

REPUBLIC OF CAMEROON



Paix - Travail - Patrie

Ministry of Commerce  
Ministry of Agriculture and Rural Development  
Ministry of Scientific Research & Innovation  
Ministry of Economy, Planning & Regional Development

2010 – 2015

# CAMEROON COFFEE SECTOR DEVELOPMENT STRATEGY

NATIONAL COCOA  
AND COFFEE BOARD



COCOA AND COFFEE  
INTER-PROFESSIONAL  
BOARD



*To move from a subsistence sector to a professionalized and sustainable sector, economically profitable for all the stakeholders, and to put Cameroon back on the world market map.*

**November 2009**



The present strategy has been put together by the stakeholders of the coffee sector and the Cameroonian institutions.

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All ACP Agricultural Commodities Programme



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In collaboration with:

The International Trade Centre (ITC)



UNCTAD



World Bank



FAO



The Common Fund for Commodities



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# CONTENTS

- Foreword..... ix
- INTRODUCTION..... 1
- I OBJECTIVE AND SCOPE..... 3
  - 1. Objective of the strategy ..... 3
  - 2. Scope of the strategy ..... 4
  - 3. Quantified objectives of sector development ..... 4
- II GENERAL CONTEXT OF THE SECTOR..... 7
  - 1. Historical evolution ..... 7
  - 2. Strengths of coffee growing in Cameroon ..... 8
  - 3. Weaknesses of the coffee sector in Cameroon ..... 8
  - 4. Situation and prospects of the world coffee economy ..... 10
- III SUMMARY OF THE STRATEGY..... 13
  - 2. OBJECTIVE 1 : To increase the volume of production and to improve quality13
  - 3. OBJECTIVE 2 : Professionalize the operators and streamline internal marketing ..... 17
  - 4. OBJECTIVE 3: Open up new markets with competitive coffee..... 19
- IV POTENTIAL RESULTS SCENARIOS..... 21
  - 1. Optimistic scenario ..... 21
  - 2. Other possible scenario ..... 22
- V IMPLEMENTATION PLAN ..... 23
- VI STRATEGY IMPLEMENTATION FRAMEWORK..... 33
- ANNEXE 1: Coffee Value Chain in Cameroon ..... 35
- ANNEXE 2: Cost estimate of the Coffee Strategy ..... 37
- ANNEXE 3: List of participants (meeting 11th and 13th November 2008)..... 41
- ANNEXE 4: List of participants (meeting of 7th and 8th May 2009)..... 45
- ANNEXE 5: List of members having taken part in the Task Force..... 47



## LIST OF ABBREVIATIONS

2P3C	Programme Pilote pour la relance du Cacao, Café et Coton
ACEFA	Programme for the Improvement of Competitiveness of Family Agropastoral Farms
ACRAM	Agency for Robusta Coffees of Africa and Madagascar
ACRN	African Coffee Research Network
ARSEL	Electricity Sector Regulatory Agency
CAMCCUL	Cameroon Cooperative Credit Union League
CICC	Cocoa and Coffee Inter-professional Board
CIPCRE	International Circle for the Promotion of Creation
CIRAD	Centre de Coopération Internationale en Recherche Agronomique
DESA	Direction des Etudes et des Statistiques Agricoles (MINADER)
EDF	European Development Fund
EU	European Union
FAD	French Development Agency
FAO	Food and Agriculture Organization of the United Nations
FODECC	Cocoa and Coffee Development Fund
ICO	International Coffee Organization
IITA	International Institute of Tropical Agriculture
ITC	International Trade Centre
MDRI	Multilateral Debt Relief Initiative
MINADER	Ministry of Agriculture and Rural Development
MINCOMMERCE	Ministry of Commerce
MINEPAT	Ministry of Economic Planning & Regional Development
MINEPIA	Ministry of Livestock, Fisheries and Animal Industries
MINIMIDT	Ministry of Industry, Mines and Technological Development
MINRESI	Ministry of Scientific Research & Innovation
IACO	Inter-African Coffee Organization
NAERP	National Agricultural Extension and Research Program
NCCB	National Cocoa and Coffee Board
PAC	Projet d'Assainissement de la Commercialisation interne dans les filières cacao et café
PACICC	Programme d'Appui au Conseil Interprofessionnel du Cacao et du Café
PAD-MC2/MUFA	Projet d'Appui au Développement des Mutuelles Communautaires de Croissance/Mutuelles des Femmes Africaines
PAIJA	Programme d'Appui à l'insertion des Jeunes en Agriculture
PAJER-U	Programme d'Appui à la Jeunesse Rurale et Urbaine
PCRD	Projet d'Appui au Développement du Crédit Rural Décentralisé
PIB	Public Investment Budget
PRSP	Poverty Reduction Strategy Paper
PPDMVCC	Projet d'appui à la Production et à la Diffusion du Matériel Végétal de Cacao et de Café
PPDR	Projet Pôle de Développement Rural

PPVCC	Projet d'appui à la Protection du Verger Cacao/Café
PRSSE	Programme de Reforme du Sous Secteur Engrais
PSCC	Programme Semencier Cacao Café
RSDS	Rural Sector Development Strategy
SCTP	Sustainable Crop Tree Programme
SIF	Sector Information System
SMVAB	Sélection et Diffusion du Matériel Végétal amélioré de Base en vue de l'amélioration de la productivité des vergers cacaoyer et caféier
SRC	Cameroon Debt Recovery Company
UNCTAD	United Nations Conference on Trade and Development
WB	World Bank
ZEW	Zone Extension Workers

## **I. Foreword**

This document, the Cameroon Coffee Sector Development Strategy, reflects all the debates, reflections and proposals of all stakeholders. This strategy aims to move it from a subsistence sector to a professionalized and sustainable sector, economically profitable for all stakeholders, and to put Cameroon back on the world market map.

This vision is in perfect line with Government priorities regarding social, economic and rural development. It is particularly expected to have an impact in reducing poverty in rural areas.

In order to elaborate this strategy, a wide consultation took place with the various elements in the value chain, with Government services as well as available international expertise.

This strategy therefore represents the will of sector stakeholders to each play their role, to actively contribute to its recovery and to return it to its former glory.

The Coffee Sector Development Strategy presents a number of observations and strategic directions on which the stakeholders have become convinced they can use to move it in the right direction.

Even so, work has only just begun.

This document invites the parties concerned to translate the orientations and recommendations into concrete actions by mobilizing, within an integrated framework, the resources from the entire sector, and beyond. The success of this strategy is closely related to Cameroon's capacity to acquire an implementation framework which guarantees that priority is given to the sector, the integration of resources and efficiency in execution.

The present strategy is not an end in itself; it must evolve with our capacity to collectively crystallise the results and to adapt to the changes in the national, regional and global context.

In order to keep its credibility and its validity in the eyes of the sector's active workforce, this strategy must be used as a planning framework recognized in Government action and benefit from the best available resources. In order for this to happen, it must be regularly updated by all the stakeholders.

All in all, it is the meeting point for the development of the Coffee sector in Cameroon.

*Ministry of Scientific Research & Innovation*

*Ministry of Agriculture and Rural Development*

*Ministry of Commerce*

*Ministry of Economy, Planning & Regional Development*



# INTRODUCTION

In April 2003, Cameroon drew up and adopted the Poverty Reduction Strategy Paper (PRSP) in which our country commits to carrying out reforms aiming at reducing poverty through strong and sustainable growth.

Within the framework of that strategy's implementation, the Government acquired a Rural Sector Development Strategy (RSDS), updated in 2005.

One of the objectives of the RSDS is to achieve sustainable development of agricultural, animal, fishing, fauna and forestry production. The set objective is to put a framework in place which enables sufficient and quality production. **Levels of production that fulfill the objectives will need to be reached: in terms of food safety, rural sector growth, increase of producer incomes and export growth.**

In addition, **product processing and the development of competitiveness of the production sectors** were brought forward, among others, within the modernization of production envisaged in the strategic directions.

Coffee (Arabica and Robusta) is well placed on the list of products for which production increase objectives were set.

In light of the continuous decrease of exports and market share of Cameroon coffee at international level, the Cameroonian authorities launched a participative process for the development of a specific coffee sector development strategy.

With this in mind the Cameroon Ministry of Commerce requested the technical support of the International Trade Centre (ITC).

Using ITC's sector strategy development methodology, the intervention of the ITC facilitated the creation of the Coffee Sector Development Strategy and its implementation plan, and the organization of its follow-up by the national stakeholders.

With the participation of the National Cocoa and Coffee Board (NCCB) and the Cocoa and Coffee Inter-professional Board (CICC), the first two workshops took place the 11<sup>th</sup> and 13<sup>th</sup> of November 2008, in Bafoussam and Douala respectively.

The 11<sup>th</sup> November 2008 workshop in Bafoussam was devoted to the problems of production; it brought together 83 participants among whom were producers (large and small), co-operative leaders, researchers and extension officers.

The 13<sup>th</sup> November 2008 workshop in Douala brought together 72 participants representing all the categories of direct and indirect operators who take part in the coffee sector (producers, millers, exporters, forwarding agents, quality controllers, phytosanitary control companies, input distributors, financing services, extension services, public services, project leaders, etc).

A third workshop was held on 7th May 2009 in order for the stakeholders of the sector to validate the implementation plan that had resulted from the two preceding workshops.

