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Ministry of Foreign Affairs

## EU Market Research - Guinea Coffee

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of Imports from developing countries (CBI)

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## **Acronyms**

ADECAM	Association de Défense du Café-Ziama Macenta
AFD	French Development Agency
ASL	Above Sea Level
CBI	The Centre for the Promotion of Imports from developing countries
CIRAD	Centre for International Cooperation in Agronomic Research
CITES	Convention on International Trade in Endangered Species of Wild Fauna and Flora
CLFZ	Child Labour Free Zones
CSR	Corporate Social Responsibility
DRC	Democratic Republic of Congo
EFSA	European Food Safety Authority
EU	European Union
GAP	Good Agricultural Practices
GDP	Gross Domestic Product
GI	Geographical Indication
HS	Harmonized System
IACO	Inter-African Coffee Organisation
ICO	International Coffee Organization
ILO	International Labour Organization
INS	Guinean National Institute of Statistics
IRAG	Institute of Agronomic Research of Guinea
ITC	International Trade Centre
ITFC	Islamic Trade Finance Corporation
ISO	International Standards Organization
IGO	Inter-Governmental Organization
KG	Kilogram
NGO	Non-Governmental Organization
NKG	Neumann Kaffee Gruppe
OAPI	African Intellectual Property Organization
PASANDAD	Accelerated Food and Nutrition Security and Sustainable Agricultural Development Program
RVO	Netherlands Enterprise Agency
SCAA	Specialty Coffee Association of America
SCAE	Specialty Coffee Association of Europe
SME	Small and medium-sized enterprises
UK	United Kingdom
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
USD	United States Dollar
USDA	United States Department of Agriculture
USP	Unique Selling Point

## **INTRODUCTION**

The Centre for the Promotion of Imports from developing countries (CBI) is part of the Netherlands Enterprise Agency and is commissioned by the Netherlands Ministry of Foreign Affairs. CBI connects small and medium-sized enterprises (SMEs) in developing countries to the European market and this way it contributes to sustainable and inclusive economic growth. CBI offers export coaching programmes for SMEs, involves the export enabling environment (e.g. business support organisations, governments) to improve their services for exporters and publishes every year over 250 market studies. Programmes are customized to the local situation, tackling those issues that impede export to Europe. CBI can work in over 35 countries and in 14 sectors.

CBI is currently developing a project to support Guinea's coffee sector. The country predominantly produces robusta coffee (as well as small quantities of arabica), and CBI would like to explore the potential of Guinea reaching specialty segments (specialty robusta and potentially arabica) on the European market.

There are some promising initiatives in the sector that CBI would like to build on. The country produces a specific type of high-quality robusta coffee, which is recognized under the geographical indication 'Ziama' by the African Intellectual Property Organization. The initiative has however been neglected over the past years and requires renewed attention. There are also some Guinean exporters with existing links to Europe, that CBI could support in expanding their exports and gaining access to new market segments. Finally, Guinea's government has launched an initiative to introduce arabica coffee in the country. Although presently the quantities grown are small, it is worthwhile exploring if this could create opportunities for Guinea on the European market.

The objective of this assignment is to provide in-depth information regarding sales markets, unmet market demand and international competitors in Europe for coffee from Guinea. This research prepared by SureChain consultants is based on existing CBI coffee market research (available on the CBI website), documentation provided as Terms of Reference, as well as additional sources (including interviews with relevant EU coffee stakeholders) identified by the consultant.

## CHAPTER 1. RESEARCH APPROACH

To implement the market research, desk-based research and interviews with relevant stakeholders were conducted. The desk research phase consisted of obtaining and analysing data from credible websites, databases and written sources:

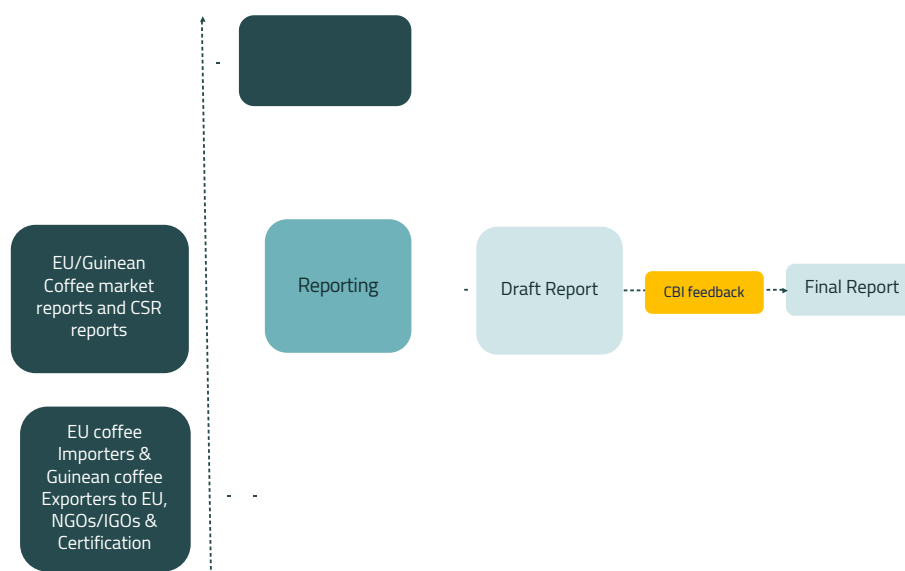
- Databases and websites assessed include, FAOSTAT, ITC Trade Map, ITC Sustainability Map, Resource Trade.Earth (Chatham House), OEC database, MVO CSR Risk Checker, ILO, ITC Export Potential Study (EPS), Wage Indicator, Gapminder.
- Written sources and reports used, include CBI coffee sector reports, ICO Market Report (production, export, prices), trade and market studies, local sector and industry reports, Guinea country factsheets and Export Strategy, Gender Global Report Index. See References for full indication of sources used in this research.

The consultants reached out to 25 stakeholders (e.g. EU coffee buyers, Coffee associations, NGOs/IGOs, Government trade agencies and certification schemes). About 60 percent of the stakeholders responded either by email, phone or with an interview on Skype or Zoom. The interviews were used to understand amongst others, their views on the market potential and competitiveness of coffee from Guinea as well as on key opportunities in the value chain and obstacles that hinder Guinean coffee exports to Europe. See Annex 1: List of Stakeholders that responded with input either via interviews or email. Questions were adapted to specific stakeholders. The consultants prepared and submitted the draft report based on input obtained from the desk-research and interviews. The final report was prepared after CBI feedback.

Table 1: Overview of Stakeholder Groups that were Interviewed

	EU Coffee Buyers	Coffee Associations	NGOs/IGOs	Certifications	Total
Responded	8	1	5	1	15
No Response*	4	1	3	2	10
* Note: We received responses from most of these, however, many indicated that they did not have experience in Guinea and as such could not help us further.					25

Figure 1: Simplified Schematic of the Research Approach



**Market data limitations:** Researchers observed that at times, breakdowns of coffee production and trade of robusta and/or arabica are either not available, not consistent or not detailed enough to allow for comprehensive market analysis of exports of specialty coffee. Some discrepancies in data were observed between the Guinean National Institute of Statistics (INS), USDA, Eurostat and ITC. Where this occurred, the researchers used their best judgement also in combination with anecdotal information gathered from interviewees and local sector experts in Guinea.

## CHAPTER 2. GUINEA COFFEE PRODUCTION, EXPORT AND MARKET COMPETITIVENESS

### 2.1 Coffee Production in Guinea

The following subsections analyze a range of data in relation to coffee production in Guinea. Issues covered include the economic role of coffee in Guinea, product type and varieties, and developments over the last 5 years in Guinea coffee sector.

#### 2.1.1 Economic Role of Coffee in Guinea

Coffee is a major cash crop for Guinea. It contributes about 0.3 percent of the country's GDP and 0.8 percent of its export earnings.<sup>1</sup> It is a source of income for thousands of small-scale farmers. Guinean coffee is not well established on the EU and international coffee market due to its perceived low standard of bean quality. Sector experts note that this is due to the fact that better quality coffee is not rewarded by Guinean traders. Value chain actors therefore prefer to focus on lower quality coffee (i.e. green coffee cherries harvested unripe to receive quick cash, improperly dried, unclean). This is largely exported to African countries (mainly Algeria, Morocco and Senegal).

#### 2.1.2 Production volume

Guinea produces 0.1 percent of the world's coffee production and is considered the 34<sup>th</sup> coffee producing country in the world. Available data on coffee production over the past 5 years have been inconsistent in figures but consistent in the fact that production volumes have been low. According to the USDA, during the 2018/2019 coffee season, Guinea produced 70,000 bags<sup>1</sup> of green coffee (about 4,200 tonnes); all of which were robusta. For the same season, the International Coffee Organization (ICO) estimated that Guinea produced about 248,000 bags of green coffee (14,880 tonnes). Tables 2 and 3 below show 5-year data estimates from USDA's Production, Supply and Distribution (PSD) database and ICO's Coffee production statistics. Both figures show a declining trend in production volumes for Guinea coffee between the 2015/2016 and 2017/2018 coffee seasons.

Table 2: Production of Coffee in Guinea (USDA, 2014 – 2019)

		2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
Commodity	Attribute	Unit ('000 60kg Bags)				
Coffee, Green	Arabica	0	0	0	0	0
	Robusta	150	280	200	190	70
	Total Production	150	280	200	190	70

Source: USDA Foreign Agriculture Service, "Production, supply and distribution", online: <https://apps.fas.usda.gov/psdonline/app/index.html#/app/advQuery>, viewed in May 2020.

Table 3: Production of Coffee in Guinea (ICO, 2014 – 2019)

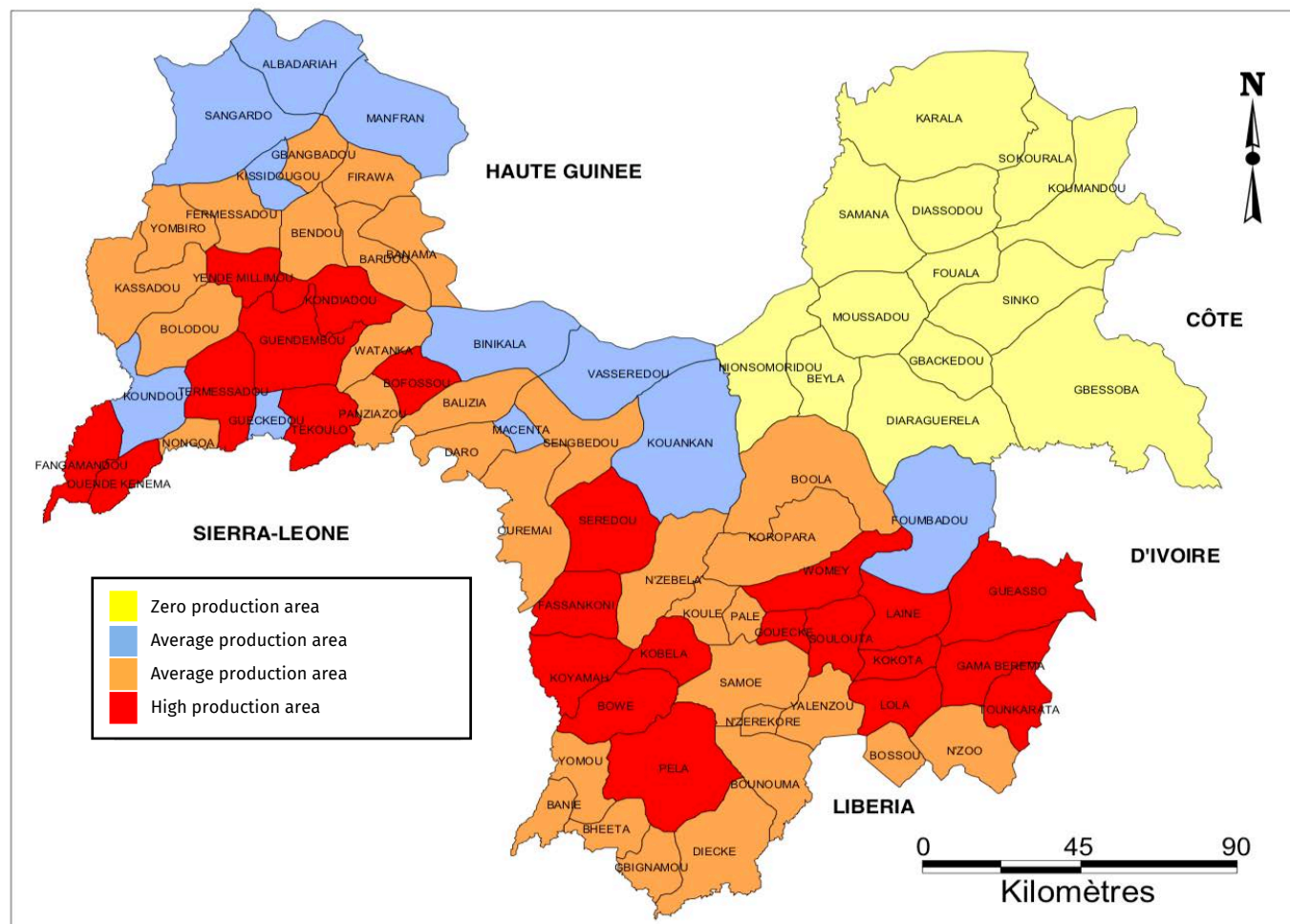
		2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
Commodity		Unit ('000 60kg Bags)				
Coffee, Green (total production)		--	286	270	229	248

Source: ICO, "Crop year production by exporting country", online: <http://www.ico.org/prices/po-production.pdf>, viewed in May 2020.

The production volume in Guinea is so low that some experts believe that most of the Guinean exported coffee may be coming from the Cote d'Ivoire. Nevertheless, Guinea is known to have coffee plantations in 15 of its provinces. There are more than 210,000 hectares of coffee bushes in Guinea. The Western Highland has the highest level of coffee production, followed by the Eastern Highlands.<sup>2</sup> Two main geographic features of Guinea (elevation > 800 m ASL) the Fouta Djallon plateau and the Ziama massif with its northern extension are considered important for coffee production in Guinea. Additionally, robusta and arabica are being cultivated around Mount Nimba, a mountain along the border of Guinea and the Cote d'Ivoire.

