

The Coffee Guide

Fourth edition



International
Trade
Centre

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TRADE IMPACT
FOR GOOD

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ABOUT THE GUIDE

The Coffee Guide is the world's most extensive, hands-on and neutral source of information on the international coffee trade. It covers trade issues relevant to coffee growers, traders, exporters, transportation companies, certifiers, associations and authorities, and other relevant actors. Many in the coffee industry consider it the go-to reference.

This fourth edition is directly informed by the coffee industry. It has updated technical information on finance, food safety measures, logistics and contracts. It has redefined quality and data segmentation and expanded digitalization coverage and information related to certifications and supply chain legislation. It also gives prime importance to issues like climate change, coffee price volatility, living wage and the inequitable distribution of power, profit and resources across the supply chain. It aims to be informative, useful and inclusive of all sector stakeholders.

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FOREWORD

We welcome the publication of this fourth edition of The Coffee Guide. It is part of our work to support a transformation of the coffee industry towards one that focuses on product, competitiveness and quality – while prioritizing people and planet. It reflects my wish to ensure that ITC's technical assistance helps our partners countries reverse centuries of commodity dependence, turning exports into diversified growth and poverty reduction.

This edition reflects changes in the last 10 years and new dynamics that have come into play. First published as *Coffee - An exporter's guide* in 1992 and subsequently updated in 2002 and 2012, this practical handbook has become the world's most extensive publication on the international coffee trade.

Disruptions and changes in the coffee industry have punctuated the successive editions of this guide. This continuum has rendered tremendous opportunity for stakeholders to upgrade their roles in the global coffee value chain.

The guide retains the essence that has made it so popular over the years, with neutral, hands-on information from seed to cup. It addresses value chain stakeholders across all countries that produce and consume coffee. An overview of the coffee world is accompanied by advice on sustainable practices and competitiveness, certification, contracts, logistics, insurance, arbitration, futures markets, hedging, risk management, quality control, digital tools and more.

The third coffee wave has significantly reshaped the sector, bringing high-quality coffee and sustainability principles to consumers and value chain operators alike. Since the last edition, this niche concept has been scaled up through the medium of a 'premium' market segment: good-quality coffee accessible to mainstream consumers, centred around values of sustainability.

Today, we recognize a coffee market segmentation that this guide defines as standard, premium and specialized. This evolution towards higher-value markets underlines changing consumption patterns. To succeed, a product now requires economic and social impact. Consumers and producers start to associate product quality with sustainability, and consider how it affects the environment and the lives of the people 'behind the cup'.

As part of this shift, we must ensure that gains are shared fairly across the supply chain. A coffee sector that values people and planet while enabling profit for all needs a competitive private sector. This includes producers, smallholder farmers, exporters, roasters and consumer-facing companies. It requires resilience from within, built through partnerships and investment, along with improved sector-specific policies and governance.

The time has come for the industry to build back better, but with the right foundations. Together we can tackle persistent and new issues and respond to opportunities. Farm-level income must grow sustainably to secure the coffee industry's future. Public-private partnerships, alliances between supply chain operators, and policy are also instrumental to drive it towards widespread change. This guide is a step towards providing insights into making this possible.

We are committed to advancing the Sustainable Development Goals in the coffee sector, targeting inclusive growth through joint action. The International Trade Centre's Alliances for Action programme, which leverages partnerships for sustainable food systems, led this new edition. It is the result of an incredible exercise in co-creation, drawing on the contributions of many worldwide industry stakeholders from across the value chain. This approach makes the guide as inclusive of all readers as possible, and presents realities and opportunities in the coffee sector today.

We wish to thank the many industry experts, companies and institutions that contributed to this guide. We hope it continues to serve as a vital training and knowledge-sharing tool to advance the interests of producers, exporters and those who support them in coffee-producing countries around the world.



Pamela Coke-Hamilton
Executive Director
International Trade Centre

NOTE FROM THE AUTHORS

With this fourth edition of *The Coffee Guide*, we hope to mark a turning point for this pivotal publication that both honours its legacy and improves its relevance to the coffee industry today.

Our goal is to shift from a document that is updated every decade to a dynamic knowledge and information hub that contributes to a transformative solution for the people and planet behind coffee.