The European Union, the World Bank, the Food and Agriculture Organization of the United Nations (FAO), the United Nations Conference on Trade and Development (UNCTAD), and the Inter-African Coffee Organization (IACO) actively participated in the development of this strategy.

The Ministry of Commerce (MINCOMMERCE), the Ministry of Agriculture and Rural Development (MINADER), and the Ministry of Economy, Planning & Regional Development (MINEPAT) who are sponsoring this initiative were represented at all the events and meetings throughout the process.

# I OBJECTIVE AND SCOPE

## 1. Objective of the strategy

The Cameroon Coffee Sector Development Strategy and its implementation plan were created:

- to improve sector performance at all levels of the value chain, from research to consumption, through production, marketing (internal and external), processing and promotion;
- to facilitate the development of prioritized implementation activities through a framework and a plan with activities that have been indexed and organized in a participative way; and,
- to integrate dynamic progress measurements for the follow-up of the execution of this implementation plan.

The Cameroon Coffee Sector Development Strategy was also designed to enable decision makers to better plan and coordinate the various interventions directed towards the coffee sector.

Lastly, this strategy document can be used as a communication tool with sector stakeholders who did not participate in the various workshops (Bafoussam, Douala and Yaoundé), in order for them to get information about the activities to be implemented to improve competitiveness of the sector.

This strategy applies to all sector stakeholders:

- producers;
- buyers;
- millers;
- exporters;
- roasters;
- forwarding agents;
- roasted coffee distributors;
- input distributors;
- quality control companies;
- phytosanitary treatment companies;
- transporters;
- banks;
- extension services;
- research services;
- supervision services;
- professional organizations;
- specialized governmental agencies and administration;
- tax and customs services;
- equipment suppliers.

The main direct recipients of this strategy are the operators of the sector, i.e.: producers, buyers, millers, exporters and roasters.

Thanks to this document, the public authorities, as indirect beneficiaries, will be able to create and plan policies and programmes within the context of the development of the various areas of the country.

## 2. Scope of the strategy

The Cameroon Coffee Sector Development Strategy initially covers the whole of the traditional coffee sector value chain: research, production, milling, internal marketing and export.

In accordance with the International Coffee Organization recommendations the strategy which has been elaborated in a participative way with all the stakeholders of the Cameroon coffee sector goes beyond the traditional sector and extends to all aspects relating to domestic processing and consumption.

Thus, the Cameroon Coffee Sector Development Strategy covers, as regards roasted coffee, the fields relating to local and sub-regional markets.

Apart from public services, governmental agencies and support services, the expected beneficiaries, approximately three million people, are distributed, according to their activities, in the following way:

- production: 400.000 households, representing approximately 2.8 million people;
- milling: 10.000 direct and indirect jobs, which would provide a livelihood for approximately 70.000 people:
- marketing: 10.000 direct and indirect jobs, which would provide a livelihood for approximately 70.000 people:
- processing and distribution: 1.000 direct and indirect jobs, which would provide a livelihood for approximately 7.000 people:
- quality control and phytosanitary treatment: 1.000 direct and indirect jobs, which would provide a livelihood for approximately 7.000 people, and
- ancillary services, notably transport, port handling and transit: coffee could permanently provide an estimated 1.000 direct and indirect jobs, which would provide a livelihood for approximately 7.000 people.

## 3. Quantified objectives of sector development

Backed by the public authorities' commitment, seen through the resources allocated to the various programmes undertaken at various levels of the sector, the stakeholders laid down quantified objectives for the coffee sector for 2015:

**Production:** 125.000 tons<sup>1</sup> of which 25.000 tons of Arabica and 100.000 tons of Robusta.

**Exports: at least** 80.000 tons<sup>2</sup>, of which 15.000 tons of Arabica and 65.000 tons of Robusta.

**Domestic Consumption:** 10.000 tons of green coffee.

**Sub-regional market:** in the absence of any references (statistics, market research), it was not possible to set a quantified objective for roasted coffee exports in the sub-region (Central Africa and Nigeria). Reflection on this topic will continue in targeted professional consultations.

In the light of Cameroon's performance in these past years as much in terms of production as in exports, the objectives chosen by the stakeholders of the coffee sector are certainly very ambitious, but they remain attainable in the best scenarios.

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<sup>1</sup> Estimate source RSDS - 2005

<sup>2</sup> Estimate source: Bafoussam and Douala workshops (November 2008)

Attaining these objectives is closely linked to the level of commitment of institutional and private stakeholders and to the adopted implementation plan, as well as to the capacity of each one to mobilize resources and deliver the expected efforts within a coordinated framework.

The strategy summary in section 3 describes the expected results for each strategic objective.



## II GENERAL CONTEXT OF THE SECTOR

### 1. Historical evolution

**Production and Exports:** Looking at the last thirty years clearly highlights an overall trend in decline of Cameroonian production and coffee exports beginning in the 1990's. The lowest point was reached during 1992-1994, years of liberalization of the sector. After a recovery which stopped at the end of the 1990's, the fall seems worryingly to have unrelentingly re-started.

**Table 1:** Production and Exports of Cameroonian Coffee

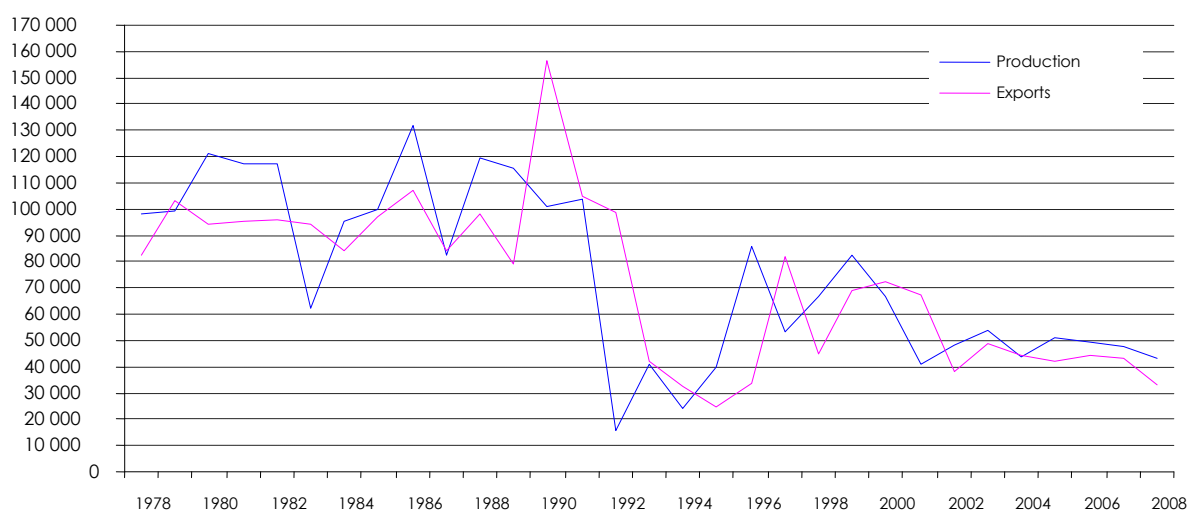
<u>Years</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>	<u>1985</u>	<u>1986</u>	<u>1987</u>	<u>1988</u>
<u>Production</u>	99 480	121 080	117 540	117 000	62 040	95 220	100 020	132 000	82 500	119 400
<u>Exports</u>	103 098	94 430	95 404	95 832	93 978	84 360	96 965	107 319	84 401	97 958

<u>Years</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1992</u>	<u>1993</u>	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>
<u>Production</u>	115 680	100 920	103 560	15 600	40 920	24 360	39 600	85 920	53 340	66 840
<u>Exports</u>	79 090	156 676	105 131	98 751	42 272	32 753	24 436	33 813	82 082	44 743

<u>Years</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>
<u>Production</u>	82 200	66 780	41 160	48 060	54 000	43 620	50 919	49 643	47 700	43 000
<u>Exports</u>	69 243	72 298	67 510	38 381	48 860	44 060	42 264	44 390	43 031	33 000

Source: ICO

**Table 2:** Evolution of production and exports of Cameroonian coffee over the last thirty years



**Traditional markets:** Exports of Cameroon green coffee are principally destined to Italy for Robusta (over 40% of total exports in 2007-2008) and Germany for Arabica (over 70% of total exports).

Other destinations are:

- Robusta: Belgium, Portugal and France.
- Arabica: USA, Italy and Belgium.

**Processing and Internal Consumption:** The latest survey of domestic coffee processing and consumption in 2006, gave a report on a situation in decline since 2000. It went from 6.000 tons in 1999 to 4.500 tons in 2000. It has remained stagnant at around 4.000 tons since 2001.

Without being able to back it up with precise data, an increase has however been observed in the past two years in the number of roasted coffee brands on supermarket shelves. Indeed, 24 roasters were listed at the end of 2007. Data collected from these roasters (approximately 7.000 tons processed) suggest an increase in local, and probably sub-regional, coffee consumption.

## 2. Strengths of coffee growing in Cameroon

Cameroon has major strengths for the development of coffee growing, among which are:

- Fertile soil and an ideal climate for coffee growing;
- Farm expansion possibilities;
- An active and young population;
- A long tradition of coffee production and a good knowledge of the product by the producers;
- A diverse production (Arabica and Robusta);
- Good product processing services in the production zones;
- Good handling services at port level in Douala (warehouses, warehouse receipt etc);
- An intrinsic quality, which markets appreciate;
- Faithful customers, notably in Europe.