<sup>1</sup> 60kg bags

Figure 2: Coffee Production areas in Guinea according to the Sub-prefectures



Source: LAMAH D., Fond de carte du CRRA-S / Macenta September 2011

### 2.1.3 Product types/varieties

Commercially, Guinea cultivates mainly robusta coffee and to a lesser extent arabica. *Coffea Canephora*, Mauritania and Liberia are all original varieties of robusta native to tropical Africa, between Guinea and Uganda. “*Coffea stenophylla*” – a particularly small-leaved plant that grows to a height of 700m and “*Coffea affinis*” are also said to have originated from Guinea.<sup>3</sup> Research shows that these two lesser known coffee varieties “may possess useful traits for coffee crop plant development, including taste differentiation, disease resistance, and climate resilience” for Guinea.<sup>4</sup>

According to the natural conditions of the country, notably those linked to the altitude, two main regions of predilection for coffee cultivation exist in Guinea: Forest Guinea for robusta coffee, and Middle Guinea for arabica coffee.

- *Coffea Canephora* (Robusta): Robusta was discovered in West Africa between Guinea and Uganda. Some of the varieties were discovered in Macenta and Forest Guinea areas, during the colonial era. It is said that coffee from the Macenta area is used to ‘enhance the base note of coffees from other parts of the country and the Cote d’Ivoire’. At least 95 percent of the coffee grown in Guinea is the robusta variety, which is produced at high elevations and is said to be of good quality. According to historic data, during the early 60s, Guinean coffee quality was very good and about 90 to 95 percent exports were graded as superior.

Ziama Macenta robusta coffee is one of only 3 African products that has a protected geographical indication issued by the African Intellectual Property Organization. This robusta coffee with exceptional qualities is grown in Forest Guinea on Mount Ziama in the sub-prefectures of Orémaï, Sengbédo, Sérédou, Fassankoni, Kouankan and Zébéla. It has



characteristics that bring it closer to an arabica: tangy flavour, slight bitterness, high aromatic intensity, and a strong persistent aroma. The shape is half-circle, slightly tapered.<sup>5</sup>

- Coffea Arabica (Arabica): Arabica was first introduced in Guinea during the 20<sup>th</sup> century. Historically, it was first cultivated in the Fouta Djallon mountain area. Unfortunately, there was very little success as during the eve of the Second World War, the annual output of coffee in Guinea amounted to only 2,200 tonnes.<sup>6</sup> Guinean Arabica has a delicate aroma and taste. Guinea Arabica coffee needs a temperature range of between 18°C and 24°C and altitudes from 1,400 to 2,000 meters with rainfall not less than 1,000 millimetres per year. Arabica berries ripen in 6 to 8 months.<sup>7</sup>

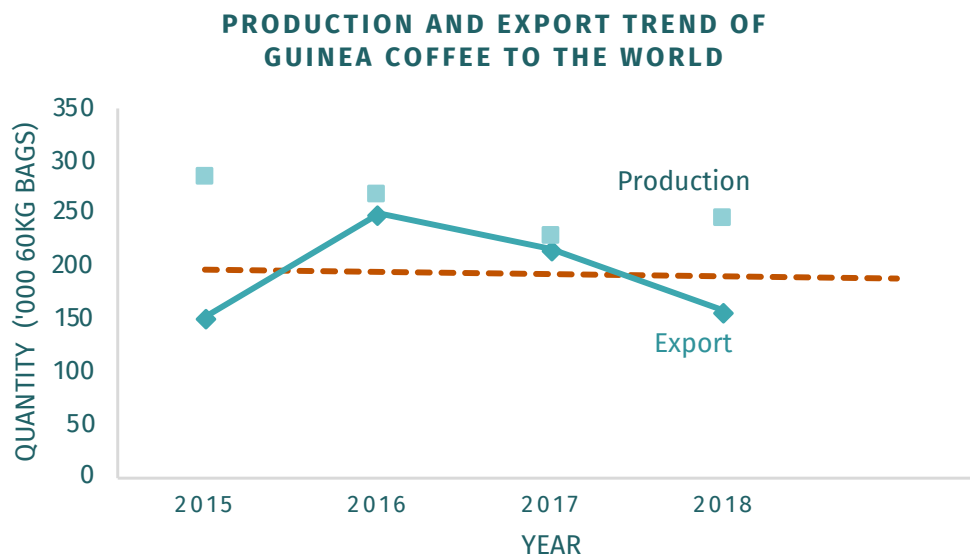
## 2.2 Guinea Coffee Exports (volume and value and destination)

Harmonised System (HS) codes are used to classify products and to calculate international trade statistics, such as imports and exports. Coffee exports are categorized as: Roasted, decaffeinated coffee (HS code 090122); Decaffeinated coffee (excluding roasted) (HS code 090112); Coffee (excluding roasted and decaffeinated) (HS code 090111), and Roasted coffee (excluding decaffeinated) (HS code 090121). The focus of this study was on green coffee beans, which are classified in HS codes 090111 (coffee, not roasted, not decaffeinated). It is important to note that the available data from most of the sources do not distinguish between conventional, certified, niche and specialty coffees.

### 2.2.1 Export volume

Almost all the coffee produced in Guinea, goes to export. According to ICO data, there was a sharp increase in Guinea coffee exports in 2016, but in 2017 and 2018, the sector showed continuous decline going back to the levels of 2015. The fluctuating world market price for coffee is said to have affected the sector. Furthermore, the sector’s production in 2017 was severely impacted by the after-effects of the Ebola pandemic which officially claimed more than 11,000 lives in Guinea. It is not entirely clear if there were other factors responsible for this decline (of both production and export) in 2017. However, sector experts indicated that since then, a key factor sustaining this downward trend in export, is the market’s reaction to the heightened political instability in Guinea since 2018/19.

Figure 3: Coffee Production and Export Trend of Guinea Coffee to the World



Source: International Coffee Organisation (ICO), “Crop Production by Country” online: <http://www.ico.org/prices/po-production.pdf>, viewed in May 2020 and “Exports of all forms of coffee by all exporting countries”, online: <http://www.ico.org/historical/1990%20onwards/PDF/2a-exports.pdf>, viewed in May 2020.

### 2.2.2 Export Share

ICO data shows that Guinea exported about 9,420 tonnes of coffee in 2018/19, all of which appears to be robusta. Guinea's share of the world's total coffee exports is around 0.1 percent. There are no available data on margins for exported products divided by mainstream and specialty.

Table 4: Export of Coffee from Guinea (ICO, 2014 – 2019)

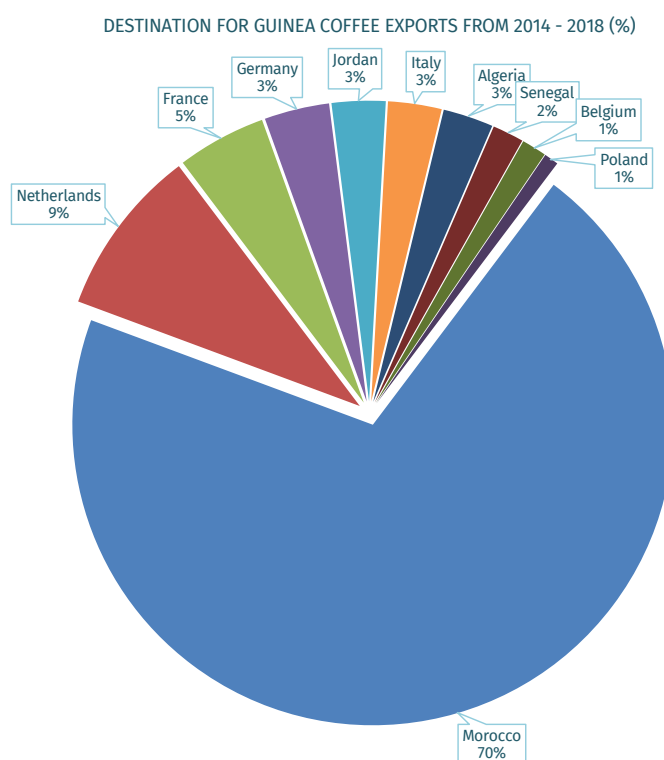
	2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
Commodity	Unit ('000 60kg Bags)				
Coffee, Green (total export)	--	152	250	216	157

Source: ICO, "Exports of all forms of coffee by all exporting countries", online: <http://www.ico.org/historical/1990%20onwards/PDF/2a-exports.pdf>, viewed in May 2020.

### 2.2.3 Export Destination

The graph in figure 4 below shows the top 10 export market destination for Guinea coffee from 2014 - 2018. About 70 percent of Guinea coffee is exported to Morocco. Based on total aggregated green coffee volume data, Guinea's top five EU export market destinations during the five-year period are: the Netherlands, France, Germany, Italy and Belgium.

Figure 4: Destination for Guinea Coffee Exports by % (aggregated 2014 – 2018)



Source: Graph developed based on data from Chatham House's resourcetrade. earth database: <https://resourcetrade.earth/data?year=2018&exporter=324&category=904&units=value>, viewed in May 2020.

## 2.3 Developments and expectations over the last 5 years

### 2.3.1 Key Developments over the last 5 years

Historically, the agricultural sector in Guinea has experienced several developmental policy changes and the Coffee sector is said to have experienced significant historical neglect for decades.<sup>8</sup> Recently, during 2015 – 2016, the country suffered from the Ebola crisis, losing more than 11,000 lives and adversely impacting the economy. The coffee sector was also impacted, and despite some initiatives by the government in 2016 (after the Ebola crisis in Guinea), the sector is yet to recover fully.

In 2016, the President of Guinea introduced a programme - 'Accelerated Food and Nutrition Security and Sustainable Agricultural Development Program of Guinea (PASANDAD), 2016-2020'. PASANDAD (which is expected to cost USD 1.8 billion) is a crucial part of Guinea's National Economic and Social Development Plan 2016-2020, which was set up as part of the Ebola recovery efforts. It is being led by the Minister of Planning and International Cooperation (MPCI). Specifically, one of PASANDAD's aims is to promote agricultural products for export, focussing largely on Coffee, Cocoa and Cashew. Since 2016, PASANDAD has focused on developing Guinea's arabica coffee production (in Fouta Djallon and in Forest Guinea), with the aim of enabling farmers to make a decent living and for the government to recover and boost its foreign revenues from coffee. Subsequently, in May 2018, the Guinean President launched an initiative aimed at producing nearly 4 million coffee plants in eight prefectures, with arabica coffee seeds from Rwanda. The President is said to have received 1 ton of arabica coffee seeds from Rwanda,<sup>2</sup> which he entrusted to the Institute of Agronomic Research of Guinea (IRAG) and other schools of agriculture, to be cultivated for educational purposes. It is still unclear if this initiative will succeed in boosting the production and quality of Guinea's arabica coffee; however, it is worth noting that according to forecasts, it was expected that by June 2019, around 3 million plants would have been sold to coffee farmers at affordable prices.

*Geographical Indication (GI) Potential:*<sup>3</sup> During 2014/15, the Ziama-Macenta coffee GI was recognized by the Organisation Africaine de la Propriété Intellectuelle (OAPI) and granted the GI 'label' for green coffee. This means exporting GI coffee following the GI product specifications (or code of practice), and traceability is carried out from the production zone (farmer groups) to exports (jute bags with a GI seal).

According to an UNCTAD report, the promotion of Ziama-Macenta coffee quality under the GI seal has been a success, because it enabled an average price premium of 17.5 percent compared with the Guinean coffee market price for the first and second exported containers of Ziama-Macenta coffee.<sup>9</sup> Although this development currently benefits the WOKO cooperative as they now export directly to Europe at good prices, this GI seal now has a potential to benefit other cooperatives. In addition to this, the report notes the following:

*"The GI recognition had a positive impact in terms of local reputation. Guinean people are proud of having one of their products recognized as a GI, which is also acknowledged and studied by international researchers. A direct consequence has been the strong support of local authorities, namely by facilitating export procedures, public funding (research and national projects), and by promoting the development of a local GI coffee market. In Macenta, several general assemblies have been organized to raise awareness, to facilitate coffee export, to negotiate prices, to explain the GI strategy and to discuss local development issues. In particular, key priorities are local job creation, infrastructure and ecotourism development, direct sale of Ziama-Macenta coffee, and promotion of other local products and handicrafts. Additionally, potential environmental spill-over effects due to the GI recognition of Ziama-Macenta robusta coffee may be reached. According to the United Nations Educational, Scientific and Cultural Organization (UNESCO), "Ziama Forest is a refuge for several rare, vulnerable and threatened species. It is home to 22 species of mammals protected under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES). In addition, the forest is one of the most important habitats for endemic species of the large upper Guinean forest block, between Sierra Leone, Liberia and Côte d'Ivoire". A strong inter-professional organization such as ADECAM has the potential to work with farmers in the zone, and therefore the organization could be used to raise awareness among the local population regarding the importance of forests, and to facilitate dialogue and exchange between local authorities and the population".<sup>10</sup>*

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<sup>2</sup> Guinea imported three varieties: BM-139 or Bourbon-Mayaguez (2 400 t/ha), Jackson-2 (2 500 t/ha) and Rab-C15 (3 000 t/ha).