This comprehensive edition will be followed by standalone versions of the chapters, each with toolboxes of useful resources, on the same platform. These form part of our efforts to make this document as user-friendly and useful as possible to all readers.

We plan to capitalize on the coffee industry network that actively contributed to this edition, both for an accurate description of the sector in this publication and to feed into future ongoing efforts to keep its data and information updated, accurate and inclusive in stakeholder representation.

The coffee sector is a dynamic environment, ruled by volatile market prices, uncertainties linked to climate change, advancing technology and changing consumer patterns, to name a few. Over the short course of updating this guide alone, several drastic events shook the industry, from a global COVID-19 pandemic to hurricanes in Central America to a severe frost spell in Brazil. Positive changes are also afoot, such as greater value addition at origin and rising consumption in coffee-producing countries.

Persistent issues inherent to the current coffee supply chain system also remain. These include the generational issue, gender inequality, lack of a living income for producers and low enforcement of human rights due diligence.

Meanwhile, coffee demand continues to grow and shows no sign of abating.

The sector must be adaptable, resilient and strategic if it is to maintain healthy and inclusive growth. These qualities require joint action and a coalition of coffee stakeholders from across the chain. *The Coffee Guide* can play a role in this, raising awareness over time on the evolving issues that need to be addressed, the opportunities that should be explored, and mapping the best way forward.

The coffee network behind this guide is the tool that has enabled us to do that. We hope it will continue to do so from here onwards, so we can contribute together to shaping a coffee sector in which we can all take pride.

We hope you enjoy reading.

ACKNOWLEDGEMENTS

This new edition is the result of a co-creation process with coffee industry actors, from seed to cup. An advisory panel of more than 70 members from across the globe helped shape its structure and content.

The guide was made possible through the valuable contributions of the people and organizations below, whose guidance, expertise and time dedication are acknowledged with thanks and appreciation.

The following core team of authors led the work on this new edition:

Philip von der Goltz is the main technical author. He represents the coffee industry as Managing Partner of List + Beisler and as a certified Q Grader and is a consultant on coffee issues to the International Trade Centre (ITC).

Sarah Charles is the principal author of the early chapters of the guide. She also coordinated the update of contributions and new material and commissioned artwork. She writes for coffee publications and currently is the communications manager for ITC's Alliances for Action programme.

Hernan Manson is co-author of the guide. He provided the strategic direction and overall coordination for this edition. He is Head, Inclusive Agribusiness Systems, and co-manages the ITC Alliances for Action workstream.

Martina Bozzola is co-author of the guide. She advised and wrote on sustainable agriculture aspects. She is Senior Research Associate in Agricultural and Resource Economics, Zurich University of Applied Sciences, and Assistant Professor in Economics of Agriculture, Food and Health, Queen's University Belfast.

Tommaso Ferretti is co-author of the guide. He advised and wrote on finance and investment aspects. An adviser to ITC's Alliances for Action programme, he is a doctoral candidate at McGill University, where he focuses on how finance and investments for coffee shape innovation and sustainability in agricultural global value chains.

Eleni Gerakari is co-author of the guide. She provided backstopping, research and writing support. She is a technical writer and partnership coordinator for ITC's Alliances for Action programme.

Neil Rosser is co-author of the guide. He is the main contributor of the industry data. He has worked for most of the largest green coffee trade houses as commodity statistician for more than 30 years and was Vice Chairman of the International Coffee Organization Statistical Committee.

Natalie Domeisen led production management and advised on planning, structural, editorial and communications aspects. She heads ITC's publishing and events.

Jennifer Freedman served as chief editor, with Natalie Domeisen as contributing editor. **Anne Griffin** provided editorial and project management support. Design Plus services managed the design and layout, led by **Iva Stastny Brosig**. **Jasmine Massoumi** provided graphic illustrations for this edition.

ITC also wishes to thank **Morten Scholer** and **Hein Jan van Hilten**, who were responsible for the coordination and content of the third edition of the *Coffee Guide* and ensured continuity of the rich legacy of the ITC *Coffee Guide* in this fourth edition.

This edition's unique co-creation process with the industry was enabled by the generous, outstanding contributions of the following industry personalities and organizations:

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