In production zones, the coffee sector in Cameroon has kept its image of being a sector which enabled the schooling of many of the elite and substantially contributed to the development of Cameroon. This is why many of its stakeholders are prepared to remain in it or re-enter it.

As in the cocoa sector, the coffee sector benefits from a real organization which dates back to before the Sixties. It does not need to be built from scratch. Private and governmental services were put in place with the mission (exclusive for some of them) of developing and supporting the sector.

This is all likely to facilitate the implementation of a revival strategy.

## 3. Weaknesses of the coffee sector in Cameroon

The diagnoses carried out within the workshops for the elaboration of the strategy<sup>3</sup> give the following main weaknesses throughout the value chain

### **In research:**

- a practical halt to research on coffee;
- the serious reduction in existing germ-plasm collections due to inadequate care;
- insufficient co-operation with the international research networks.

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<sup>3</sup> Held in the context of All ACP Agricultural Commodities Programme

Moreover, the genetic variability of the coffee trees in Cameroon remains very narrow, which exposes it to irreversible damage in the event of the appearance of new diseases. For example, only two varieties of Arabica coffee trees are cultivated in Cameroon (Java and Jamaïca) of which only one (Java) is resistant to diseases such as C.B.D.(Coffee Berry Disease) and rust.

**In production :**

- scarcity and high cost of inputs;
- debatable quality of imported inputs;
- insufficient reliable production and seedling multiplication services;
- no steps taken to regenerate old plantations;
- reduced size and low productivity of plantations;
- little diversification of producer income;
- ageing growers and the lack of incentives in favour of young growers;
- the absence of strong and structured producer organizations;
- lack of technical equipment at all levels of the value chain, and in particular of the washing and pulping stations;
- insufficient, and in some cases, no infrastructure (stores);
- insufficient extension of the best growing methods and use of chemical inputs.

**Internal marketing:**

- no information system which covers all production regions and all activities of the sector;
- no market centres or suitable equipment;
- inadequate national norms that follow the developments in the international market;
- producers have little knowledge of quality control and liquoring;
- lack of awareness of marketing rules and techniques;
- door-to-door purchasing by buyers;
- difficulty in accessing the right financing.

**External marketing:**

- the down-grading and virtual disappearance of 'Origine Cameroun';
- lack of buyers' trust;
- no strategy for approaching the market;
- the systematic positioning of Cameroon coffee as bottom-of-the-range;
- promotion insufficiently dynamic.

**Domestic processing and consumption:**

- outdated roasting equipment;
- no roaster organization;
- lack of knowledge of roasting standards;
- no permanent promotion programme for consumption and promotional events;
- lack of aggressively conquering sub-regional markets;
- no market research and data on consumption.

#### 4. Situation and prospects of the world coffee economy

For over thirty years, the price of coffee has been decidedly volatile, the international coffee sector found itself in a situation where for certain periods, in particular 2001-2004, the selling price was below the real cost of production. Any revival strategy of coffee production in Cameroon must be integrated within the framework of a dynamic fast changing global market and on various levels.

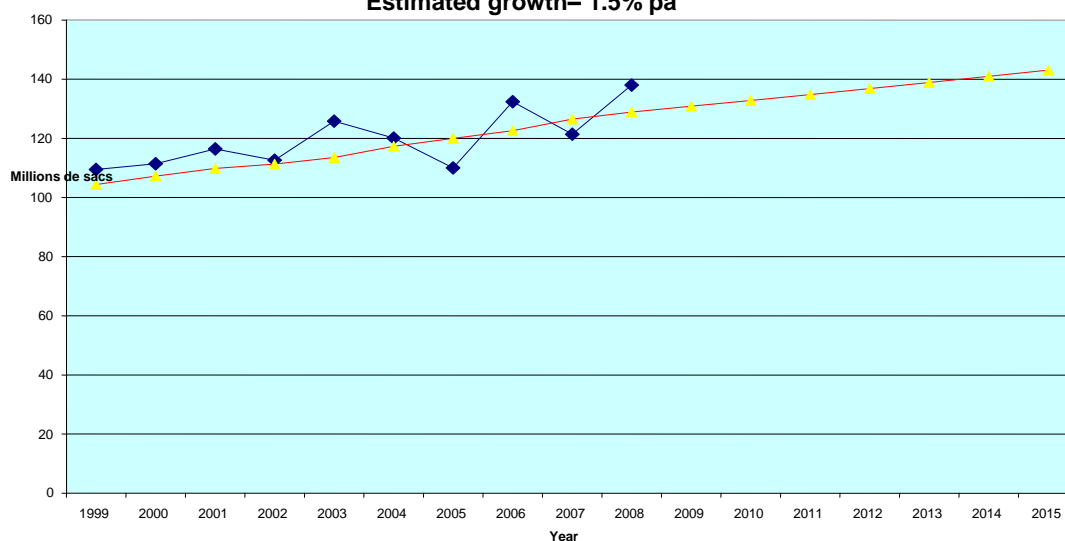
**Table 3: LIFFE prices, London (Jan 1991 – Aug 2009)**



**Global supply and demand:** since the beginning of the years 2000, production fell to a significant degree in several producer countries. The low prices and a lack of interest among producers led to generalized discouragement

The period of low prices encouraged an increase in consumption. It progressed at more than 2% per annum between 1994 and 2007. The graph of supply and demand below shows a positive growth trend of demand, and an irregular supply, because of cyclic production, in particular in Brazil.

**Coffee – Supply and Demand 1999 - 2015**  
Estimated growth– 1.5% pa



Source: ICO/NKG

**World stocks:** the only stocks available are those from the current crops in producing countries. Currently, the stocks stored in the ports of the consumer countries are about 20 to 22 million bags. Compared to a global consumption of approximately 130 million bags per annum, this represents only 2 months' consumption.

In addition the worldwide market is increasingly dependent on 3 producing countries: Brazil, Vietnam, and Colombia. These three producers represent more than 60% of the total market. If a serious problem occurred in one of these 3 countries, effects on the market would be immediate. This was the case in 2009 for washed Arabica, due to the reduction of the production volume in Colombia. This created a distortion in the price of all gourmet washed Arabica during the first six-months of 2009.

**The economic crisis:** The growth of demand paused slightly at end 2008 - early 2009 because of the financial crisis which affected the whole of the worldwide economy. On the coffee market, this crisis had a negative impact on the level of consumption of gourmet coffees in certain traditional markets (the United States), and a deceleration of growth in certain new markets (Eastern Europe). But in general, the specialists in the market estimate that demand remains strong, and that the growth rate of the worldwide coffee consumption will be maintained at approximately 1% per annum (instead of the 2% envisaged before the financial crisis).

Strong increase of production in Vietnam over approximately the last 20 years, and the production in Brazil, which in 2010 could reach 55 to 60 million bags, may result in prospects which, in the short term, do not seem very favourable for the markets. But it should be noted that in these 3 last years the prices on the Futures markets remained above cost price for an efficient producer. All producing countries face the same problems and have the same challenges.

In this context, it is important to keep an eye on the competitiveness of production in Cameroon compared to competitor producing countries, in particular Brazil and Vietnam. In these countries, the strong productivity of plantations makes the coffee very competitive. Moreover, the countries where production is increasing are those where the producers receive between 80 and 90% of the FOB price of the product. Sustainability of the revival of production will be the main issue for a high-performing sector.

At the time of the World Coffee conference in Brazil in 2005, global demand for coffee had been projected for 2015 at between 145 and 150 million bags (NKG). The improvement of productivity in Cameroon can benefit from this increase in demand, and at the same time, contribute at the internal level to reach the first Millennium goal set by the United Nations, namely the reduction of poverty.

### **Competition from other crops - food products and bio fuel:**

Increase in world population, climate change which is becoming increasingly apparent, and energy demand are three additional parameters which encourage optimism as to coffee prices in the years to come. Indeed, demand for agricultural products is increasing, whereas arable acreage remains practically the same. A growing competition exists between the various crops which require the same land.

For countries such as Cameroon, which have resources and a definite potential, (land, water, labour, etc), a higher level of production would undoubtedly answer the needs of a market needing more coffee. At the same time, this situation, favourable at first glance, should in no case eclipse the problems of productivity of the farms in Cameroon.



### III SUMMARY OF THE STRATEGY

#### 1. Strategic vision

The strategic vision for the development of the sector that came out at the conclusion of the reflection carried out during the three workshops by the various sector stakeholders is as follows:

**To move from a subsistence sector to a professionalized and sustainable sector, economically profitable for all the stakeholders, and to put Cameroon back on the world market map.**

The developed strategy is centred around three general objectives:

- **Objective 1:** To increase the volume of production and to improve quality.
- **Objective 2:** To streamline internal marketing and professionalize the operators of the sector.
- **Objective 3:** To conquer new markets (domestic, regional and niche markets) with a competitive coffee

The following are the main results anticipated in the five years that follow the adoption of this strategy:

- increased production through the combined effect of new plantations and rejuvenated old plantations;
- young growers established in coffee growing;
- strengthened research;
- modernized and strengthened sector information system;
- professionalized coffee sector operators;
- improved wet processing which would open up new markets and the speciality coffee markets;
- suitable financing mechanism put in place;
- new international and sub-regional markets conquered;
- increased local processing and consumption.