<sup>3</sup> The World Intellectual Property Organization (WIPO) states that a geographical indication (GI) is a "sign used on products that have a specific geographical origin and possess qualities or a reputation that are due to that origin. In order to function as a GI, a sign must identify a product as originating in a given place. In addition, the qualities, characteristics or reputation of the product should be essentially due to the place of origin. Since the qualities depend on the geographical place of production, there is a clear link between the product and its original place of production". (See: [https://www.wipo.int/geo\\_indications/en/](https://www.wipo.int/geo_indications/en/))

### 2.3.2 Expectations on short term

Experts do not see much changes on the short term for Guinean coffee prospects in the European market, however they note that with external support and consistent government attention, the prospects could possibly improve. Reference is made of the fact that the Government of Guinea is increasingly becoming keen on making some improvements in the sector. Guinea will also be counting on its robusta coffee, Ziama de Macenta which was given the protected geographical indication (GI) label after a four-year approval process from the African Intellectual Property Organisation (OAPI), with the support of the French Development Agency (AFD) and the Centre for International Cooperation in Agronomic Research (CIRAD). Furthermore, the success of companies like Macenta Beans in the gourmet robusta segment could prove the value of Guinean coffee, as they prepare to become active on the international market. Although, it is not yet known which EU coffee roasters buy robusta from Macenta Beans, it is noteworthy that the company has recently (early 2020) successfully harvested their first coffee season. The Head of Green Coffee Buying and Roasting at Coffee Circle (based in Germany) summarized his view of the robusta from Macenta Beans (after cupping) as full-bodied and balanced. He noted that the cleanliness of the cup also appealed to him because it is a rare sight for robusta.<sup>11</sup>

### 2.4 Developments in Guinean coffee exports to Europe

Europe forms an important export market for coffee from Guinea. Figure 6 illustrates EU imports of coffee from Guinea in the five-year period from 2015 to 2019. The import volumes are marked by considerable decline, ranging between 13,000 tonnes of green beans in 2015 and 6,800 tonnes in 2019. Similarly, the values of coffee imports to EU shows a sharp decline since 2015 (€2,5 million) to 2019 (€821,000). Therefore, overall trend during those five years is declining (in volume and values). As indicated earlier, sector experts attribute this five-year downward trend to three developments: (i) effect of fluctuating market prices for coffee at the time (ii) the impact of the Ebola pandemic in Guinea and (iii) negative market reaction to the increasing political challenges in the country.

Considering the current political instability in Guinea and the impact of COVID-19 to the coffee sector, an increase in exports and the potential to access new market segments seems unlikely on the short term. Longer term developments will critically depend on the practical execution and consequences of government economic policies as well as resources made available for the advancement of coffee production and processing in Guinea. Also, the prospect of more exports may be enhanced on the longer term should CBI become involved. The continued success of private initiatives such as Macenta Beans (for robusta), Ziama-Macenta coffee (for GI-labelled robusta), Café du Fouta Djallon (for arabica) and Café Monts Nimba (both robusta and arabica), is likely to improve access to niche and specialty market segments for Guinea coffee.

Ziama-Macenta Coffee is initiated by the Woko cooperative in Guinea, a 250-member cooperative supported by the AFD (French Development Agency). In 2013, the cooperative exported its first container to the EU (bought by Maison Jobin – now part of the Neumann Group), obtained the first GI label and is currently exporting under the Fairtrade-label conditions.<sup>12</sup> The Ziama-Macenta robusta is said to have characteristics similar to those of an arabica: “a slightly acid taste with little bitterness, high aromatic intensity and a persistent strong, fine aroma”, which is particularly due to the soil and microclimate around Mount Ziama in Forest Guinea.

Café Monts Nimba produces and sells ground and roasted beans in sachets (250kg and 1 kg) locally to high- end supermarkets and major hotel chains in Guinea. They produce both arabica and robusta coffee from the Mount Nimba and Guinea Forest area. The quality of their coffee products is quite high and potentially could be supported by CBI to improve and explore EU and international export market.<sup>13</sup>

Figure 5: Images showing Café Monts Nimba product (L) and timeline of development Ziama Macenta (R)

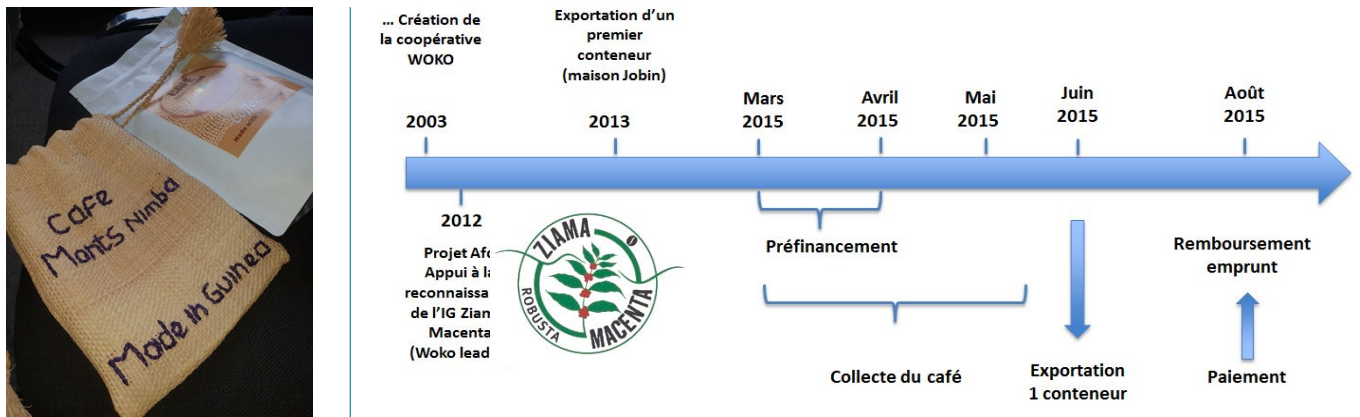
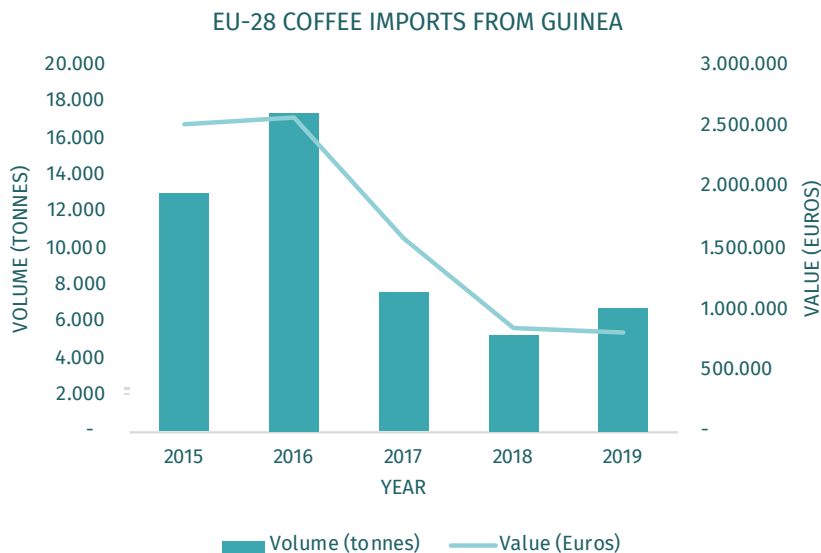


Figure 6: Trend of EU Coffee imports from Guinea (2015 – 2019)



Source: Graph developed based on Eurostat, “International trade in goods – detailed data”, viewed in May 2020.

## 2.5 Unique selling point for Guinea in exporting robusta coffee to Europe

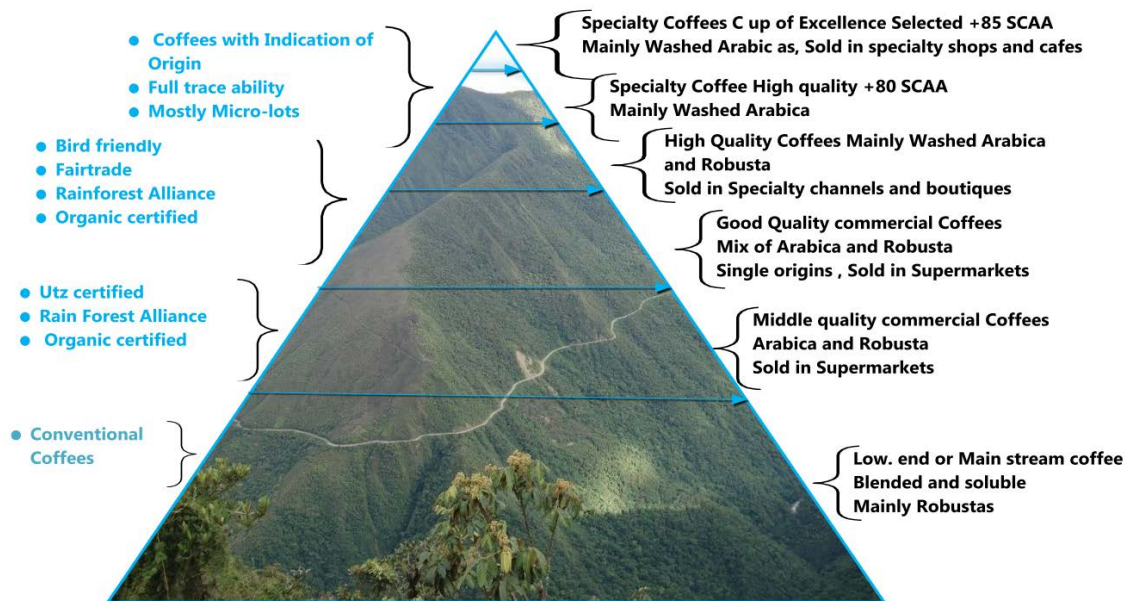
Currently, Guinea is producing and exporting robusta albeit in small quantities. According to IACO, some EU buyers that have experience with Guinea robusta offer positive reviews particularly on the quality of their beans (i.e. buyers from France, Belgium and Germany). Due to the lack of a standardized, widely accepted industry consensus and understanding on the definition of specialty coffee, there are no specific figures for the volume or share of specialty coffee produced in Guinea. Although, it is unclear whether Guinea coffee meets (or can meet) the SCAA or SCAE definition of specialty coffee, there seem to be some positive developments that could lead to a Guinea USP in exporting robusta to Europe.<sup>4</sup> So far, it appears that only Ziama-Macenta coffee is certified Fair trade and is being marketed as a GI-labelled coffee.

<sup>4</sup> The Specialty Coffee Association of Europe (SCAE) consider a specialty coffee “a crafted quality coffee-based beverage, which is judged by the consumer (in a limited marketplace at a given time) to have a unique quality, a distinct taste and personality different from, and superior to, the common coffee beverages offered. The

According to Coffee Barometer (2018), “today’s coffee trends include premiumisation, convenience, customisation, single-origin, and roast type. Consumers increasingly appreciate information about certified sustainable and ethically produced coffee”.<sup>14</sup> Specialty green Coffees (arabica or any other variety) can be divided into many categories as indicated in figure 7, the most widely known are the following:

- Coffees of Origin: or Single Origins, coming from a specific country, micro-lots, region or farm with unique and distinctive characteristics.
- Sustainable and organic Coffees: Cultivated without the use of agrochemicals including a CSR certification or label such as Fair Trade, Rainforest Alliance/UTZ, Bird Friendly or 4C certified.

Figure 7: Coffee segmentation based on quality



Source: CBI Tailored Market Intelligence: *Trends and Segments for Specialty Ugandan Coffee*. p.6

Based on these, there exists a potential specialty niche market for coffee Ziama-Macenta. The quality of Ziama coffee, a robusta variety, is clearly tied to a particular origin or territory and has a longstanding reputation (i.e. it was used during the colonial period to raise the quality of other coffee). The GI recognition can be Guinea’s USP for marketing its robusta in EU markets, because it already helped to generate better price for coffee farmers and will potentially catalyse other significant developments for communities in Macenta and the environment (e.g. protection of threatened species in the Ziama forest). Maison Jobin is said to have paid the Woko coffee cooperative USD\$ 150/ tonne above the market price for this coffee in the first container shipped and in 2015, USD\$ 200/ tonne above the price, for the second container.<sup>15</sup>

## 2.6 Potential on the European arabica coffee market

Guinea’s arabica coffee market is still at infancy. The country has potential to develop its arabica coffee market for export to Europe. However, this is not likely to be significant in the next 5 years and the goal would not necessarily be to become a competitor to the likes of Ethiopia and Uganda. Guinea’s biggest challenge would be how to enhance its production/yield, improve its product quality and ensure consistency in high quality arabica supply. Breaking into the EU market with a completely unknown arabica flavour/taste would require significant support from interested buyers. At the moment, there are only a handful of EU buyers that are familiar with Guinea coffee. Nevertheless, Guinea has some promising arabica initiatives such as Café Mont Nimba and Café du

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beverage is based on beans that have been grown in an accurately defined area, and which meet the highest standards for green coffee and for its roasting, storage and brewing.”

The Specialty Coffee Association of America SCAA defines specialty coffee as a product with attributes of quality and distinctiveness coming from a particular origin, which results in higher prices.

Fouta Djallon, which could use some serious off-takers to further expand on the potential and introduce Guinea to EU arabica coffee market.

**2.7 Exporters for the same coffee types**

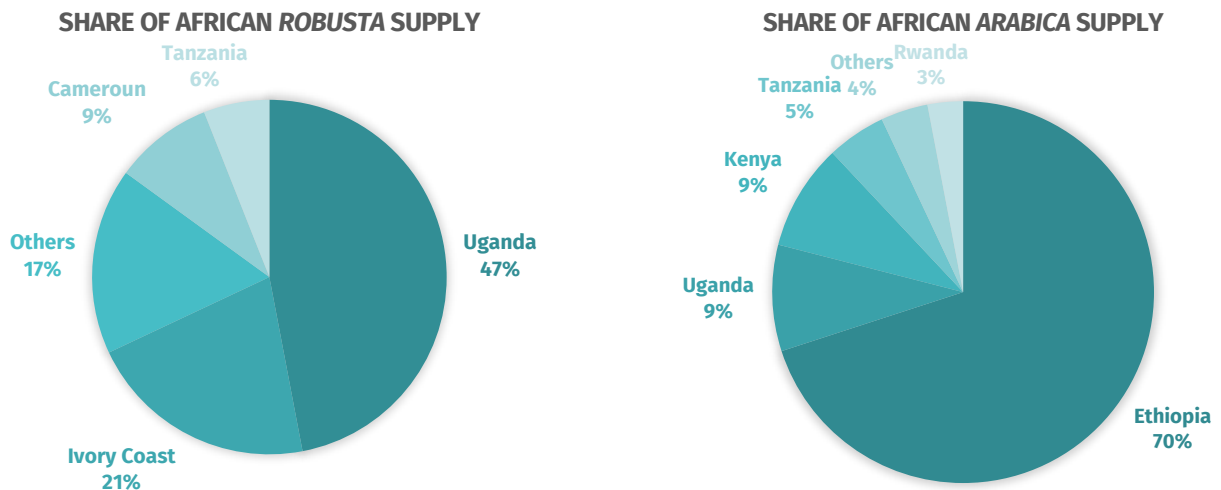
This section presents a comparison of Guinea to six African countries producing the same type of product(s) as well as the developments in terms of production in these countries. Figures 8 and 9 show these countries in the share of production, robusta and arabica supply.

