3.** 13-15/11/22: 62nd annual meeting of the Inter-African Coffee Organization, Togo

**4.** 17-18/11/22: Illy Caffè Award + Colloquium "The future of the coffee sector", Italy

**5.** 23-26/11/22: PROMECAFE's IV Sustainability Summit, Honduras

**6.** 13/12/22: ASEAN Coffee Federation and ICO + celebration of ICD, Vietnam

**7.** 14-15/12/22: CPPTF meetings, private sector engagement + WCPF, USA

**8.** Jan-Feb/23: ITC, EU, OACPS Secretariat, and private sector stakeholders "CS3D readiness", Uganda

**9.** 13-14/02/23: III World Coffee Producers Forum, Rwanda

**10.** 15-17/02/23: 19th AFCA 2023, Rwanda

**11.** 26-27/02/23: EU Commissioner ENV + EU DG INTPA + Civil Society group, Belgium

**12.** 9-11/03/23: National Coffee Association Annual Convention, USA.

**13.** 18-20/04/23: British Coffee Association Seminar, United Kingdom

**14.** 19/04/23: LIDE Brazil Conference, United Kingdom

**15.** 25-27/04/23: Mission to Brussels, Belgium

**16.** 7-9/05/23: Mission to UNIDO, Austria

**17.** 11/05/23: Amsterdam Declaration Partnership event, United Kingdom

**18.** 15-16/05/23: Mission to Berlin with GIZ, Germany

**19.** 28-31/05/23: Trip to Espírito Santo with CPPTF and NCA, Brazil

**20.** 4-9/06/23: Mission to Yaoundé, Cameroon

**21.** 22-24/06/23: World of Coffee, Greece

**22.** 3-5/07/23: EUSPA meetings, Czech Republic

**23.** 26-28/06/23: GCP meetings, Germany

**24.** 20-23/08/23: Mission to Mexico City, Mexico

**25.** 13/09/23: World Coffee Summit, United Kingdom

**26.** 19-22/09/23: SCTA Dinner and related events, Switzerland

**27.** 23-29/09/23: 5th World Coffee Conference, India

## Media coverage of the ICO

Several media articles and reports referenced ICO data and inputs on topics such as coffee market trends, supply chain issues, and the regulatory framework during the coffee year 2022/23. Some of these are listed below:

**09/11/2023.** I-CIP volatility remains stable: ICO October Report [Global Coffee Report \(gcrmag.com\)](https://www.gcrmag.com).

**02/10/2023.** ICO and GCP renew commitment to coffee sustainability [Global Coffee Report \(gcrmag.com\)](https://www.gcrmag.com).

**2/05/2023.** What the European Regulation on deforestation-free supply chains means for the global coffee industry [Global Coffee Report \(gcrmag.com\)](https://www.gcrmag.com).

**09/08/2023.** ICO and Coffee Board of India to host fifth World Coffee Conference [Global Coffee Report \(gcrmag.com\)](https://www.gcrmag.com).



## Resources for action

The ICO translated and published documents in its four official languages, ensuring the accessibility and clarity of information across diverse audiences. Through these supportive activities, the ICO strengthened its overall effectiveness and efficiency in achieving its objectives.



## Finance and administration

The ICO's administrative costs are financed by contributions from Members based on their average coffee exports or imports. Additional funding was gratefully received through voluntary donations from ICO Members and private sector partners. Major donors among ICO Members included Germany, the European Union, Italy and Switzerland.

## Programme of Activities

The ICO's annual Programme of Activities is designed to support the implementation of the Five-Year Action Plan 2017-2021, which remains operational during the transitional period between the ICA 2007 and the entry into force of the ICA 2022. Its primary objectives include facilitating understanding of new regulations, such as the EUDR and the CS3D, within the coffee sector. Additionally, it aims to identify strategic and technical solutions for compliance while fostering new and effective partnerships. These partnerships enable ICO Members to access increased funding, resources, and expertise, ultimately advocating for a more relevant, effective, inclusive, and resilient coffee sector.

The Programme of Activities outlines the Organisation's overarching direction and addresses the growing challenges confronting the coffee industry. Details of the Programme of Activities for coffee year 2022/23 can be found in document [ICC-134-7](#).

## ICO Secretariat

The ICO headquarters is located at 222 Gray's Inn Road, London, United Kingdom. For coffee year 2022/23, there were 13 approved posts, and the Secretariat was also supported by one part-time graphic design/communications consultant.

## Officeholders 2022/23

The Officeholders for the 2022/23 coffee year can be found online [here](#).

# Conclusions & next steps



**Focus**  
of the  
Secretariat's  
activities



Looking ahead to the 2023/24 coffee year, the ICO remains committed to innovation, efficiency, and cost-saving. It pledges to engage and mobilize more resources and partners to support ICO Members and the entire C-GVC, and to improve sustainability and social and economic conditions for farmers. The Secretariat will be focusing on:



- Assisting Members and their farmers and industries to assess and navigate emerging regulations;
- Benchmarking and closing living income gaps in ICO Member countries to enhance farmers' prosperity;
- Advancing circular economy initiatives;
- Advocating for the coffee sector at all international forums to promote coffee diplomacy and attract more attention and resources in favour of greater resilience and sustainability; and
- Achieving key deliverables for 2023/24.

## Coffee Development Report 2022/23



Finalizing the Coffee Development Report (CDR) 2022/23 on the circular economy and the promotion of the C4CEC as an effective tool to collect, analyse and share information, as well as to implement cost-effective solutions to increase income and job opportunities through circularity and regenerative agriculture, thereby combating climate change and reducing environmental impact.

## Financial support to fight climate change and foster farmers' resilience



Engaging with and mobilizing countries and development and financial partners, as well as the private sector and their foundations, to establish financial mechanisms that support coffee producers with climate change mitigation and build farmers' resilience.

## Implementation of the CPPTF's 2030 Roadmap



Driving with stronger emphasis the implementation of the 2030 Roadmap by strengthening the CPPTF and its TWs. This will involve actions to close income gaps, foster market transparency, develop better policies and institutions, and foster resilient coffee landscapes both in ICO importing and exporting countries, with a particular emphasis on farmer communities

## Multilateral advocacy and promotion of coffee consumption



Advocating for the coffee sector among consumers, donors, and financial institutions and multilateral platforms, including applying for recognition at the UN General Assembly to bring coffee matters to the highest multilateral political level. This effort aims to raise awareness about challenges and opportunities, forge new partnerships, open market opportunities and secure more expertise and funding for coffee farmers and exporting countries.

## Enhanced statistical services



Expanding ICO statistical services to provide Members and the broader coffee market with more data, better analysis and insights into trends and emerging issues to facilitate informed decision-making and attract more subscribers and partners.

## Entry into force of the ICA 2022



Advancing the signature and ratification of the ICA 2022 and preparing all supporting documents required for the entry into force and execution thereof. Efforts will focus on the Terms of Reference and mechanisms of the Board of Affiliate Members and Coffee Public-Private Working Party, on regaining former and attracting new Members, and on gender equity and youth empowerment.

## Empowerment and inclusion



Accelerating gender equity and empowering women within the C-GVC and providing more opportunities for young people while ensuring the safety, respect, recognition, and fair remuneration of coffee workers across the sector.

## Trends and projections



Regarding the coffee market, while weather conditions and financial actors will contribute to determining prices and volatility, coffee consumption is expected to continue to rise. However, conflicts and instability, as well as speculation, may affect the magnitude of this trend and determine the production-consumption balance.



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