#### 2. **OBJECTIVE 1 : To increase the volume of production and to improve quality**

Coffee exports of Cameroon origin (Robusta and Arabica) dropped by 76% between 1986 and 2008, going from almost 110.000 tons to 33.000 tons. There has been an unrelenting decrease from one year to the next. At this rate, it is likely there will be no coffee production in Cameroon in ten years' time.

Yet the international coffee market prospects seem good in the medium-term. Indeed, with an annual growth rate of approximately 2%, worldwide coffee consumption is estimated at between 145 and 150 million bags in 2015 compared with 130 million bags in 2008, an increase of 15 to 20 million bags by 2015.

The coffee producing countries are positioning themselves in order to benefit from the growth in the market. ***The development of the coffee sector in Cameroon needs to pre-empt the opportunities offered by the international market.***

The stakeholders of the sector agree that the withdrawal of the State during the liberalization of the sector in 1995 was at the origin of several of the problems that exist today. The deterioration of world prices between 2000 and 2003 caused the disaffection of producers and the fall of production as well as the deterioration of quality.

Therefore the increase in coffee production to fight poverty and to improve the living conditions of the populations concerned will need the following issues to be addressed:

- absence of a specific support policy for the sector;
- failure of the national extension service;
- no or outdated technical equipment;
- difficult access to land and property ownership;
- infrastructure in a state of disrepair;
- high cost and low availability of inputs.

The first objective of the Cameroon Coffee Sector Development Strategy (To increase the volume of production and to improve quality) was expanded by the participants of the workshops into seven sub-objectives:

- to facilitate access to inputs;
- to support the rehabilitation of old plantations;
- to promote the establishment of young growers;
- to strengthen research;
- to set up production incentive programmes;
- to promote the purchase of modern and high-performing equipment;
- to strengthen capacity at production level.

#### **Prioritized implementation plan of objective 1:**

##### ***Facilitate access to quality inputs***

- Revive good quality seedling production services by involving POs and integrating transport problems;
- Regularly supply fertilizers and pesticides (insecticidal and fungicide) recommended for coffee growing;
- Intensify quality control of imported agricultural inputs (fertilizers, pesticides, etc) by involving the input suppliers;
- Develop manufacturing capacity for organic fertilizers and pesticides.

##### ***Support rehabilitation of old plantations***

- Survey of existing trees;
- Develop regeneration programmes of old plantations;
- Set up facilities for regeneration and maintenance of old plantations and abandoned exploitations (e.g.: Plants, Fertilizers, ZEW).

### ***Promote establishment of young growers***

- Make support available for young growers to get established;
- Diversification of coffee growers' income and of young growers in particular [agriculture (cash and food crops) + livestock];
- Creation of pioneer fronts (land allocated and made available for coffee and food crops);
- Construction of community camps and huts.

### ***Strengthen research***

- Rehabilitation and enrichment of collections (prospect for local varieties and carefully monitored introduction of new varieties)- Co-operation with other producing countries;
- Increase in the number of improved varieties to disseminate to the producers (selection and variety improvement):
- Expertise of international research organizations;
- Soil study and mapping;
- Research on manufacture of organic fertilizers and pesticides.

### ***Set up production incentive programmes***

- Strengthen extension services and ZEW, and intensify awareness at PO level;
- Give incentives to invest in the coffee growing economy (promote coffee growing) at all levels of the value chain.

### ***To promote the purchase of modern and high-performing equipment***

- Build and rehabilitate warehousing facilities in the production zones;
- Update studies and build coffee pulping and washing stations (Central Processing Units (CPU)):
- Build drying surfaces to benefit POs in the production zones;
- Supply producers with phyto-sanitary treatment appliances and equipment.

### ***To strengthen capacity in terms of production:***

- Train farmers on how to use inputs;
- Produce an agricultural best practice manual on coffee;
- Continuing education for producers on farming and post-harvest best practices:
- Recruit and train coffee specialists at various levels (senior level and technicians);
- Train craftsmen to repair agricultural equipment.

### Results and indicators of progress:

EXPECTED RESULTS	INDICATORS OF PROGRESS
- Old plantations are rejuvenated	- Total areas rejuvenated or in planning stage.
- New plantations are created	- New areas created or in planning stage.
- Young farmers are established in coffee growing	- Number of young farmers established
- Producer access to extension, inputs and equipment is made easier	- Available extension programme; - Number of producers or PO's who have access to extension services; - Level of ownership by stakeholders of the training topics; - Best practice agricultural manuals on coffee available (production, inputs, phyto-protection, material, equipment).
- Infrastructure is created and/or renovated	- Number of storage warehouses, schools, health centres, water sources... built or rehabilitated; - Length of road built or reinstated.
- Easier access to land and building ownership	- Area of allocated land made available to the producers; - Time of delivery of deeds.
- Strengthened research	- Number and importance of research results disseminated amongst producers; - Results on soil study.

**THE PROBLEM OF PRODUCTIVITY:** In the global context of growth of coffee consumption, **productivity** remains one of the big challenges. According to statistics, the coffee grower in Cameroon produces approximately 300 kg of green coffee (Robusta and Arabica) per hectare. The average per hectare in Vietnam is approximately 2.500 kg. In Brazil, outputs can go up to 6.000 kg per hectare for Robusta. For Arabica, the Brazilian average is about 1.150 kg per hectare.

As explained earlier (**in section 2.4**), the competitiveness of Cameroonian coffee comes from improved productivity accompanied by the reduction of production costs. This is essential to enable the coffee grower to live off his farm even during the times when the market is at low prices.

If the level of productivity is not improved, there is a high risk that coffee growers who are victims of current market speculation withdraw from coffee in favour of other, more profitable crops.

This situation challenges Cameroon as to the importance of research and extension in variety improvement, growing methods and the renewal of coffee trees in the years to come.

### 3. **OBJECTIVE 2 : Professionalize the operators and streamline internal marketing**

State withdrawal from marketing following the liberalization of the coffee sector placed the producer in front of a plethora of buyers who are not very professional. Hence, they go through the production zones, buying the coffee, often in dried cherry, before it has been milled.

This situation and source of vulnerability resulting from the impoverishment of the populations concerned, is exacerbated by the inadequacies of the national information system and the absence of suitable financing for the development of the sector.

The actors of the sector deemed that it was necessary to streamline coffee marketing and to professionalize all the operators in order to optimize and make the marketing process more fluid, to put a quality product on the market, and to enable the producers to receive a fair price for their efforts.

Objective 2 of the Cameroon Coffee Sector Development Strategy (To streamline internal marketing and professionalize the operators) was subdivided into the six following sub-objectives:

- equip the sector with an efficient information system;
- promote quality in the marketing network;
- promote emancipation of Producer Organizations;
- promote commercial best practice;
- facilitate financing for coffee growing;
- promote a participative approach and favour synergies in the sector.

#### **Prioritized implementation plan for objective 2:**

##### **Equip the sector with an efficient information system**

- Re-enforce the information system by involving the entire sector;
- Communicate measures taken for the revival of the sector;
- Set up a Coffee Exchange.

##### **Promote quality in the marketing network**

- Adapt the national norms for determining quality to the evolution of the international market;
- Equip POs with suitable tools (scales, moisture meters, etc.) ;
- Promote general application of pre-control by POs and buyers;
- Reinstate measures aimed at giving recognition prizes to the best farmers and/or operators;
- Implement a traceability system/Specialty coffees.

##### **Promote emancipation of Producer Organizations**

- Support creation of producer groups and reinstate the grower's pass-book;
- Quality control training for farmers;
- Continuing Education for producers on management, packaging and marketing;
- Promote stable partnerships between producers and buyers;
- Introduce producers to liquoring;
- Promote other coffee products (other than bean).

- **Promote commercial best practice**

- Producer Organizations encourage group sales, that follow market calendars;
- POs organize market days in production zones;
- Job description drafted for each category of operator in the sector.

- **Facilitate financing for coffee growing**

- Set up tools more suited to the trade of basic commodities (e.g. warehouse receipts and warrants);
- Expansion of micro-finance for smallholders in production zones;
- Set up a credit line or a Guarantee Fund for crop finance to benefit POs.

- **Promote a participative approach and favour synergies in the sector**

- Specific professional workshops devoted to targeted topics: exports, markets, milling, fertilizers, consumption, etc.

**Results and indicators of progress:**

EXPECTED RESULTS	INDICATORS OF PROGRESS
<ul style="list-style-type: none"> <li>- The information system in the sector is improved and operational</li> </ul>	<ul style="list-style-type: none"> <li>- Number and distribution of relay points and information sources,</li> <li>- Number of media involved</li> <li>- Level of territory coverage of disseminated information (number of coffee farmers listening to this information).</li> </ul>
<ul style="list-style-type: none"> <li>- The operators of the coffee sector are real professionals</li> </ul>	<ul style="list-style-type: none"> <li>- Quantity of products sold through producer organizations (GIC, co-operatives, GIE...),</li> <li>- Directory of available operators with mapping,</li> <li>- Regular meetings and good quality reports by the various professions.</li> </ul>
<ul style="list-style-type: none"> <li>- Increase in production of good quality coffee</li> </ul>	<ul style="list-style-type: none"> <li>- Quantity of superior grade coffee produced,</li> <li>- Quantity of gourmet coffee exported</li> </ul>
<ul style="list-style-type: none"> <li>- Suitable financing mechanisms are put in place</li> </ul>	<ul style="list-style-type: none"> <li>- Number of operators beneficiaries of financing.</li> <li>- Number of credits received by operators:</li> <li>- A mechanism exists to guarantee credits in favour of agricultural sector.</li> </ul>
<ul style="list-style-type: none"> <li>- Interventions in the sector are better coordinated and synergies are observed.</li> </ul>	<ul style="list-style-type: none"> <li>- Less overlaps observed;</li> <li>- Number of specific professional workshops.</li> </ul>

#### 4. **OBJECTIVE 3: Open up new markets with competitive coffee**

Growth in Cameroon is due, among other things, to raw material exports of agricultural origin, including coffee. But the dependence of Cameroon on a reduced number of products and partners is a source of vulnerability.