Figure 8: Overview of main Producing African countries (by thousands of bags per year)



Source: Coffee Geek (2018) “Coffee Producing Countries: Africa”, online: <https://coffeageek.co/en/country-producers-cafe-africa/>, viewed in May 2020.

Figure 9: Share of African Robusta and Arabica Supply from top coffee African producing countries (%)



Source: Graphs were developed based on data from the International Coffee Organisation ICO”, online: <http://www.ico.org> viewed in May 2020.

**Ethiopia**

Ethiopia is the biggest coffee producing country in Africa both in quantity and quality and the 5<sup>th</sup> largest, globally. The coffea arabica plant originates from Ethiopia, which is why it dominates that market (with 70 percent share) among African countries. The country produces on average 384,000

metric tons of coffee per year which contributes up to 60 percent of its foreign earnings. Only arabica coffee is cultivated and exported from Ethiopia. Compared to Guinea, its production and export numbers over the past 5 years show a steady growth.

Table 5: Production and Export of Green Coffee: Ethiopia (USDA, 2014 – 2019)

		2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
Commodity	Attribute	Unit ('000 60kg Bags)				
Coffee, Green	Arabica	6475	6510	6943	7055	7250
	Robusta	0	0	0	0	0
	Total Production	6475	6510	6943	7055	7250
	Total Exports	3500	3405	3853	3893	3980

Source: USDA Foreign Agriculture Service, "Production, supply and distribution", online: <https://apps.fas.usda.gov/psdonline/app/index.html#/app/advQuery>, viewed in May 2020.

### **Cote d'Ivoire**

The country is ranked second among Africa's coffee producing countries. It produces medium quality robusta which makes it appealing for coffee buyers to use in blends. Its main EU importers are France and Italy. Compared to Guinea, coffee production (only Robusta) and export in the Cote d'Ivoire shows a growth trend.

Table 6: Production and Export of Green Coffee: Cote d'Ivoire (USDA, 2014 – 2019)

		2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
Commodity	Attribute	Unit ('000 60kg Bags)				
Coffee, Green	Arabica	0	0	0	0	0
	Robusta	1400	1600	1090	1250	2000
	Total Production	1400	1600	1090	1250	2000
	Total Exports	1350	1540	990	1150	1950

Source: USDA Foreign Agriculture Service, "Production, supply and distribution", online: <https://apps.fas.usda.gov/psdonline/app/index.html#/app/advQuery>, viewed in May 2020.

### **Cameroon**

Cameroon is a big producer of robusta, and a third of its harvest is a "Blue Mountain" arabica variety. Its arabica production data shows a steady trend, while similar to Guinea, the production and export of robusta shows a declining trend. Notwithstanding the relatively small quantities, its robusta production is significantly higher than that of Guinea.

Table 7: Production and Export of Green Coffee: Cameroon (USDA, 2014 – 2019)

		2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
Commodity	Attribute	Unit ('000 60kg Bags)				
Coffee, Green	Arabica	50	50	50	50	50
	Robusta	525	575	450	375	300
	Total Production	575	625	500	425	350
	Total Exports	500	540	430	350	275

Source: USDA Foreign Agriculture Service, "Production, supply and distribution", online: <https://apps.fas.usda.gov/psdonline/app/index.html#/app/advQuery>, viewed in May 2020.

### **Tanzania**

Tanzania produces good quality washed arabica coffee that is mild (softer and lighter with less intense acidity). The country produces about 6 percent of African robusta supply and 5 percent of African arabica supply. Its arabica (both mild and hard) constitutes between 60 – 79 percent of its annual exports by volume, while robusta accounts for the remainder. Although the quantity of Tanzanian coffee (both production and export) is relatively small, it is significantly bigger than



Guinea. The coffee sector in Tanzania suffered significant volatility over the past decade, but the last few years shows a steady growth trend. Experts attribute this to recent government policy changes in Tanzania coffee sector (e.g. coffee industry development strategy (2011 -2021) and the Coffee Directive 2018/2019).

Table 8: Production and Export of Green Coffee: Tanzania (USDA, 2014 – 2019)

		2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
Commodity	Attribute	Unit ('000 60kg Bags)				
Coffee, Green	Arabica	600	600	550	600	700
	Robusta	550	500	500	550	600
	Total Production	1150	1100	1050	1150	1300
	Total Exports	980	1120	1030	1030	1230

Source: USDA Foreign Agriculture Service, "Production, supply and distribution", online: <https://apps.fas.usda.gov/psdonline/app/index.html#/app/advQuery>, viewed in May 2020.

### Kenya

Kenya produces one of the world's best arabicas. Arabica coffee from Kenya is known for their strong or intense acidity which gives it a biting, fruity citrus taste. Kenya has a strict quality control process for bagging and labelling its coffee. But Kenya's coffee industry is said to be struggling as production levels have dropped and the younger generation shows little interest in farming.<sup>16</sup> The country's production and export numbers indicate volatilities in the sector. The country's national task force on coffee reforms prepared a report revealing that the sector was experiencing "unprecedented challenges which have drastically affected the production levels. Key among them: low earnings from coffee despite its premium quality, delayed coffee payments, mismanagement and inefficiencies in cooperatives, restrictive coffee laws, high cost of production and lack of direct access to the trading floor"<sup>17</sup>. In addition, according to one sector expert interviewed, these challenges largely stem from the fact that the sector is experiencing internal conflicts, exacerbated by the government's take-over of farmlands from major coffee producers. He further stressed that: "Some coffee farmers that have been producing for generations, have abandoned coffee to start producing other crops, because they can make a better yield and price from other crops. Our fear is that there will be no more Kenyan coffee in the next 5-10 years. A lot of buyers are abandoning Kenyan coffee, because it is so difficult to get it out of the country due to political issues".

Table 9: Production and Export of Green Coffee: Kenya (USDA, 2014 – 2019)

		2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
Commodity	Attribute	Unit ('000 60kg Bags)				
Coffee, Green	Arabica	750	750	815	715	775
	Robusta	0	0	0	0	0
	Total Production	750	750	815	715	775
	Total Exports	730	750	765	700	815

Source: USDA Foreign Agriculture Service, "Production, supply and distribution", online: <https://apps.fas.usda.gov/psdonline/app/index.html#/app/advQuery>, viewed in May 2020.

### Uganda

Uganda is the second biggest coffee producing country in Africa, and the 8<sup>th</sup> largest globally. Ugandan coffee has a distinct aroma and wine-like acidity. But it is not as popular as Kenyan or Ethiopian coffee. Most of the coffee produced is exported which contributes significantly to the economy. It dominates the robusta market (with 47 percent share) among African countries. Compared to Guinea, Uganda's production and export of robusta has grown significantly since 2015.

Table 10: Production and Export of Green Coffee: Uganda (USDA, 2014 – 2019)

		2014/2015	2015/2016	2016/2017	2017/2018	2018/2019
Commodity	Attribute	Unit ('000 60kg Bags)				
Coffee, Green	Arabica	750	750	1200	750	800
	Robusta	2800	2900	4000	3600	4000
	Total Production	3550	3650	5200	4350	4800
	Total Exports	3400	3500	4600	4600	4600

Source: USDA Foreign Agriculture Service, "Production, supply and distribution", online: <https://apps.fas.usda.gov/psdonline/app/index.html#/app/advQuery>, viewed in May 2020.

### 2.7.1 Comparative and competitive advantage of Guinea's competitors

The comparative and competitive advantage of Guinea and its sector competitors are viewed as either high, low or medium, based on the following measures:

- *Economic significance*: Average share of coffee as a percentage of GDP and Exports
- *Production and Export Capacity*: Based on volumes produced, productivity, productive area, average farm size. Volume of coffee exported robusta and/or arabica, value of coffee exported to the EU
- *Certification*: Rainforest Alliance / UTZ, Fairtrade and organic certification levels.
- *Coffee Value*: estimated coffee prices (avg. minimum-fixed/regulated or avg. auction price NOT farmgate price paid to farmers)
- *Ease of doing business*: Based on current ranking of EODB
- *Youth Inclusion*: involvement of youth in coffee, youth unemployment
- *Gender equality*: gender gap ranking, especially in labour force participation, wage equality and earned income and access to assets.

The table 11 below is used to illustrate how Guinea compares with the other African countries that produce and export robusta and/or arabica coffee.

Table 11: Summary of comparison of Guinea to other African coffee producing countries

Topics	Guinea	Uganda	Tanzania	Cote d'Ivoire	Cameroon	Kenya	Ethiopia
Economic significance	Low	Medium	Low	Low	Low	Low	Medium
Ease of doing business	Low	Low	Low	Low	Low	Medium	Low
Production	Low	High	Medium	Medium	Low	Low	High
Exports	Low	High	Medium	Medium	Low	Low	High
Certification	Low	High	High	Medium	Medium	High	High
Prices / Coffee Value	Medium	Medium	Medium	Low	Low	High	High
Gender equality	Medium	Low	Low	Low	Low	Low	Low
Youth involvement	Low	Low	Low	Low	Low	Low	Low

#### **Economic Significance:**

Coffee is of added value to the economies of these coffee producing countries. Ethiopia and Uganda stand out with significant contributions of coffee to both their national GDP and export earnings.

Table 12: Comparison based on share of coffee in GDP and export earnings

	Share of coffee in GDP		Share of coffee in Exports	
	1995	2015	1995	2015
Cote d'Ivoire	2,6	0,3	9,2	1,0
Guinea	0,2	0,3	0,8	0,8
Cameroon	1,4	0,4	0,9	2,0

Ethiopia	1,1	1,2	44,0	18,9
Tanzania	1,9	0,3	24,2	3,0
Uganda	3,3	1.5	92,1	17,9

Source: ICO (2017) "Value addition in the African coffee sector", online: <http://www.ico.org/documents/cy2016-17/icc-120-7e-african-coffee-sector.pdf>, viewed in May 2020.

**Ease of Doing Business:** The World Bank's Doing Business records the time and cost associated with the logistical process of exporting and importing goods from and to a country. It measures the time and cost (excluding tariffs) associated with three sets of procedures: documentary compliance, border compliance and domestic transport - during the shipment of goods. According to the 2020 rankings, Guinea has the third lowest ranking (i.e. 167/190), meaning that it is quite challenging to do business in Guinea compared to other countries. It is also notable in table 13, that Guinea shows relatively high cost to export and longer time for documentary compliance procedure in export.

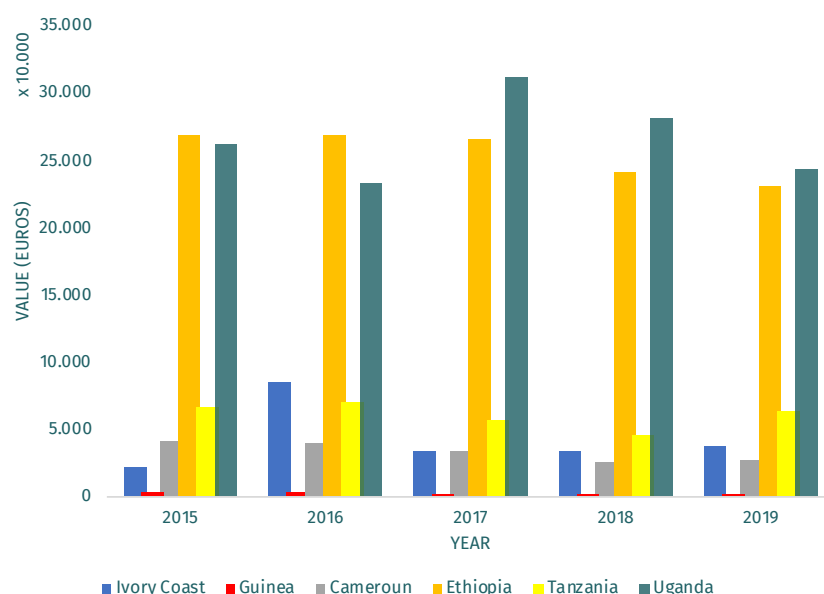
Table 13: Comparison based on Ease of doing business

	Guinea	Uganda	Tanzania	Cote d'Ivoire	Cameroon	Kenya	Ethiopia
Country Rank	167	121	182	163	186	117	156
• <i>Border Compliance</i>							
Time to Export (hours)	72	59	96	239	202	16	51
Cost to Export (USD)	778	209	1175	423	983	143	172
• <i>Documentary Compliance</i>							
Time to Export (hours)	139	24	96	84	66	19	76
Cost to Export (USD)	128	102	275	136	306	191	175

Source: Data compiled based on results from World Bank's Doing Business 2020 Rankings.

**Production and Exports:** Compared to Guinea the other countries have higher amounts of production and export of robusta (and arabica). For the coffee market, volumes matter. So far, Guinea shows significant decline in production and it is affecting its exports, especially to the EU. Figure 10 compares the value of export earnings during 2015 – 2019 from coffee sales to the EU. Guinea is significantly behind.

Figure 10: Comparison based on size of Coffee Export to the EU



Source: USDA Foreign Agriculture Service, "Production, supply and distribution", online: <https://apps.fas.usda.gov/psdonline/app/index.html#/app/advQuery>, viewed in May 2020.

**Quality:** Ethiopian, Ugandan and Kenyan coffee are more expensive but have the reputation of having higher quality coffee. Uganda and Cote d'Ivoire robusta are likely considered by the market to be of higher quality than Guinea robusta. With respect to coffee origins, although Guinea's Macenta and Fouta Djallon coffee have the potential, the specialty market would most likely prefer to source robusta or arabica from Guinea's competitors, given their familiarity with these origins and their quality and taste profile. Although Guinea has a long history with coffee, the sector is still immature (compared to its peers) and its robusta coffee is very much unknown in the EU specialty coffee market. Almost all the EU buyers interviewed for this research knew very little or nothing at all about Guinea coffee. EU specialty buyers tend to stick to recognized sources and relationships that have been built over the years. For example, an EU company clearly indicated during the interview that they will not be *"buying coffee from Guinea nor do we have any plans to do so within the short-term. The overall demand for coffee from Guinea amongst our buyers is almost non-existent"* Most of the other countries have proven track record of their Robusta being able to meet SCAA and SCAE's definition of specialty coffee, the extent of this for Guinea is still unclear. Nevertheless, Guinea coffee has potential, as there is still a growing interest among EU consumers for (new) African origins and sustainable sources. One of the EU companies interviewed, noted that if Guinea robusta coffee is of high quality, they would be interested in buying; mainly because, they welcome the challenge of bringing good quality Robusta to EU consumers in a transparent chain. The company maintained that they would be willing to work together with CBI, but only if the quality from Guinea is good. Other EU companies expressed doubts but would be only willing to consider (mainly arabica) coffee from Guinea once there is an established good reputation (in terms of quality and reliability of supply).

**Certification:** While Uganda and Cote d'Ivoire have higher amounts of certified robusta for export, there is little information regarding the extent of certified robusta in Guinea. Only one fair trade certified robusta coffee was found during this research (i.e. café Ziama-macenta). This puts Guinea at a disadvantage. Tanzania for example is estimated to have between 7 and 17 percent of its coffee exports certified under a sustainability standard.<sup>18</sup> The country is considered to be the sixth largest in terms of number of organic-certified farmers in the world and the third largest in Africa.

**Youth inclusion:** In some of these countries, the coffee sector is ageing as the average age of coffee farmers increases. For example, in Tanzania, the average age is estimated to be around 60 years. Youth inclusion is poor across the board as the sector becomes increasingly unattractive to the young population. Only a few of these countries are actively trying to encourage youth to engage in agriculture. Guinea has a large youth population, as between 60-65 percent of its population are under the age of 25 (as of July 2019 UN estimate)<sup>19</sup> – this could potentially be a good opportunity for youth inclusion in the country's coffee sector. However, the World Bank's Risk and Resilience Assessment report stressed that *the lack of inclusion of urban youth in the labour market, is one of the drivers of fragility in the country* (the large urban unemployed youth population in Guinea is known to play a key role in the country's political protests). Meanwhile, rural youth continue to migrate to Conakry and other urban areas in search of better income, thereby adding stress to an already overwhelmed infrastructure and labour market.<sup>20</sup>

**Gender Inequality:** Specific data on gender inequality in Guinea's coffee sector is non-existent, nevertheless, the results from the Global Gender Gap Index 2020 provides a useful lens to better understand the nature of gender inequality in the country as a whole (which largely also applies to the coffee sector). Guinea is ranked at 125 out of 153 countries in the index. The ranking indicates a decline in Guinea's ability to close its gender gap, as it fell by 9 places compared to the last ranking in 2018. Guinea is among the 8 countries that have yet to close more than 20 percent of their overall gender gaps. One of its major challenges is the literacy and basic skills gender gap which shows that Guinea's performance is stagnant at about 40 percent unclosed gap. Beyond elementary school, the gender gap is significant in Guinea at above 50 percent.

These results indicate that it is crucial for programs or interventions in Guinea's coffee sector to prioritize literacy, skill and capacity building of women coffee producers and exporters. It is positive to note that globally, Guinea has almost closed its gap regarding women participation and inclusion in the labour force; meaning that there is as much women (if not more than men) in the country's coffee sector. Similarly, Guinea has closed around 75 percent of its income and wage gender gap. On these two points, Guinea has a comparative advantage over its peer coffee producing countries. Guinea can utilize this advantage to support women in coffee and encourage

more women into the sector at all levels of the coffee value chain (production, processing, and export – both regional and international).

Table 14: Comparison based on Gender inequality

Rank	Guinea	Uganda	Tanzania	Cote d'Ivoire	Cameroon	Kenya	Ethiopia
Overall Gender Gap	125 <sup>th</sup>	65 <sup>th</sup>	68 <sup>th</sup>	142 <sup>nd</sup>	96 <sup>th</sup>	109 <sup>th</sup>	82 <sup>nd</sup>
Participation & Inclusion	1 <sup>st</sup>	34 <sup>th</sup>	27 <sup>th</sup>	98 <sup>th</sup>	51 <sup>st</sup>	26 <sup>th</sup>	52 <sup>nd</sup>
Wage Equality	14 <sup>th</sup>	23 <sup>rd</sup>	65 <sup>th</sup>	57 <sup>th</sup>	81 <sup>st</sup>	61 <sup>th</sup>	132 <sup>nd</sup>
Earned Income	43 <sup>rd</sup>	109 <sup>th</sup>	18 <sup>th</sup>	104 <sup>th</sup>	122 <sup>nd</sup>	38 <sup>th</sup>	93 <sup>rd</sup>
Literacy	143 <sup>rd</sup>	122 <sup>nd</sup>	118 <sup>th</sup>	133 <sup>rd</sup>	120 <sup>th</sup>	106 <sup>th</sup>	135 <sup>th</sup>

Source: Data compiled based on results from Global Gender Gap Index 2020

Although women make a large proportion of the coffee sector in many of these African countries, there is still significant gender gap especially when it comes to access to land and credit. For example, despite the fact that there are more women involved in agriculture in Cameroon, it is estimated that 90 percent of landowners in Cameroon are men compared with 10 percent being women. Results from the Global Gender Gap 2020 scoring in table 14 shows that Uganda, Cote d'Ivoire and Cameroon are among the worst when it comes to providing women access to land, right to land ownership, right to obtain access to credit and to hold a bank account. Guinea scores much better compared to these three countries, indicating that although inequality still occurs on these topics, the situation is less challenging in Guinea than other African countries. This is a positive development considering the fact that access to land (or right to land ownership) and access to credit are two major bottlenecks that women usually face in the coffee sector in Africa.

Table 15: Comparison based on Gender inequality

Score from 0 to 1 (worst)	Guinea	Uganda	Tanzania	Cote d'Ivoire	Cameroon	Kenya	Ethiopia
Access to Land use, control and ownership	0.25	1	0.25	1	1	0.50	0.25
Right to hold Bank account and obtain Access to Credit	0.25	0.75	0.25	0.25	0.25	0.25	0.25

Source: Data compiled based on results from Global Gender Gap Index 2020

**Coffee value:** Coffee prices in table 16 below show that Guinean coffee is not significantly behind in terms of price value per kilo. The Guinean government is currently working on a campaign to fix the minimum coffee price to €0.96 (USD 1.10) per kilo.<sup>21</sup> It is estimated that in 2020, the price range for Guinea coffee would be around €0.99 (USD 1.13) and €1.41 (USD 1.61) per kg.<sup>22</sup> The Guinean National Institute of Statistics (INS) claims that as at 2019, the highest export market price paid for 1kg of Guinean coffee was around €2.5 (USD 2.88).<sup>23</sup> If these numbers are accurate, then compared to average world market price (i.e. combined EU and US prices average) for 1kg of robusta coffee which is around €1.28 (July 2020)<sup>24</sup> and €1.44 (July 2019)<sup>25</sup>, it means that Guinean coffee comes at a decent price considering that it is relatively unknown and the demand is still quite low. The figures in table 16 are not farmgate prices (which are difficult to find) but are either estimated (fixed/regulated) minimum prices or estimated average auction prices. It is important to also emphasize that the figures in the table should not be fully relied on given that there is no central credible source with the coffee prices for all these countries. Nevertheless, it provides some perspective. It is worth mentioning that the Ethiopia has recently announced a directive to set daily minimum prices of coffee (i.e. the “Export Coffee Contract Administration”). Sector experts note that this is likely to rattle the industry as a whole and lead to price increases in other countries.

Table 16: Comparison based on Coffee prices

Rank	Guinea	Uganda	Tanzania	Cote d'Ivoire	Cameroon	Kenya	Ethiopia
Coffee prices €/Kg	0.96 <sup>26</sup> - 2.5 <sup>27</sup>	1.44 <sup>28</sup>	1.78 (A) 1.34 (R) <sup>29</sup>	1.06 <sup>30</sup>	1.28 <sup>31</sup>	2.67 <sup>32</sup> - 3.63 <sup>33</sup>	2.02 <sup>34</sup>

Source: Data compiled based on multiple websites as indicated in table.

## CHAPTER 3. EU IMPORT AND MARKET DEMAND FOR GUINEAN COFFEE

### 3.1 EU import of Guinea Coffee

There is a significant decline in the EU import quantity and value of robusta coffee from Guinea, over the past 5 years. Experts point to the fact that the Guinea robusta is largely unknown and efforts by the country to boost the sector have been ineffective so far.

Table 17: EU Coffee imports from Guinea in Quantity and Value (2015 – 2019)

	2015	2016	2017	2018	2019
	Coffee (excluding roasted and decaffeinated)				
Value (in €)	2.525.233	2.566.047	1.584.253	854.321	821.101
Quantity (in 100 kg)	13.002	17.453	7.668	5.328	6.822

Source: Table developed based on Eurostat, “International trade in goods – detailed data”, viewed in May 2020.

Most of the EU stakeholders interviewed could not offer any substantive impression or comparison between Guinea and other important source countries (in terms of quality, price, consistency and types of supplies), because they mainly do not know enough or do not have any experience with Guinea coffee. However, a few noted that coffee from Guinea and some West African source countries are generally not of high quality and that the supply chain is not consistent compared to their peers in East Africa. They also noted that poor infrastructure and growing political unrest in the country exacerbate the current situation in the sector. Some of the interviewees indicated that they have had good experience with Guinea’s neighbours such as Cote d’Ivoire and Cameroon. Only a handful expressed willingness to source Guinean coffee (either robusta or arabica) if the situation improves. One company explicitly indicated during our interview that they would be willing to collaborate with CBI and value chain assurance specialists (such as SureChain) to bring quality Guinea coffee to the EU market.

Some experts indicate that to turn the situation around, Guinea needs to realize the following:

- Increase in robusta and arabica production and yield
- Consistency in producing fine quality robusta and arabica
- An enabling regulatory environment (including improvement in infrastructure)
- Increase their potential for producing high quality robusta and specialty /niche arabica
- Third party support on how to promote and market Guinean arabica
- Third party investment in capacity development of Guinea coffee exporters on financial literacy and running a business

### 3.2 Demand on the European market (include imports, consumption etc.)

In 2019, global purchases of coffee were estimated at USD 30 billion, a 5.1 percent decrease in value from 2018. About 59 percent of these purchases came from EU countries.<sup>35</sup> Coffee consumption and demand from Europe increased by 1.3 percent from 2016/17 to 2019/20 coffee season.<sup>36</sup> However, the demand for Guinea coffee on the European market is not high. This is primarily due to the fact that Guinean coffee is not widely known. Several coffee buyers interviewed noted that they had never heard of Guinean coffee and that most of their coffee (Robusta) imports come from neighbouring West African countries such as Cameroon and Cote d’Ivoire.

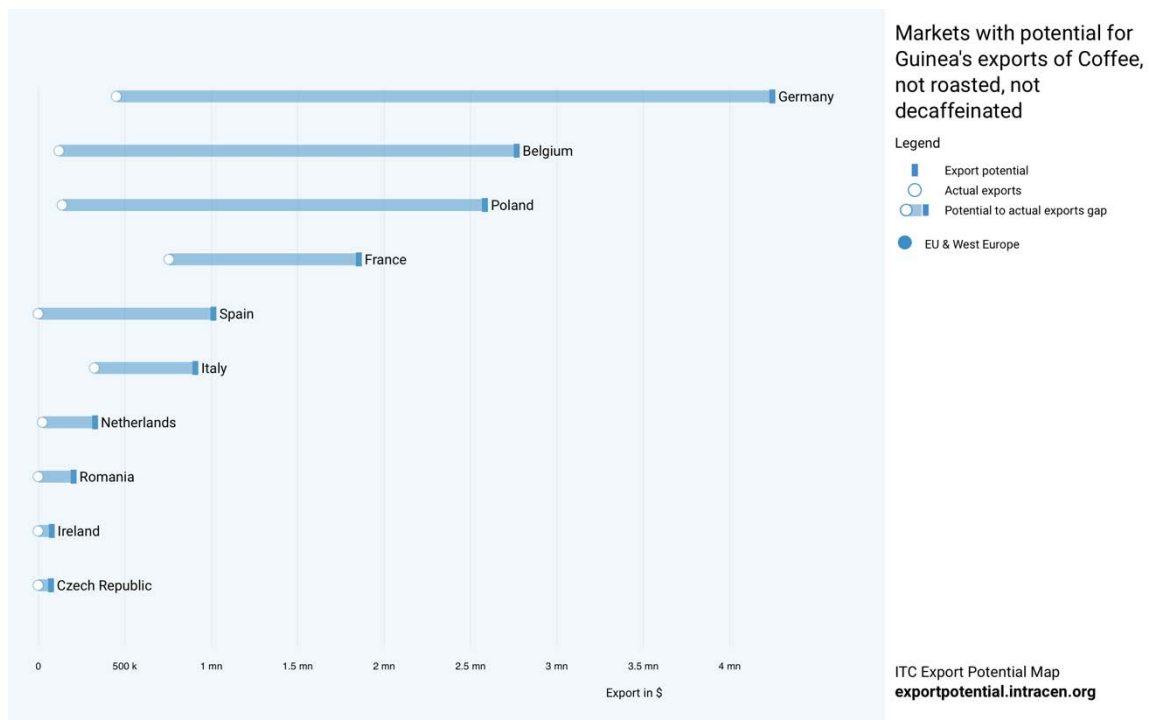
The few companies that had some experience with Guinea coffee noted that their customers are not demanding Guinea coffee unlike other East African coffees. One of the companies interviewed noted that *“the single important thing is how to convince our customers to change their habits from existing West African Robusta to Guinea”*. Another company shared their experience with Guinean coffee, noting that they had bought some robusta coffee from Guinea and that the quality was good; but that for arabica, they had a single experience and the cup didn’t meet their customers’ requirements (particularly on taste).