This situation led the public authorities to set up a policy of diversification of exports with the diversification of partners on the one hand, and the diversification of products to export on the other hand as fundamental elements, with a priority given to products with strong added value. With this in mind, the stakeholders of the sector agreed that it is to the advantage of the coffee sector to increase local coffee processing, and to aim to gain new markets, both for processed coffee and for specialty coffees.

In order to access these markets and to strengthen the competitiveness of coffee, it is necessary to accelerate export procedures being made easier and to set up a real promotion programme for Cameroonian coffee.

##### **Prioritized implementation plan of objective 3:**

###### **Increase domestic processing and consumption of coffee**

- Promote investment and knowledge acquisition in coffee processing;
- Permanent promotion campaign to improve the status of coffee compared to other drinks - Inform population on the virtues of coffee and how to prepare it;
- Develop coffee consumption in its various forms;
- Annual coffee promotion event;
- Organization of roasters.

###### **Find new markets**

- Comparative study of competitiveness on the international market;
- Identify the best market potential;
- Bringing capacities to higher level (adjust to market needs);
- Develop and implement a promotion programme of Cameroon coffees on the international scene;
- Seek new, lesser known markets;
- Develop niche markets, in particular for fully washed coffee and various certifications;
- Study to assess the potential of the sub-regional market (Central Africa and Nigeria) for roasted coffee.

##### **Results and indicators of progress:**

<b>EXPECTED RESULTS</b>	<b>INDICATORS OF PROGRESS</b>
- New markets are opened up	- Knowledge of new markets; - Quantity of coffee sent to the new destinations.
- Local processing and consumption have increased	- Roasting capacity and quantity of coffee roasted; - Quantity of coffee consumed; - Diversity of coffee products on the market.



## IV POTENTIAL RESULTS SCENARIOS

### 1. Optimistic scenario

#### If:

- Physical, information and financial flows in the sector are facilitated;
- The sector organizes itself, sets up a structure, the stakeholders position themselves in the value chain and develop an inter-professional approach to achieve the set goals;
- The stakeholders of the sector meet regularly to discuss their joint position in order to present their aspirations to the government, to the support services, to the NGO's and the international development agencies;
- Appropriate governmental measures, which have been discussed with the sector, enable exports to be more competitive;
- Collection in the producing areas is well organized and transport logistics enable production to be sent to its destination in excellent conditions resulting in a minimum of rejects;
- The quality of the products is in line with international regulation (traceability, certification and packaging) and the sector develops a policy of diversification of products;
- The sector stakeholders receive the right training for each stage of the value chain and enable them to acquire more adapted techniques;
- The sector receives support services for trade and better support thanks to a modernized information system;
- Financing mechanisms enable the stakeholders to have access to financing under acceptable conditions enabling them to modernize their operations and to be able to develop processing units
- The sector is strengthened thanks to the revival programme and sector promotion activities are increasingly effective.

#### Then:

- In the months to come, the sector will prepare itself to becoming competitive and the stakeholders of the sector will mobilize themselves to achieve the goals they have set for themselves. A more organized sector will also enable the stakeholders to have a common vision for production and marketing, to position themselves in the sector and to prepare for international competition.
- In the 5 next years, the sector will become competitive in comparison with the other coffee producing countries, will reinforce its position on the existing markets and will have access to new markets, will be acknowledged by the buyers as a sector which honour its commitments and offers diversified quality products. Moreover, participating in international exhibitions and establishing a promotion policy for the sector will contribute to its development and will strengthen its image internationally.
- This momentum towards a better productivity and a more professional approach on the markets will enable the sector to create wealth in the next five years which will increase the incomes of the stakeholders and of their families, will create new jobs and will develop the necessary activities/services for the good development of the sector.

## 2. Other possible scenario

### If:

- The prioritized objectives and the listed activities are not set up, the sector will not be able to use the existing potential which could have made it an example of revival. The coffee sector in Cameroon will still have to face growing concerns. Operators and their families will have to develop personal strategies and new activities. The quality and volume of products on offer will be beyond the aspirations of the stakeholders.

### Then:

- Cameroon coffee growing will most probably no longer exist under its current organized sector form. Cameroon will become a small producer with a marginal production, and of course, 'Origine Cameroun' will no longer be found on the market.

# V IMPLEMENTATION PLAN

## Implementation plan of the Cameroon Coffee Sector Development Strategy

### OBJECTIVE 1: INCREASE THE VOLUME OF COFFEE PRODUCTION AND IMPROVE QUALITY

OBJECTIVE	Sub objective	Activities	Activity N°	PRIORITY	Action Type	Direct Beneficiaries	EXISTING NATIONAL MEASURES		Additional support needed
							In charge of implementation	Actions in progress	
1 - INCREASE THE VOLUME OF COFFEE PRODUCTION AND IMPROVE QUALITY	<b>1.1. FACILITATE ACCESS TO QUALITY INPUTS</b>								
		- Revive good quality seedling production services by involving POs and integrating the transport problems	111	<b>1</b>	Grants, Production	Producers	<b>MINADER</b> : - (a) 2P3C - (b) PSCC - (c) PPDMMCC <b>MINRESI</b> : (d) SMVB (C)	a: pilot project in first phase b: activities in progress – very limited means c: began in 2009 d: began in 2009	Technical and logistical support for seedling multiplication
		- Regularly supply fertilizers and pesticides (insecticidal and fungicide) recommended for coffee growing	112	<b>1</b>	Grants, Agreements	Producers	<b>MINADER</b> : - (a) 2P3C - (b) PPVCC - (b) PRSSE <b>MINCOMMERCE</b>	a: at beg of 2 <sup>nd</sup> phase b: covers 10% of all coffee trees	Set up fund for group purchases; organize distribution through POs
		- Intensify quality control of imported agricultural inputs (fertilizers, pesticides, etc) by involving the input suppliers	113	<b>1</b>	Grants, Regulation	Producers	<b>MINADER</b> : (DRCQ) <b>MINRESI</b> :	To be set up	Develop capacities, technology transfer for control
	<b>1.2. SUPPORT REHABILITATION OF OLD PLANTATIONS</b>								
		- Survey of existing trees	121	<b>1</b>	Survey	MINADER, PO	<b>MINADER</b> : (DESA) <b>MINRESI</b> : INS	No recent survey	Financing of survey on existing coffee trees
	- Develop regeneration programmes of old plantations	122	<b>1</b>	Grants, Production, Extension	Producers	MINADER	To be set up	Writing of methodology on regeneration techniques; Extension.	
	- Set up facilities for regeneration and maintenance of old plantations and abandoned exploitations (e.g.: Plants, Fertilizers, ZEW).	123	<b>2</b>	Grants, Production	Producers	<b>MINADER</b> : - (a) 2P3C - (b) NAERP	Timid measures, To be strengthened		

## Implementation plan of the Cameroon Coffee Sector Development Strategy

### OBJECTIVE 1 : INCREASE THE VOLUME OF COFFEE PRODUCTION AND IMPROVE QUALITY

OBJECTIVE	Sub objective	-Activities	Activity N°	PRIORITY	Action Type	Direct Beneficiaries	EXISTING NATIONAL MEASURES		Additional support needed	
							In charge of Implementation	Actions in progress		
1 - INCREASE THE VOLUME OF COFFEE PRODUCTION AND IMPROVE QUALITY	<b>1.3. PROMOTE ESTABLISHMENT OF YOUNG GROWERS</b>									
		- Support made available for establishment of young growers	131	<b>1</b>	Grant / Structuring/ Sensibilization	Young growers		<b>MINADER</b> : PAIJA <b>MINJEUN</b> : PAJER-U	Project in process To be strengthened	Develop support programme for young growers
		- Creation of pioneer fronts (land allocated and made available for coffee and food crops);	132	<b>2</b>						
		- Construction of community camps and huts	133	<b>3</b>						
		- Support diversification of coffee growers' income and of young growers in particular [agriculture (cash and food crops) + livestock];	134	<b>1</b>						
	<b>1.4. STRENGTHEN RESEARCH</b>									
		- Rehabilitation and enrichment of collections (prospect for local varieties and careful introductions of new varieties)- Co-operation with other producing countries;	141	<b>1</b>	Grants / Research	Researchers, PSCC, producers	<b>IRAD</b> : SMVB	Has just begun with insufficient funds -to be strengthened	Put in Networks and knowledge transfer; Strengthen IRAD and University capacity	
		- Increase in the number of improved varieties to disseminate to the producers (selection and variety improvement - Expertise of international research organizations	142	<b>1</b>						
		- Research on manufacture of organic fertilizers and pesticides	143	<b>2</b>		Producers	- IRAD - University Ydé	To be set up		
		- Soil study and mapping	144	<b>1</b>		Producers, MINADER, IRAD	IRAD	To be set up		
	<b>1.5. SET UP PRODUCTION INCENTIVE PROGRAMMES</b>									
		- Strengthen extension services and ZEW, and intensify awareness at PO level	151	<b>1</b>	Grants / Structuring	Producers	<b>MINADER</b> : NAERP	To be strengthened	Improve effectiveness of agricultural extension	
		- Give incentives to invest in the coffee growing economy (promote coffee growing) at all levels of the value chain	152	<b>1</b>	Communication / Information	All stakeholders	CICC NCCB	Measures to be put in place		
	- Produce agricultural best practice manual on coffee	153	<b>1</b>	Communication / Information	All stakeholders	IRAD - MINADER - NCCB	To do	Technical assistance		