### 3.2.1 Untapped Export Potential

ITC Export potential Map shows that the products with greatest export potential from Guinea to EU & West Europe are Cocoa beans & products, Fruits, and Coffee. Overall, the untapped export potential of Guinea coffee to both the EU and the world is significant.

- Total Export potential of Guinea coffee (i.e. HS codes 090111 - coffee, not roasted, not decaffeinated) to the world amounts to about USD 31.6 million, while untapped potential is about 23.6 million (about 75 percent).
- The total untapped export potential of Guinea coffee to the EU is equally significantly high – about 87 percent (total export potential of Guinea coffee to EU is USD 13.8 million and untapped export potential is about USD 12 million).

Figure 11: Comparison based on size of Coffee Export to the EU



The figure 11 above shows the top 10 EU most promising markets that offer the most opportunities for Guinea coffee export. The untapped export potential for most of these markets are still significant, which means that the potential for expansion for Guinea coffee into these countries is high. Based on this data, Germany, Belgium and Poland are the top three European markets for Guinea coffee that offer most opportunities. According to ITC, France, Germany, Italy, Poland and Belgium are the leading EU markets based on value of their total actual exports. Based on ITC market data, “090111 Coffee excluding roasted and decaffeinated” is the product segment which constitutes the majority of the Guinea’s coffee export. Currently, conventional green coffee from Guinea is mainly sold for use in blends (and not as single origin coffee) as its quality is relatively unknown to the market. Although still at infancy stages, the specialty, certified niche market segment will likely offer significant opportunities for Guinea coffee on the medium to long-term, hopefully triggered by the success of Café Ziama de Macenta (that obtained a GI label and is now currently Fair Trade Certified).<sup>37</sup>

### 3.2.2 Some risks of market decline (short and long term).

Currently, the import trend of Guinea coffee to EU is in decline (see data in figure 6). As noted earlier, this is not expected to improve on the short term, especially given the potential market disruptions caused by the COVID-19 pandemic. The effect of COVID-19 on EU coffee market is well documented by CBI, ICO and others. There is general concern that the pandemic could cause production and export shortages from the supply-side and that international coffee price dynamics

could be affected. There is a risk that this could impact Guinea coffee sector significantly. In addition, the country is currently in a political quagmire. Although there seems to be some commitment from the government to continue support for the coffee industry, political instability often hurts business confidence and poses increased safety and security concerns. For example, an increase in violence may have an impact on the international coffee buying community's willingness to visit Guinea, and that could affect green coffee bean sales.

### 3.3 Price development

Over the last five years, the prices of Guinea coffee appear to have slightly declined. According to the Guinean National Institute of Statistics (INS), in 2015, the average of the highest export market price paid for 1kg of Guinean coffee was USD 3.14, while as at 2019 the price fell by about 8 percent to USD 2.88. Table 18 below shows the evolution (per month) since 2015. It is important to mention that we could not determine if the price indicated by the INS is the amount directly paid to coffee farmers. Another source indicated that the average export market price for 1 kg of Guinea coffee in Conakry, packed and ready for shipment was around USD 2.38 in 2018.<sup>38</sup> See also the price indications for Guinea coffee (including comparison with world robusta coffee price) mentioned under *Coffee value* in section Comparative and competitive advantage of Guinea's competitors 2.7.1.

Table 18: Price development of Guinea Coffee 2015 - 2019

Price of Coffee (USD)	2015	2016	2017	2018	2019
January	2916	3200	3720	3060	2832
February	2962	3260	3670	3004	2832
March	2878	3470	3530	2977	2731
April	2868	3400	3430	2962	2670
May	3096	3420	3310	2990	2658
June	3240	3650	3160	2955	2860
July	3326	3790	3300	2879	2987
August	3154	3690	3300	2760	2783
September	3279	3890	3230	2672	2842
October	3197	3894	3100	3028	2800
November	3361	4060	3110	3023	3108
December	3404	3570	3030	2802	3455
USD/tonne	3140,08	3607,83	3324,17	2926,00	2879,83
USD/ kg	3,14	3,61	3,32	2,93	2,88

Source: Table developed based on data from Institut National de la Statistique, [www.stat-guinee.org](http://www.stat-guinee.org)

### 3.4 Main European players on the market

Leading globally operating coffee importers are Neumann Kaffee Group (Germany), ECOM Agroindustrial Trading (Switzerland), Olam (Schluter Olam, UK), Sucafina (Switzerland) and Volcafé France (ED&F MAN). All five of them are active in the EU specialty/ niche coffee market.<sup>5</sup> Table 19 lists the main "niche buyers" of specialty coffee in Europe and the (African) origins of their coffee.

- Neumann Kaffee Gruppe (NKG) is the world's leading coffee trader, controlling around 10 percent of world coffee trade. As a vertically integrated group, it also operates three coffee estates with a total of about 7,500 hectares. It is involved in the import and trade of industrial coffee volumes, as well as specialty and instant coffees. NKG is very active in the African coffee scene. Maison P. Jobin et Cie, is currently a part of the Neumann Kaffee Gruppe. As part of the commercial strategy for obtaining the GI label, Café Zياما-Macenta entered into contract to export 40 tons of Guinea coffee to Maison P. Jobin. The company confirmed during our interviews that it no longer buys coffee from Guinea because its customers are not requesting Guinea coffee.
- Olam International, the third largest coffee trader in the world, is involved in all stages of the coffee supply chain, including plantations (Brazil, Tanzania, Zambia and Laos), procurement, wet and dry milling, classification, transportation and risk management, to marketing processed coffees. Olam is present in 15 countries in West Africa including Guinea.<sup>39</sup> Olam

<sup>5</sup> Four of these companies were interviewed (i.e. NKG, Schluter Olam, ECOM, & 32 Cup -a subsidiary of Sucafina)



sources coffee from long established specialty origins like Kenya and Guatemala, to emerging specialty regions. Schluter Olam (Olam Specialty Coffee Europe Ltd., based in the UK) sources from several African countries but not yet in Guinea (see table 18).

- ECOM Agroindustrial is a Switzerland-based coffee trader. It supplies commercial as well as specialty roasters. In 2013, ECOM acquired a 50 percent stake in specialty coffee trader Mercanta (UK). While ECOM is reportedly not involved in day-to-day operations, it has helped to increase Mercanta’s reach in sourcing beans. ECOM has West African subsidiaries that trade in coffee (e.g. Fakoco Cameroon). It is unclear the amount of Guinean coffee that ECOM buys.
- Sucafina accounts for around 5 percent of global green coffee trade. Its subsidiary 32cup (Belgium) is engaged in the specialty coffee business.
- Volcafé is the coffee trading arm of commodity house ED&F Man. In Europe, specialty coffees are marketed under the brands Volcafe Select and Gollücke & Rothfos. In some African countries such as Tanzania, Volcafé’s subsidiary Taylor Winch is one of the leading coffee buyers and exporters.

Table 19: EU Specialty Coffee Buyers

EU SPECIALTY COFFEE COMPANIES	SOURCE COUNTRIES (AFRICA)																	
	Burundi	Cameroon	Cote d'Ivoire	DRC	Ethiopia	Ghana	Guinea	Jamaica	Kenya	Madagascar	Malawi	Mauritius	Rwanda	Tanzania	Togo	Uganda	Zambia	Zimbabwe
BELCO, France <sup>40</sup>	•	•			•			•	•									
Kilimanjaro Specialty, Spain <sup>41</sup>	•				•								•					
Mercanta Coffee Hunters, UK <sup>42</sup>				•	•				•				•	•		•		
Schluter, UK (Olam) <sup>43</sup>	•			•	•				•		•		•	•				
Cafe Imports, UK <sup>44</sup>	•			•	•			•	•		•		•	•				
DRWakefield <sup>45</sup>					•				•		•		•	•				
Inter American Coffee, EU <sup>46</sup>	•			•	•			•	•		•		•	•				
Falcon Specialty Coffee, UK <sup>47</sup>	•			•	•				•				•			•		
Trabocca, NL <sup>48</sup>					•				•									
Greencof, NL <sup>49</sup>	•			•	•				•				•	•			•	•
This Side Up, NL <sup>50</sup>				•	•								•	•		•		
The Coffee Quest, NL <sup>51</sup>		•			•													
Douqué, NL <sup>52</sup>					•				•									
Nordic Approach, Norway <sup>53</sup>	•				•				•				•	•		•		
Collaborative Coff., Norway <sup>54</sup>	•				•				•									
32 Cup, Belgium <sup>55</sup>	•				•				•		•		•					
Efico, Belgium <sup>56</sup>	•	•	•	•	•	•			•	•			•		•	•		
List and Biesler, Germany <sup>57</sup>	•			•	•				•				•	•		•		
Blaser Trading, Switzerland <sup>58</sup>					•			•	•					•				
Garbin Coffee Trade, Italy <sup>59</sup>	•	•	•	•	•				•	•			•	•	•	•		
Colibri Kofe, Russia <sup>60</sup>					•													
Macenta coffee, Germany <sup>61</sup>							•											
NKG, Germany <sup>62</sup>					•				•					•		•		
Ecom Trading, Switzerland <sup>63</sup>			•		•				•					•		•		
Sucafina, Switzerland <sup>64</sup>	•		•		•								•	•		•		
Volcafe France <sup>65</sup> (ED&F MAN)				•	•				•			•	•	•		•		

Source: Created by SureChain based on data obtained on websites of the companies, viewed in May 2020.

## **CHAPTER 4. KEY CHALLENGES AND OPPORTUNITIES IN GUINEA COFFEE SECTOR**

This chapter summarizes the main challenges, threats and opportunities in Guinea coffee sector.

### **4.1 Key Challenges**

#### **4.1.1 Low production and export volumes**

As presented in table 2, table 3 and figure 3, the production, yield and export volumes of Guinea coffee is still very low and even showing a declining trend. A number of reasons could be responsible for this, including farmers not having sufficient disease-resistant seeds, farmers dependence on old and low-yielding trees, poor GAP practices and inadequate extension support, lack of investment for good coffee washing stations and drying tables, etc. Apart from quality, EU buyers would be interested in consistency in volume/supply of coffee. This is a fundamental challenge that Guinea must overcome in order to be competitive in the EU coffee market.

#### **4.1.2 Poor enabling regulatory environment**

Guinea coffee sector suffers from poor enabling regulatory environment. Although the government has recently shown some interest in revamping the industry as outlined in section 2.3.1, it has been largely unhelpful during the last decades. In fact, in 2017, the budget allocated to the Ministry of Agriculture was slashed by about 33 percent compared to the previous year.<sup>66</sup> Such actions would definitely affect the coffee industry in Guinea. Compared to other countries where incentives are provided to (coffee) farmers and the government is revising coffee regulations and making needed reforms in the coffee sector, the Guinean government lags behind. It remains to be seen if the PASANDAD 2016-2020 programme will yield positive results for the country's coffee sector.

#### **4.1.3 Low Private sector Initiatives**

Similar to the poor enabling regulatory environment, the country lacks effective private sector initiatives in the coffee sector. For example, there was hardly any information on (intended) initiatives by banks and other financial institutions to target the development of the coffee sector in Guinea. Contrast that with Tanzania where banks like National Microfinance Bank (NMB) provides finance for farm inputs, seedlings, expansion and capacity building to coffee farmers. It also provides loans to e.g. exporters and had set aside about € 24 million for the coffee sector in 2018 to service loans for warehouse receipt, provision of inputs, expansion investments and infrastructure at farmgate level. It is important to note that the International Islamic Trade Finance Corporation (ITFC) a member of the Islamic Development Bank has been supporting Guinea in improving other sectors such as Mango and Cashews, through the bank's Reverse Linkage Initiative.<sup>67</sup>

#### **4.1.4 Bottlenecks in infrastructure and logistics for exports**

Although some roads in Guinea are being constructed or rehabilitated, there are still a lot of roads that become impassable during rainy seasons, effectively creating bottlenecks in transportation. There is limited available storage capacity in the country and the existing structures usually need rehabilitation and repairs. In some other local areas, there are no storage facilities or warehouses and so, exporters/traders often find an old cinema theatre handy to serve as their temporary storage. Port delays and congestion as well as inefficient customs procedures are quite common. Research indicates that it takes more than half day between arrival and berthing at the Conakry Terminal.

#### **4.1.5 Poor certification**

Most Guinean coffee are currently not certified. The main obstacles faced by coffee producers are the high cost of certification and the lack of information, according to one of the actors active in the Guinean coffee sector. For example, Ecocert certifies organic producers in Guinea. Certification costs amount to 30,000 French francs, including auditor expenses.

While on the one hand, European (specialty) buyers value quality over certification. They argue that certification is often expensive and burdensome on coffee farmers. They stress that it does not necessarily guarantee good quality and reliability of supply (which are their main needs) or an increase in incomes for farmers, and as such, they struggle to see its overall value. They however see the value in utilizing technology to provide greater transparency and traceability in the coffee value chain and to show proof of impact.

On the other hand, EU NGOs still see the need for certification. They maintain that independently verified certification schemes can be a good starting point for companies to address CSR-related issues in the coffee value chain. There are however examples of coffee farmers and cooperatives that could be supported to obtain Fairtrade, Organic, Rainforest Alliance/UTZ or other certifications. Already Café-Ziama Macenta has obtained a Fairtrade certification for its robusta coffee, indicating that this is still feasible for Guinean coffee farmers.

#### **4.1.6 Low capacity of grassroots actors**

According to sector experts, coffee associations in Guinea have weak organizational and professional capacity (especially to effectively mobilize and represent women and youth who are considered key actors in the coffee sector and in agriculture as a whole). Most of the coffee cooperatives, associations and business support organisations lack financial resources to implement capacity development and coffee quality improvement programs and as such depend on foreign donors or grants. Due to lack of financial resources, most smallholder farmers do not participate much farther in the value chain, as they exit at the cherry stage, potentially losing any additional gains from their sales further in the chain.

#### **4.1.7 Current Political instability**

The current political climate is unstable and has heightened insecurity in the country. If there is an escalation of violence, this may have an impact on the international coffee buying community's willingness to visit Guinea, and that could affect green coffee bean sales.

#### **4.1.8 Impact of COVID-19**

Like other producing African countries, Guinea is severely impacted by the COVID-19 pandemic. Large public gatherings have been banned, wearing a face mask is mandatory in public places, the international airport has been closed to non-essential flights, public areas are required to have hand sanitizing equipment and Guinean embassies and consulates have suspended visa issuance to travellers from countries with more than 30 confirmed cases. On March 26, Guinea declared a state of emergency and tightened lockdown, requiring all travellers to provide proof of a COVID-19 test result and upon arrival, to undergo another test and a mandatory 14-day quarantine. In addition, foreign nationals must undergo a 14-day quarantine prior to their travel. On June 15, Guinea extended the state of emergency for 30 days and announced further measures to ease lockdown restrictions. Also, important to note that there are several reports by Human Rights Watch of government harassment, intimidation and gross violations of human rights and atmosphere of insecurity linked to government implementation of measures of the Covid-19 pandemic.<sup>68</sup>

Currently it is the beginning of the coffee picking season, although travel between Conakry and other cities is restricted, most picking activities are done at location by small scale farmers with help from the family household. Lack of labour during picking can become challenging when family members become sick. Since masks are needed in public spaces, picking activities could continue when using masks and disinfection products. However, it is not clear if the government is giving out masks to everyone or if people need to arrange it themselves. It can become a risk when farmers are not able to acquire proper masks and workers get infected during picking.

Some coffee experts noted that they have experienced delays in deliveries because of the active lockdown in coffee producing countries. In some countries, stocks are not allowed to leave the country. The restrictions cause delays in deliveries as only few workers are able to work in processing facilities. The normal level of coffee quality also cannot be guaranteed as farmers are most likely not able to meet the necessary standards for speciality coffee given the circumstances. As a result, producers sell their coffee locally at (cheap) volume price, thereby impacting their incomes. Guinea is mainly exporting "ungraded" coffee to Senegal, Algeria, Morocco, etc. If regional export is possible, this might limit the impact of COVID-19 for Guinea coffee farmers.

According to CBI, in consuming markets, importers are stockpiling and accelerating their orders in order to avoid any potential shortages due to chain disruptions in coffee producing countries, caused by COVID-19. CBI also notes that the effects of COVID-19 on market prices is still uncertain but would be affected by the developments in major coffee producing countries like Brazil.<sup>69</sup>

Guinea is also implementing some fiscal measures to support the private sector. The government is specifically contemplating support measures to some agricultural commodity chains such as cashew, pineapple and potatoes. However, it is unclear if there will be specific support for the coffee sector.

#### 4.1.9 CSR risks

Three main CSR risks identified are: child labour, adverse working conditions including low worker wages and soil degradation. In addition, based on their experience in Guinea and other west African countries, sector experts emphasized the occurrence of corruption and lack of chain transparency in the coffee sector.

*Child labour:* According to the US department of labour, DOL (2017), children in Guinea's agricultural sector still engage in child labour and the enforcement agencies lack adequate resources to protect children and enforce the existing child labour laws (e.g. the Guinean Labour Law). DOL report indicates that the Guinean Ministry of Labour lacks the trained staff, equipment, transportation, and funding to conduct child labour inspections and hold legal proceedings. The number of labour inspectors in Guinea is currently unknown to service the 5.5 million workers in the country (only 53 labour inspectors exist in Conakry), but it is expected that the national number would very likely be insufficient, given that based on ILO requirements, the country would need 1 inspector per 40,000 workers.<sup>70</sup>

More than 1 million children aged 5-14 are engaged in child labour in the agricultural sector in Guinea. Children are also trafficked domestically and abroad for forced labour and commercial sexual exploitation. Although there is limited data on the extent of child labour in Guinea's coffee value chain, according to DOL (2017), coffee is seen as one of the four major agricultural sectors in which child labour is prominent. Sector experts corroborate that child labour is a common practice on most coffee plantations in Guinea. However, they note that Guinean farmers believe that the participation of children on coffee plantations is essential because they are members of the farmer's family. It is important to note that a number of institutions are working on social programs to address child labour in Guinea (e.g. Plan Guinea-Conakry Program, UNICEF, World Bank) and the Ministry for Social Action, Promotion of Women and Children (MASPFE) is leading a number of national efforts to combat child labour and trafficking in the Guinea (e.g. National Committee to Combat Trafficking in Persons and Similar Practices (CNLTPPA), and Committee for Monitoring, Protection, and Defense of the Rights of the Child (CGSDE)).<sup>71</sup> There are no specific efforts noted for addressing child labour in the coffee sector, but as this is a key CSR issue for EU consumers (and by extension EU buyers), the extent to which child labour occurs in the coffee sector and concrete solutions to combat this issue should be further explored in subsequent CBI assessments or programs in Guinea.

*Adverse working conditions (including low worker wages):* Guinean coffee producers suffer from difficult working conditions and economic vulnerability. Sector experts note that workers are exposed to a variety of health and safety risks, from soil preparation to the final storage of coffee bags, including pesticide poisoning, insect bites, and (skin) injuries due to high exposure to sunlight. These health and safety risks are heightened with the current COVID-19 pandemic. Workers are not usually provided with appropriate personal protective equipment (PPEs) at coffee plantations. The lack of modern technology in both producing and processing activities also makes the production very labour intensive. Regarding economic vulnerability, Guinea has a government-mandated minimum wage. According to the Guinean Labour Law, the guaranteed minimum inter-professional wage (SMIG) is fixed at 440,000 GNF per month (approximately €41). It applies to all workers. No worker in Guinea can be paid less than this mandatory minimum rate of pay and employers in Guinea who fail to pay the Minimum Wage may be subject to punishment by the government of Guinea.<sup>72</sup> However, the enforcement of this regulation is poor especially for temporary workers. The majority of workers in Guinean coffee plantations are temporary labourers. They most likely earn low wages and work longer hours (especially during peak periods) than mandated.

*Soil degradation:* According to sector experts, soil degradation is rapidly occurring in the main coffee producing areas in Guinea, with a growing risk of deforestation. It is estimated that for one cup of coffee, three square centimetres of forest is being destroyed. This is mainly caused by practicing monocultures, improper inputs and farming methods, using old machinery and a high

amount of pesticides. The lack of long-term investment in modern production methods is resulting in low coffee yields. It was also noted that several coffee plantations have been abandoned over the years and the forests are being destroyed for domestic use. Coffee production provides an excellent opportunity for agroforestry systems, since the coffee tree grows best in the shadow of other trees, and benefits from the rich soil it brings along. The Ziama Forest Reserve provides good opportunities for this way of production. There is no data available on possible organic production but based on actor input and general information on Western African production, this is probably limited.

*Corruption and lack of chain transparency:* Several interviewees who are familiar with doing business in west Africa noted that corruption is almost a way of life in its countries. Guinea is considered as one of the most corrupt countries in the world. In its 2018 Corruption Perception Index, Transparency International ranked Guinea at 138 out of 180 countries. Although in 2017, Guinea passed an anti-corruption law, the country has not prosecuted any case based on this law. World Bank's 2017 Worldwide Governance Indicators ranked Guinea in the 14<sup>th</sup> percentile, noting that *public funds have been diverted for private use or illegitimate public uses and land sales and business contracts generally lack transparency*. According to assessment by the US State Department, *the business and political culture, coupled with low salaries have historically combined to create and encourage corruption in Guinea. Requests for bribes is a common occurrence and as such, conducting business in Guinea without offering bribes is time consuming. In fact, business is said to be conducted through the payment of bribes rather than by the rule of law, as it is not uncommon for government officials to demand money for their personal use in exchange for performing their duties*. Corruption is said to be a major factor in the import and export of goods through Guinea customs/borders. The labelling or marking requirements for exports and imports are largely unclear to some exporters. While the government is taking some steps to ensure transparency in the mineral/extractives value chain, there are no known chain transparency initiatives in the agricultural/coffee sector

#### **4.2 Key Opportunities**

The key areas of opportunities identified are, the use of new technology to enhance coffee traceability and chain transparency of Guinea coffee; the prospect of engaging Guinea's incredibly large youth population in coffee cultivation and community development; the potential for improving and marketing the quality of Guinea's robusta and arabica coffee from new origins; and the potential to encourage Dutch and EU content (both from private sector actors and knowledge institutes) to develop the coffee sector in Guinea.

##### **4.2.1 Blockchain to enhance coffee chain traceability and transparency**

EU coffee companies are increasingly trying technologies (Blockchain, Artificial Intelligence AI, Smart contracts, etc) that can provide greater visibility in terms of traceability and chain transparency for their consumers who want to where their coffee comes from and the socio-economic and environmental circumstances under which they are produced. The application of Blockchain in coffee is growing (e.g. Token/ Bext360/ Moyee coffee/FairChain Foundation, Trabocca/Trace, etc.). EU coffee companies like Trabocca is working with TRACE (a blockchain platform developed by the NGO Fairfood, that supports supply chain mapping, product traceability and claim verification), to make its specialty coffee from the Guji region in Ethiopia become 100% traceable.<sup>73</sup> EU coffee companies interviewed noted that traceability and chain transparency is a challenge for agricultural products coming from west Africa. However, the advent of technological initiatives provides an opportunity to improve the situation. Moreover, the EFSA (European Food Safety Authority) has introduced 'farm to fork', which requires that all food must be traceable throughout the entire supply chain to assure a high level of food safety and animal & plant health within the EU. See CBI analysis on trends that offer opportunities for the EU coffee market: *"Blockchain is gaining ground as a tool to increase transparency and traceability"*.

Interestingly, research shows that GIs and Blockchain are a natural fit given that they both work towards the same goal of providing some form of visibility in (food) supply chains.<sup>74</sup> It is said that blockchain can also be used to increase confidence in GI food provenance, authenticity, and quality. Café Ziama Macenta in Guinea having obtained the GI recognition could be a good candidate for a pilot project that explores the potential of using Blockchain in maintaining and enforcing GI rights—particularly with the integration of smart contracts.<sup>75</sup> A project like this could potentially create awareness regarding Guinea coffee.

#### **4.2.2 Youth development and inclusion**

As mentioned in section 2.7.1, Guinea has a large youth population, and if properly trained and empowered could potentially be a good opportunity to enhance youth development and inclusion in the country's coffee sector. A good example worth mentioning is how Café du Foutah (arabica coffee in Fouta Djallon) was developed by a group of youths (led by Mamadou Bhoie Bah) who after their University study created a coffee cooperative and took over one of the several old abandoned coffee plantations in the region and consistently cultivated supposedly good quality arabica coffee for local markets. More initiatives like this from Guinean youths could be further incentivized in order to enable the production and export good quality arabica coffee.

#### **4.2.3 Improving and Marketing Quality Coffee from New Origins**

There is increasing demand for specialty coffee from new origins as EU consumers continue to demand sustainable products that positively impact the environment as well as the lives and livelihoods of people who produce them. Guinea coffee is relatively unknown (in terms of coffee quality and taste) and it is not currently recognized, marketed or sold as a single origin coffee. It is unclear how much Guinea coffee is certified, but it is fair to say that the quantity is very low. However, the GI recognition of Ziama Macenta coffee (which determined that its robusta variety is distinct in taste and characteristics which is clearly tied to a particular origin or territory) provides some opportunity for Guinea coffee (with improved quality) to be marketed and sold as a single origin coffee on the market. GI labelled coffee does not itself guarantee better market access unless quality can be assured through compliance with quality standards. Therefore, certification is essential to validate the product quality. As mentioned elsewhere in this report, Ziama Macenta coffee is also Fairtrade certified which provides such quality validation. Other coffee cooperatives could be supported to follow the same path towards gaining EU market access for their coffee.

#### **4.2.4 Supporting Dutch content to develop sustainable and good quality coffee**

A number of Dutch subsidies can support Dutch coffee companies and knowledge institutions to develop sustainable coffee projects with good quality (e.g. RVO instruments such as Drive, D2B, SDGP facility, DGGF). Such an opportunity could be used to support the transfer of knowledge/content in the core competences and areas of expertise of Dutch institutions regarding quality and sustainable coffee production (e.g. agroforestry), while developing the coffee sector in Guinea. For instance, agroforestry in coffee fields could contribute to coffee quality and the conservation of coffee plantations whose existence is under threat from climate change. Wageningen University can apply its experience in this area, to support Guinea coffee sector.