## Implementation plan of the Cameroon Coffee Sector Development Strategy

### OBJECTIVE 1 : INCREASE THE VOLUME OF COFFEE PRODUCTION AND IMPROVE QUALITY

OBJECTIVE	Sub-Objective	Activities	Activity N°	PRIORITY	Action Type	Direct Beneficiaries	EXISTING NATIONAL MEASURES		Additional support needed
							In charge of Implementation	Actions in progress	
1 - INCREASE THE VOLUME OF COFFEE PRODUCTION AND IMPROVE QUALITY	<b>1.6. PROMOTE THE PURCHASE OF MODERN AND HIGH PERFORMING EQUIPMENT</b>								
		- Develop/Improve PO drying, hulling and stocking capacity	161	<b>1</b>	Grants	Producers and Buyers	<b>NCCB</b> : PAC	Has just begun	
		- Supply producers with phytosanitary appliances and equipment	162	<b>1</b>	Grants	Producers	<b>MINADER</b> : PPVCC	Beg 2 <sup>nd</sup> phase	Financing of purchases
		- Update studies and build coffee pulping and washing stations (Central Processing Units (CPU)):	163	<b>2</b>	Study and pilot equipment	Producers and Millers	CICC NCCB	To do	Study and Financing
	<b>1.7. STRENGTHEN CAPACITY IN TERMS OF PRODUCTION</b>								
		- Train farmers on how to use inputs	171	<b>1</b>	Training	Producers	<b>MINADER</b> : PPVCC	To be set up	- Capacity Development, - Training; - Knowledge transfer
		- Continuing education for producers on farming and post-harvest best practices	172	<b>1</b>	Training	Producers	<b>MINADER</b> : - NAERP (a) - PPVCC (b)	To be set up	
	- Recruit and train coffee specialists in various levels (senior level and technicians)	173	<b>1</b>	Training	Producers	NCCB	To be set up		
	- Train craftsmen to repair agricultural equipment	174	<b>2</b>	Training	Producers, millers	CICC	To be set up		

## Implementation plan of the Cameroon Coffee Sector Development Strategy

### OBJECTIVE 2: STREAMLINE INTERNAL MARKETING AND PROFESIONALIZE OPERATORS

OBJECTIVE	Sub-objective	Activities	Activity N°	PRIORITY	Action Type	Direct Beneficiaries	EXISTING NATIONAL MEASURES		Additional support needed
							In charge of Implementation	Actions in progress	
2 – STREAMLINE INTERNAL MARKETING AND PROFESSIONALIZE OPERATORS	<b>2.1. EQUIP THE SECTOR WITH AN EFFICIENT INFORMATION SYSTEM</b>								
		- Re-enforce and modernize the sector information system by involving the entire sector	211	<b>1</b>	Communication / Information	All direct and indirect stakeholders	NCCB: SIF (a) CICC: PACICC (b) MINADER	a : starting b: in 2 <sup>nd</sup> year	- Technical assistance ; - Develop capacity
		- Set up a Coffee Exchange	212	<b>3</b>	Study	Producers, Buyers	NCCB / ICO	Study approved by ICO	- Study; - Technical assistance ; - Develop capacity;
			Institutionalize		NCCB: SIF		starting		
	<b>2.2. PROMOTE QUALITY</b>								
		- Equip POs with suitable tools (scales, moisture metres..)	221	<b>1</b>	Grants	Producers, Buyers	NCCB: PAC (a) CICC: PACICC (b)	a : has just started b: 2 <sup>nd</sup> year means To be strengthened	- Acquisition financing; - Capacity development
		- Promote general adoption of pre-control by POs and buyers	222	<b>1</b>	Institutionalize				
		- Adapt the national norms for determining quality to developments in the international market	223	<b>1</b>	Regulation	Exporters, Producers	MINCOMMERCE MINIMIDT NCCB CICC	To do	Technical assistance
		- Implement a traceability system for specialty coffees.	224	<b>3</b>	Regulation / Structuring				
		- Job description drafted for each category of operator in the sector	225	<b>3</b>	Regulation / Structuring	All direct and indirect stakeholders			
	- Reinstate measures aimed at giving recognition prizes to the best farmers and/or operators	226	<b>2</b>	Study	Producers	NCCB CICC MINADER	Proposals to be submitted		

## Implementation plan of the Cameroon Coffee Sector Development Strategy

### OBJECTIVE 2: STREAMLINE INTERNAL MARKETING AND PROFESSIONALIZE OPERATORS

OBJECTIVE	Sub-objective	Activities	Activity N°	PRIORITY	Action Type	Directs Beneficiaries	EXISTING NATIONAL MEASURES		Additional support needed		
							In charge of Implementation	Actions in progress			
2 – STREAMLINE INTERNAL MARKETING AND PROFESSIONALIZE OPERATORS	<b>2.3. PROMOTE EMANCIPATION OF PRODUCER ORGANIZATIONS</b>										
		- Support producer groups and reinstate the grower's pass-book	231	<b>1</b>	Structuring	Producers	MINADER : - PARI (a) - PPVCC (b) CICC: PACICC (b)	a: currently being restructured b: 2nd phase C : in its 2 <sup>nd</sup> year			
		- Promote stable partnerships between producers and buyers	232	<b>2</b>	Agreementss				Examples: Initiatives Terre noire, Olam, UTI,	Current private initiatives	
		- Quality control training for producers	233	<b>1</b>	Training				NCCB : PAC	Current	
		- Introduce producers to liquoring	234	<b>2</b>					NCCB	To be set up	Technical assistance
		- Continuing Education for producers on management, packaging and marketing	235	<b>1</b>					NCCB: PAC (a) CICC: PACICC (b)	Current	
		- Promote other coffee products (pulp and husk) -	236	<b>2</b>					Producers Millers	IRAD NCCB	To be set up
	<b>2.4. PROMOTE COMMERCIAL BEST PRACTICE</b>										
		- Producer Organizations encourage group sales, that follow market calendars	241	<b>1</b>	Training	Producers	NCCB: PAC (a) CICC: PACICC (b)	Current			
		- POs organize market days in production zones	242	<b>1</b>	Regulation / Structuring	Producers and Buyers					

## Implementation plan of the Cameroon Coffee Sector Development Strategy

### OBJECTIVE 2 : STREAMLINE INTERNAL MARKETING AND PROFESSIONALIZE OPERATORS

OBJECTIVE	Sub-objective	Activities	Activity N°	PRIORITY	Action Type	Direct Beneficiaries	EXISTING NATIONAL MEASURES		Additional support needed
							In charge of Implementation	Actions in progress	
2 – STREAMLINE INTERNAL MARKETING AND PROFESSIONALIZE OPERATORS	<b>2.5. FACILITATE FINANCING FOR COFFEE GROWING</b>								
		<ul style="list-style-type: none"> <li>- Set up tools more suited to the trade of basic commodities (e.g. warehouse receipts and warrants)</li> </ul>	251	<b>1</b>	Structuring / Agreements	Producers	MINADER :(PAD-MC2/MUFA), (PCRD) NCCB: PAC (a) CICC: PACICC (b)	a : 1 <sup>st</sup> year b: is in its 2 <sup>nd</sup> year no expertise	Technical assistance ; Capacity development
		<ul style="list-style-type: none"> <li>- Expansion of micro-finance for smallholders in production zones;</li> </ul>	252	<b>1</b>	Agreements	Producers			Technical assistance
		<ul style="list-style-type: none"> <li>- Set up a credit line or a Guarantee Fund for crop finance to benefit POs</li> </ul>	253	<b>1</b>	Structuring	Producers			no expertise, needs financial means
	<b>2.6. PROMOTE A PARTICIPATIVE APPROACH AND FAVOUR SYNERGIES IN THE SECTOR</b>								
		<ul style="list-style-type: none"> <li>- Annual workshop on export issues with: exporters, forwarding agents, port authorities, phytosanitary companies, Quality control, GUCE, Customs, Foreign buyers, NCCB, CICC, GEX, tax office, etc.</li> </ul>	261	<b>1</b>	Structuring	Exporters	NCCB, CICC	Measures to be put in place	Technical assistance
		<ul style="list-style-type: none"> <li>- Annual workshop on marketing issues with: producers, millers, buyers, exporters, NCCB, CICC, tax office, etc.</li> </ul>	262	<b>1</b>	Structuring	Producers, Millers, Exporters	NCCB, CICC		
		<ul style="list-style-type: none"> <li>- Every six months, meeting of all the coffee project leaders</li> </ul>	263	<b>1</b>	Structuring	Producers, Millers, Exporters	NCCB, CICC		
		<ul style="list-style-type: none"> <li>- Specific meetings or workshops of professionals (nursery operators, fertilizers, pesticides, markets, milling, financing, promotion, taxes, young growers, etc.)</li> </ul>	264	<b>1</b>	Structuring	All stakeholders	NCCB, CICC		

## Implementation plan of the Cameroon Coffee Sector Development Strategy

### OBJECTIVE 3 : OPEN UP NEW MARKETS WITH COMPETITIVE COFFEE

OBJECTIVE	Sub-objective	Activities	Activity N°	PRIORITY	Action Type	Direct Beneficiaries	EXISTING NATIONAL MEASURES		Additional support needed
							In charge of Implementation	Actions in progress	
3 – OPEN UP NEW MARKETS WITH COMPETITIVE COFFEE	<b>3.1. INCREASE DOMESTIC CONSUMPTION</b>								
		- Permanent promotion campaign to improve status of coffee compared to other drinks - Inform population on the virtues of coffee and how to prepare it;	311	<b>1</b>	Communication / Information	Roasters	NCCB: SIF	Starting	Technical assistance
		- Annual coffee promotion event	312	<b>1</b>	Promotion	Roasters / Producers	MINCOMMERCE NCCB CICC	Measures to be set up	
		- Develop coffee consumption in its various forms	313	<b>1</b>	Research	Roasters / Producers	NCCB, IRAD	Measures to set up	
	<b>3.2. INCREASE VOLUME AND QUALITY OF LOCAL PROCESSING</b>								
		- Training of Roasters	321	<b>1</b>	Training	Roasters	NCCB, CICC	Measures to set up	
		- Organization of Roasters	322	<b>1</b>	Structuring	Roasters	CICC	Measures to set up	
	<b>3.3. FIND NEW MARKETS</b>								
		- Promotion programme of Cameroon coffees on the international scene	331	<b>1</b>	Promotion	Exporters, Roasters, Producers	NCCB	On-going	Technical assistance
		- Seek new markets, lesser known and less demanding	332	<b>1</b>	Promotion	Exporters, Roasters, Producers	NCCB, CICC	On-going	
		- Develop niche markets, in particular for fully washed coffee (Robusta et Arabica)	333	<b>2</b>					
		- Study to assess the potential of the sub-regional market (Central Africa and Nigeria) for roasted coffee	334	<b>2</b>	Study	Exporters, Roasters, Producers	NCCB		Technical assistance

## Implementation plan of the Cameroon Coffee Sector Development Strategy

### GENERAL PREAMBLE : IMPROVE GLOBAL ENVIRONMENT

OBJECTIVE	Activities	Activity N°	Action Type	Direct Beneficiaries	In charge of Implementation
IMPROVE GLOBAL ENVIRONMENT	- Build and rehabilitate market centres	<b>A</b>	Public services	Producers and Buyers	Various ministries
	- Build schools in rural areas	<b>B</b>	Public services	Producers and local population	Ministry of Basic Education
	- Build health centres in rural areas	<b>C</b>			Ministry of Public Health
	- Install electricity in rural areas	<b>D</b>			Ministry of Energy + ARSEL
	- Water sources in rural areas	<b>E</b>			Ministry of MINES
	- Create feeder roads in production areas and involve residents in their upkeep	<b>F</b>			Ministry of Public Works
	- Reduce electricity cost for coffee milling and roasting	<b>G</b>			Regulation
	- Create an agricultural bank with accessible conditions for producers	<b>H</b>	Institutionalize	Producers	Ministry of Agriculture; and of Finance
	- Remove tax (remove custom charges, VAT and other taxes) on pesticides, agricultural equipment and material, and roasting.	<b>I</b>	Regulation / Institutionalize	Producers, Millers, Roasters	Ministry of Agriculture; and of Finance
	- Cancellation of PO debts, of CAMCCUL and Cooperatives in Arabica growing areas in Cameroon specifically, and also of SRC	<b>J</b>	Collection / Refinancing	Cooperatives	Ministry of Agriculture; and of Finance
	- Optimize use of Single Window for handling transactions – Reduce transaction costs – Adapt to international norms	<b>K</b>	Institutionalize	Exporters	Ministry of Transport
	- Write a specific agriculture investment code	<b>L</b>	Communication / Information	All stakeholders	MINADER, MINIMIDT, MINCOMMERCE
	- Technical support in manufacture of mineral and organic fertilizers and pesticides	<b>M</b>	Grants, Investments	Producers	MINADER, MINIMIDT, MINCOMMERCE



# VI STRATEGY IMPLEMENTATION FRAMEWORK

## 1. Strategy Implementation Framework

### **From developing the strategy...**

At the conclusion of the November 2008 workshop and following a proposal from the participants, the Cameroon Authorities made a firm commitment to the elaboration of the coffee sector development strategy by the immediate launch of a Task Force in charge of the preparation of the strategy document, and subsequently, of ensuring its implementation was followed up.

This Task Force is constituted from the majority of Cameroonian institutions involved in coffee sector development. The shared analysis efforts and reflection of this group made it possible to bring about the present strategy which identifies the key objectives on which there is consensus, and the conditions which should enable the revival of the coffee sector.

Beyond the chosen objectives, the creation of this Task Force enabled dialogue to begin at all levels of the value chain and institutions. This should be used to benefit the implementation of the strategy.

### **to its implementation**

The broad extent of the chosen objectives in the strategy requires an effective and coordinated implementation of the actions, especially in a context of scarcity of resources. It is therefore essential to guarantee cohesion and that complementarity of efforts be made.

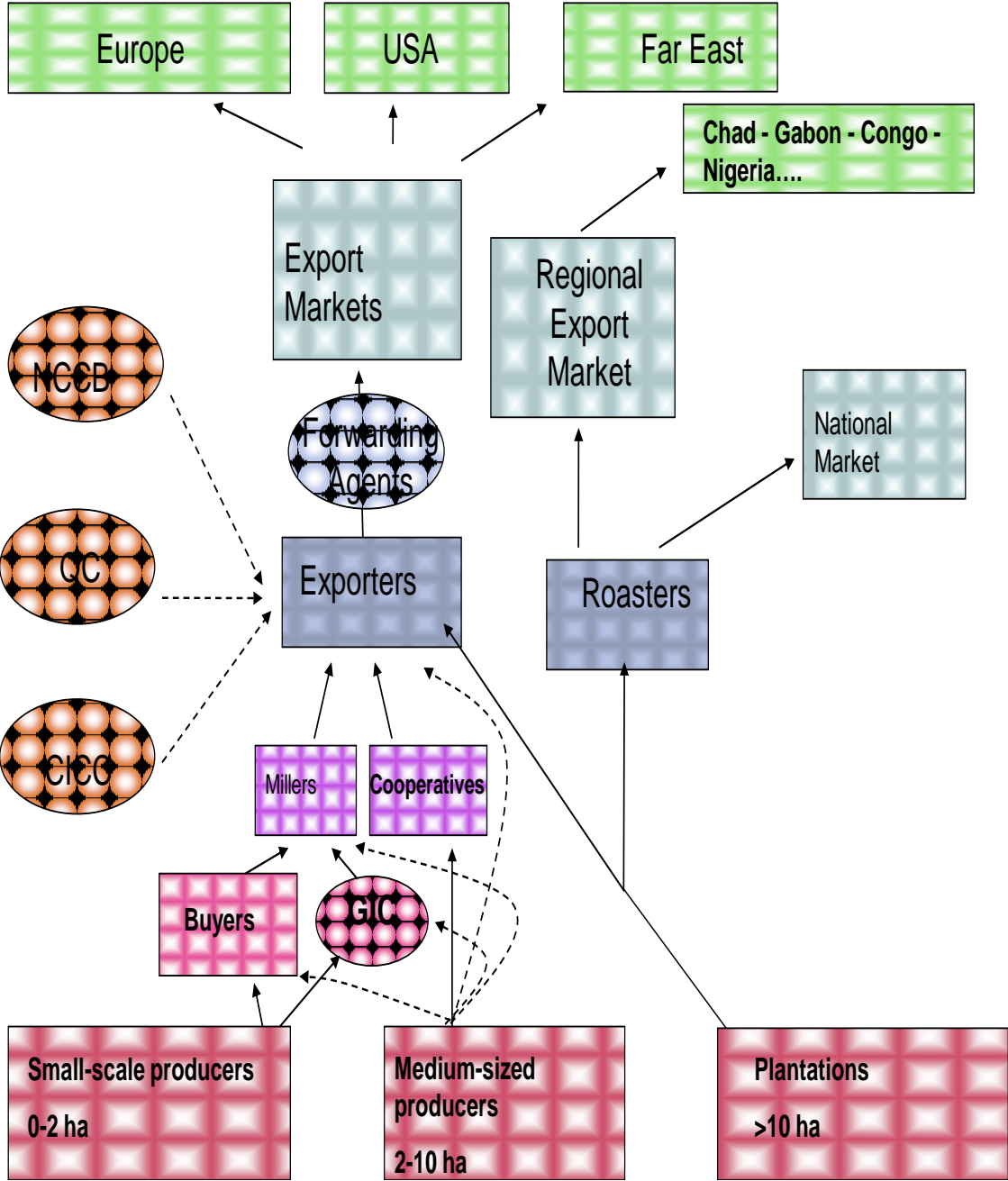
Maintaining and strengthening the Task Force, in particular through an adequate mandate and adequate resources, will enable:

- to maintain discussion between the private and institutional stakeholders of the sector;
- joint decision-making in selecting priorities in accordance with available resources;
- to promote the coffee sector to the authorities to encourage them to maintain their commitments for the revival of the sector;
- to call upon various stakeholders as needed to support the implementation of the strategy;
- to translate the objectives and the priorities into proposed actions for the decision makers, in collaboration with the stakeholders concerned;
- to suggest specific initiatives and to support the institutions in charge of defining and implementing them;
- to be a meeting point and focal point of expertise and knowledge in the coffee sector;
- to ensure the strategy is periodically reviewed and updated: and,
- to be the interface between the stakeholders of the sector in order to keep them to their commitments.