### 4.3 Key opportunities and challenges in meeting EU coffee market requirements

Table 20: Key opportunities and challenges in meeting EU coffee market requirements

	EU legal Requirements	Common Requirements from Mainstream Buyers			Additional requirements Niche Markets
	Food Safety, Contamination, Extraction Solvents, Packaging and Liability, Contamination, Extraction Solvents, Packaging and Liability	Quality, Specialty Coffee Grade, Q Graders (for Arabica), ISO 10470	Quality Management Systems (QMS): ICO Resolution 420, ISO 9001,	CSR: ILO Core Labour Standards, ISO 26000, Mainstream certification schemes (RA, 4C Association)	Organic certification, Fairtrade (FLO, FairForLife, Fair Trade Ecocert), Demeter, SMBC Bird Friendly and FGP-certifications
Opportunities	<ul style="list-style-type: none"> <li>Guinea already has specific procedures and guidelines to regulate food sampling, export and food-processing plant inspectors.</li> <li>The EU is active in supporting Guinean exporters who wish to comply with its export requirements.</li> <li>There are numerous institutions and service providers responsible for or involved in food safety in Guinea (e.g. INNM, SNCQN, CAFEX, ACRIMEX, ECOCERT).<sup>76</sup></li> </ul>	<ul style="list-style-type: none"> <li>Some EU buyers that have experience with Guinea robusta coffee offer positive reviews particularly on the quality of the beans.</li> <li>There is also expressed interest from at least one EU buyer willing to work with CBI in bringing quality robusta coffee from Guinea to EU consumers.</li> </ul>	The ICO adopts quality standards for exported coffee that must be met to be labelled as “S” coffee on the ICO Certificate of Origin: (a) for Arabica, not to have more than 86 defects per 300 g sample; and, for Robusta, not to have more than 150 defects per 300 g (Vietnam, Indonesia, or equivalent); (b) for both Arabica and Robusta, not to have a moisture content below 8% or in excess of 12.5%, measured using the ISO 6673 method.	Obtaining Fairtrade certification is possible (already Café-Ziama Macenta has obtained a Fairtrade certification for its robusta coffee). This implies that obtaining other mainstream certifications (such as Rainforest Alliance/UTZ or 4C Association) is potentially feasible for Guinean coffee farmers.	The GI recognition can be Guinea’s USP for marketing its robusta in EU markets, because it already helped to generate better price for coffee farmers and will potentially catalyse other significant developments for communities in Macenta and the environment (e.g. protection of threatened species in the Ziama forest).
Threats/ Constraints	<ul style="list-style-type: none"> <li>Food safety and foodborne diseases pose major health problems for the population of Guinea. According to a USAID commissioned study, of the food prepared and sold in Conakry, 81.2 percent is said to be contaminated.<sup>77</sup></li> <li>Some of regulatory texts relating to food safety in Guinea are said to be contradictory and many do not conform with international regulations, and their dissemination is limited.<sup>78</sup></li> <li>Despite the numerous institutions and service providers on food safety, there is currently no central coordinating organism for food safety control in Guinea.<sup>79</sup></li> </ul>	<ul style="list-style-type: none"> <li>Most of Guinea coffee are ungraded and as such most coffee farmers are already used to selling ungraded coffee and may not be enthusiastic to change to producing specialty grade coffee.</li> <li>Despite the SCA guideline for Specialty coffee,<sup>80</sup> there is currently no common understanding of what specialty coffee grade entails for Guinea, unlike in other producing countries with such knowledge.</li> </ul>	During the call with ICO, it was confirmed that Guinea is no longer listed as a registered member of ICO and the reasons were unclear (!), nevertheless, Guinea has signed its International Coffee Agreements of 2007 (on 02/07/2008). <sup>81</sup> Guinea is a member of the Inter-African Coffee Organisation.	<ul style="list-style-type: none"> <li>Although EU consumers are still interested in certified coffee, the cost of certification is becoming a cause for concern in the market, considering that it can become a burden to farmers.</li> <li>EU coffee buyers are also increasingly doubting if certification can lead to improved quality of beans. Their preference seems to be in technological tools that can assure chain transparency and show proof of impact in the chain.</li> </ul>	<ul style="list-style-type: none"> <li>With the proliferation of subject-specific certification schemes, the niche market may not fully recognize the value of the GI label compared to others listed above. Not all EU coffee companies interviewed showed interest in the value of a GI label. According to some, the price for GI Robusta is not competitive on the European (Robusta) market.</li> <li>The high costs involved to obtain some of these niche certification labels, and audit fatigue is a concern and may make it unattractive for coffee farmers in Guinea.</li> </ul>

## **CHAPTER 5. CONCLUSION AND KEY RECOMMENDATIONS**

Guinea produces 0.1 percent of the world's coffee production and is considered the 34th coffee producing country in the world. Guinea cultivates mainly Robusta coffee and to a small extent Arabica. Guinean coffee is not well known or established on the EU and international coffee market due to its perceived low standard of bean quality.

Available data on coffee production over the past 5 years show a declining trend in production volumes for Guinea coffee. Almost all Guinea coffee produced goes to export and its important EU export market destinations during 2014 to 2018 (by aggregate volume) are: the Netherlands, France, Germany, Italy and Belgium. Since 2017, the sector experienced a sharp decline in export to the world and has remained with this trend. Similarly, EU coffee import (volumes) from Guinea has been in decline during 2015 and 2019. Experts do not see much changes on the short term for Guinean coffee prospects in European market, however they note that with external support and consistent government attention, the prospects could possibly improve. The EU demand for Guinea coffee is almost non-existent and there are a number of key challenges and CSR risks in the sector.

Nevertheless, the untapped export potential for Guinea coffee to the EU and the world is still significant. There are promising coffee producers of Guinean robusta or arabica, like Café Ziama Macenta, Macenta Beans (though based in Germany), Café Foutah, Café Mont Nimba which show good prospects for the sector. The GI label obtained by Café Ziama Macenta, appears to have increased coffee farmer income and the label could potentially be a USP for marketing Guinea's coffee in EU niche and specialty market segment. A handful of EU (specialty) coffee buyers that have experience with Guinea coffee gave good reviews about the coffee bean quality and taste. Below are a few key recommendations (and a list of advice from EU actors interviewed) for CBI to consider when supporting Guinea coffee export to the EU market.

### **5.1 Key recommendations for the CBI project**

Prior to commencing a project in Guinea, CBI could commission a diagnostic mission to visit coffee producers in some of the prominent Guinean highlands where coffee is being grown (e.g. Ziama, Nimba, and Fouta Djallon) and important coffee trading towns in the area (e.g. Yomou, Macenta, Guéckédou, Beyla, and Nzérékoré). The visit could reveal first-hand account of the potential for Guinea coffee from such origins. The mission could also be used to further map and understand the situation and needs of Guinean coffee exporters to the EU. As mentioned in section 4.1.6, despite their crucial role in Guinea's coffee sector, most of the business support organisations (BSOs) lack the necessary organizational and professional capacity and financial resources to be effective in providing the level of support that the sector needs to mature. It is quite challenging to know the right BSOs to mention, therefore we recommend that during the diagnostic mission, CBI should use the opportunity to identify and understand the needs of BSOs in Guinea's coffee sector. They will be crucial to implement the technical assistance and capacity development of coffee chain actors in Guinea. CBI programme manager could conduct this mission together with some interested EU coffee buyers.

Armed with insights from the diagnostic mission, CBI could connect EU buyers to good/reliable Guinean coffee farmers and encourage them to become off-takers of Guinea coffee quality projects. As earlier noted, there is at least one EU buyer willing to work with CBI in bringing quality robusta coffee from Guinea to EU consumers. Some interesting coffee projects seem to exist in Guinea that might need scaling up (e.g. Café du Foutah). CBI could also sponsor some promising Guinean coffee exporters to participate in global specialty coffee exhibitions, coffee fairs and international coffee study tours. Furthermore, CBI could promote Guinea coffee to be used in "Signature blends", i.e. carefully selected coffees from various origins which are blended to reach unique taste palettes. Such blends are used to cater for specific consumer tastes and communicate balance and quality. Examples of signature blends in the Netherlands include Bocca or Borgman & Borgman.

One of the key insights from this study is that most of the EU coffee companies interviewed were unaware that Guinea produces robusta and arabica coffee and has exported robusta to Europe. Awareness raising among EU buyers is needed regarding Guinea coffee and its EU export potentials. As a next step to this study, CBI could develop a webinar to discuss the prospects of Guinea robusta and arabica coffee and encourage some of the EU coffee buyers to take a second look at Guinea coffee. Given the level of competition in the EU specialty coffee market, CBI matchmaking



could help realize access to EU buyers and market for coffee cooperatives who are (near) ready to export good quality coffee from Guinea.

Major private sector initiatives in the coffee sector in Guinea is almost non-existent, and only a handful of EU buyers are committed to this sector. The role of Guinean financial institutions in the sector is unclear and the recent sector initiatives being introduced by the government lack proper coordination. CBI could encourage or catalyse PPP projects to boost production and export of Guinea coffee. CBI could encourage the Guinean government and Dutch private sector actors and institutes to jointly make use of RVO instruments such as Drive, D2B, SDGP facility to further develop the coffee sector (including for the development of coffee-related infrastructure). CBI could encourage Dutch coffee companies to utilize the DGGF to develop specialty coffee projects in Guinea.

Certification of coffee still remains EU consumers' key marker for recognizing high quality coffee, irrespective of the cost issue. Despite the lack of proper data, it is fair to say that most of Guinea coffee are sold as uncertified and ungraded, and as such, most Guinean farmers do not benefit from the price premiums associated with producing and selling certified coffee. Most Guinean coffee cooperatives will likely struggle to meet the EU legal requirements and EU buyer's quality and CSR standards necessary to compete favourably in the EU coffee market (as listed in table 19). Therefore, CBI could support Guinean coffee cooperatives with technical assistance and capacity development to enable them to meet these requirements.

Child labour is still prevalent in the coffee sector in Guinea. As pointed out in section 4.1.9, since this is a key CSR issue for EU consumers (and by extension EU buyers), the extent to which child labour occurs in the coffee sector and concrete solutions to combat this issue should be further explored in subsequent CBI assessments or programs in Guinea. We recommend for CBI to explore working with sector actors, (local) governments, NGO and community gatekeepers to launch and implement child labour free zones (CLFZ) in Guinean coffee communities. Regarding improving opportunities for urban youth, CBI could develop institutional channels in cooperation with multilateral donors, private sector representatives, and the government to implement youth training and employment programs. Furthermore, CBI could encourage Dutch coffee companies to utilize RVO's Fund Against Child Labour subsidy programme to take action against child labour in Guinea coffee sector.

## **5.2 Specific list of advice from EU actors for future CBI program on Guinea coffee**

During the interviews, some EU coffee actors mentioned specific advice for CBI's future program on improving Guinea coffee export to EU. A list is summarized below:

- Focus on small specialty buyers and roasters. Preferably work together with a private sector partner to make the project successful.
- Focus on Arabica and a good story on sustainable production.
- Check the quality before starting any project/programme in Guinea. Potential off takers should also ask for samples.
- CBI needs to make some investment in the field of marketing/branding and storytelling to make roasters aware of Guinean coffee.
- Build trust relations with buyers. Make buyers feel comfortable and secure, when they decide to start sourcing from Guinea. (in terms of quality, on time deliveries, proof of reliability and fulfilment of orders/agreements).
- Make clear which market segment you want to target and determine at the outset the possibility of scaling up the production.
- Not all Guinean coffee can be sold on the specialty market because they are considered low quality, so make a plan where you will sell the lower quality coffee. There could be a potential to sell specialty Guinea Robusta to offices (if available on the market), since Arabica is too expensive for this segment.
- Consider if investments in the Guinean coffee sector will have a positive impact on farmers income and rural development.
- Do not focus on Guinean coffee sector export as the solution, but on farmers livelihoods. Invest in diversification initiatives (e.g. agroforestry) in which coffee can become part of as one of the cash crops. In this way coffee can generate additional income for farmers.

## Annex 1: List of Stakeholders that responded with input either via interviews or email

European Stakeholders	Category	Input via
32 Cup	EU Coffee Buyer	Interview
Coffee Team	EU Coffee Buyer	Interview
Cup A Lot	EU Coffee Buyer	Interview
International Coffee Organization (ICO)	NGO/IGO	Interview
International Trade Center (ITC)	NGO/IGO	Interview
Schluter Olam	EU Coffee Buyer	Interview
Specialty Coffee Association (SCA)	Coffee Associations	Interview
This Side Up	EU Coffee Buyer	Interview
ECOM Trading	EU Coffee Buyer	Interview
Maison P. Jobin & Cie / Neumann Kaffee Gruppe	EU Coffee Buyer	Email
Tropiq	EU Coffee Buyer	Interview
Conservation International	NGO/IGO	Interview
Hivos	NGO/IGO	Interview
IACO-OIAC	NGO/IGO	Email
Max Havelaar	EU Certifications	Interview

## Annex 2: High-level summary of main interview opinions from EU actors

Below is a high-level summary of the main interview remarks/ opinions from EU actors. It is important to mention that this summary does not include information obtained from the consultant's sector experts and informants based in Guinea.

### Perception of Guinea and West African coffee:

- Low and irregular quality Robusta from West Africa.
- Difficulties in meeting the required standards for the European market.
- Robusta is sold to markets with low standards (e.g. Eastern Europe or Arabic countries).
- Bad trading reputation: logistic issues, bad infrastructure, unreliability in quality and quantity, not strict with meeting agreements.
- No strong trust relationships.
- Unstable political issues.
- Unfamiliar with Arabica from Guinea

### Certification and Standards:

- Actors are not familiar with certified coffee from West Africa.
- Certification schemes and standards focus on Arabica coffee. According to actors Robusta is not worth the investment.
- Origin is more important than certification or standards.
- Several actors do not see the value of certification, it is too expensive and lacks the incentive to improve the quality of coffee.
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### Competition:

- Generally, (West) African countries find difficulties competing with the top 10 coffee producing countries. So, Guinea would struggle as well.
- Vietnam and India are the biggest producers of Robusta coffee. They have an efficient production, deliver good quality for a cheap price, and are considered reliable partners.
- Despite its rich coffee history, Guinea coffee sector is still immature compared to most of the other African producing countries

### European Specialty Markets:

- Quality and taste are the most important characteristics for (specialty) coffee.
- There is high demand for Arabica coffee.
- African Arabica coffee is mainly sourced from Uganda and Tanzania.
- Some actors are not familiar with specialty Robusta on the European market (Australia and US are now starting to show interest in specialty Robusta).
- Robusta will be difficult to sell on the specialty market. Buyers often link Robusta to low quality.
- Difficult to differentiate coffee at the speciality market and be competitive. Especially for Robusta.

**European Robusta Markets:**

- Robusta is used for blends. This is unattractive for GI or single origin Robusta.
- Robusta is mainly sold at the conventional market.
- Robusta buyers are price focussed.
- The price of Robusta is low and stable.

**Potential of Guinean coffee on the European market:**

- Actors see most potential for Arabica from Guinea.
- Actors see potential for washed Robusta from Guinea.
- Actors see potential for selling the story of the Ziama Forest Reserve, linked to deforestation issues in coffee production.
- Specialty roasters are always looking for new and interesting origins. Since Guinea is a new origin, people want to try it. Even if the quality is bad, people will cup and taste it.
- Origin is more important than a GI.
- Price for GI Robusta is not competitive on the European (Robusta) market.
- Actors suspect there is no return on investment for Robusta from Guinea. (uncertain market, low demand and low price for Robusta on the market, opposed to high investments for washing and processing facilities).
- High investments are needed to boost the Guinean coffee sector and make the project successful, while the market is uncertain and competitive.
- Actors suspect low quantities of Guinean coffee, not worth large-scale investments.
- Low quality markets demand quantity, while specialty markets demand quality. Actors are not convinced Guinea is able to meet both quantity and quality.

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