With no decision-making power strictly speaking, the role of the Task Force in implementation will be to promote, propose, remind, influence and advise.

The credibility of the Task Force will come from its representativeness of the sector, its quality and its expertise and finally, the relevance of the proposals it initiates.

# ANNEXE 1: Coffee Value Chain in Cameroon





## **ANNEXE 2: Cost estimate of the Coffee Strategy**

The will of the Cameroonian authorities to revive the coffee sector is seen in the fact that over ten programmes and projects likely to respond to the various expectations are already under way even as the sector adopts a strategy for its development. A dozen of them are directly related to coffee. The amount of financing allocated to these projects is approximately 8 billion CFA francs.

The cost of the coffee growing revival in Cameroon, through the various activities identified in the implementation plan of the strategy, is estimated, for the next five years, at 24.5 billion CFA francs, of which:

- 8 billion is already committed by the Cameroonian Government in current programmes and projects;
- 10 additional billion can be raised by FODECC, PIB, ministries and governmental agencies over this period; and
- Various international partners would be approached for a little over 6 billion.

Additional measures which should supplement those existing were listed in the form of project profiles. An initial estimate of these projects is of 16.5 billion CFA francs. External support will have to be solicited from the international organizations willing to participate in the recovery of coffee growing in Cameroon.

## CURRENT PROJECTS AND PROGRAMMES IN THE COFFEE SECTOR IN CAMEROON

N°	ACRONYM	FULL NAME OF PROJECT	STRUCTURES IN CHARGE OF IMPLEMENTATION	Cost (*000 CFA francs) of which:		Sources of financing	Duration	Effective start date	State of progress	OBSERVATIONS
				TOTAL	COFFEE					
1	2P3C	Projet Pilote pour la relance du Cacao, Café et Coton	MINADER	1 800 000	600 000	- MDRI - PIB MINADER	2 years (pilot phase)	2008	2 <sup>nd</sup> year	Coffee, cocoa and cotton
2	ACEFA	Programme for the Improvement of Competitiveness of Family Agro pastoral Farms	MINADER			PSTE (C2D)		2009	Has just begun	All crops
3	CIPCRE	International Circle for the Promotion of Creation	Christian NGO	104 000		Coopération française	On-going	1991		All crops
4	PAC	Projet d'Assainissement de la Commercialisation interne dans les filières cacao et café	NCCB	3 741 000	500 000	- NCCB - FODECC - PACICC	6 years	2009	1st year	Coffee and Cocoa
5	PACICC	Programme d'Appui au Conseil Interprofessionnel du Cacao et du Café	CICC	1 557 000	500 000	European Union	3 years	2008	2nd year	Coffee and Cocoa
6	PAIJA	Programme d'Appui à l'insertion des Jeunes en Agriculture	MINADER MINEPIA	22 168 000		- PIB MINADER - PIB MINEPIA	5 years with a 2 year pilot phase	2006	5 sites created in 5 regions	All agriculture crops and livestock
7	PAJER-U	Programme d'Appui à la Jeunesse Rurale et Urbaine	MINJEUN	12 000 000		- PSTE - PIB MINJEUN	Pilot stage:	2007	All projects financed	All agriculture crops and livestock
8	NAERP	National Agricultural Extension and Rural Program	MINADER			- PSTE - PIB MINADER	On-going	1980	Redynamization in progress	PSTE and PIB since 2006
9	PPDMVCC	Projet d'appui à la Production et à la Diffusion du Matériel Végétal de Cacao et de Café	MINADER	5 627 647	1 650 000	- FODECC	3 years	2009	1st year	Cocoa and Coffee
10	PPVCC	Projet d'appui à la Protection du Verger Cacao/Café	MINADER	6 100 000	2 000 000	- PSTE - PIB MINADER	6 years	2003	New programme not yet started	New phase submitted for financing
11	PRSE	Programme de Reforme du Sous Secteur Engrais	MINADER	2 700 500		- USAID (2 625 500) - PIB MINADER (75 000)	On-going	1994		
12	PSCC	Projet Semencier Cacao/Café	MINADER	300 000 (annuel)	100 000	- PIB MINADER	On-going	permanent	Current	Coffee and Cocoa
13	SCTP	Sustainable Crop Tree Programme	IITA			- IITA			Completed	
14	SIF	Renforcement et modernisation du système d'Information des filières Cacao et Cafés au Cameroun	NCCB	2 000 000	600 000	- NCCB - FODECC - CICC - UNCTAD	4 years	2009	Not yet active	Coffee and Cocoa
15	SMVAB	Sélection et Diffusion du Matériel Végétal amélioré de Base en vue de l'amélioration de la productivité des vergers cacaoyer et caféier	MINRESI	1 408 000	417 000 (Ara) 453 000 (Rob)	- FODECC	5 years	2009	1st year	Coffee and Cocoa
<b>Total Estimated =</b>					<b>8 000 000</b>					

## NEW OR SUPPLEMENTARY PROJECTS IDENTIFIED

N°	TITLE	Sectors concerned	Type	Reference in implementation plan	Duration	Estimate of COST ('000 CFA francs)	Likely sources of funding
1 -	Appui à la production et à la diffusion des semences améliorées	- Production - Research	1	111	3 years	4 000 000	- WB - BAD - UE
2 -	Approvisionnement régulier des Organisations de producteurs en engrais et pesticides	- Production - Research	1	112,113	3 years	5 000 000	- FAO - WB - BAD - UE
3 -	Appui à l'installation des jeunes dans la caféiculture	- Production - Young growers	1	131 - 134	3 years	2 500 000	- FAO - WB - BAD - UE
4 -	Appui à la diversification des variétés de Café	- Research	1	142	5 years	1 000 000	- FAO - WB - BAD - UE
5 -	Appui à la recherche et la production des engrais organiques	- Research	1	143	5 years	250 000	- FAO - WB - BAD - UE
6 -	Study of soil (Coffee pedology)	- Research	2	144	1 year	300 000	- FAO - WB - BAD - UE
7 -	Promotion of investments in coffee growing	Promotion	2	152	Annual	30 000	- NCCB - FODECC
8 -	Development of an Agricultural Code (coffee orientated)	Structuring	2	154	3 years	2 00 000	- WB - FAO - CFC - MINADER
9 -	Publishing and distribution of best agricultural practice manual	Structuring	2	172	1 an	100 000	- FAO - NCCB - CICC - FODECC
10 -	Support for training of coffee specialists	Production	2	173	3 years	300 000	- FAO - NCCB
11 -	Writing and distribution of Grower's pass-book	Structuring	2	231	1 year	100 000	- FODECC
12 -	Promotion of Liquoring at producer level	Promotion	2	234	3 years	200 000	- FAO - NCCB - ITC
13 -	PO support to rationalization of their sales	- Marketing - Structuring	2	235	5 years	150 000	- ITC - UNCTAD - NCCB
14 -	Study on improving status of coffee sub-products and non traditional use of coffee	Research	2	236	3 years	150 000	- FAO - NCCB - CICC
15 -	Suitable tools for crop finance	- Financing - Structuring	2	253	3 years	2 000 000	- WB - BAD - AFD - UE
16 -	Definition and implementation of coffee promotion policy	- Study - Promotion	2	331	3 years	100 000	- ITC - UNCTAD - NCCB
17 -	Knowledge of non-traditional coffee markets for Origine Cameroun	Studies	2	332	3 years	150 000	- NCCB - FODECC - ITC - ACRAM
<b>TOTAL ESTIMATED =</b>						<b>16 530 000</b>	

\* Type 1 : Projects supporting current initiatives

\* Type 2 : New projects, no initial initiatives



## ANNEXE 3: List of participants (meeting 11th and 13th November 2008)

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Mr Jean Pierre TCHOKAM	MINADER
Mr Joseph MOUEN BEDIMO	MINRESI – IRAD
Mr Luc NJOCK NKEN	MINADER
Mr Foka MEFINJA	CICC
Mr Omer MALEDY	NCCB
Mr Jonas DJOMO	MINADER
Mr Wim IMPENS	EU
Mr Sylvestre ESSONO MESSANGA	MINCOMMERCE
Mr Michael NDOPING	NCCB
Mr Abdoulaye NANA	NCCB
Mr Pierre TSIMI ENOUGA	CICC / FODECC
Mr Jean Marc OYONO	MINADER
Mr Amos NJEHOYA	MINADER
Mr Disectorr NGONO	MINADER

